



**AGENDA
CITY MANAGER SEARCH COMMITTEE
REGULAR MEETING
APRIL 17, 2023
6:00 PM
CITY COMMISSION CHAMBERS
204 ASH STREET
FERNANDINA BEACH, FL 32034**

1. CALL TO ORDER

2. PLEDGE OF ALLEGIANCE

3. ROLL CALL

4. ELECTION OF OFFICERS

4.1 *Elect Chair, Vice Chair and Recording Secretary.*

5. NEW BUSINESS

5.1 *Establish City Manager Search Committee meeting frequency.*

5.2 *Review - Charter Section 25: City Manager appointment; tenure of office; qualifications.*

5.3 *Review - Charter Section 29: City Manager powers and duties enumerated.*

5.4 *Review - International City/County Management Association (ICMA) - Local Government Administrator Recruitment Guidelines.*

5.5 **EXECUTIVE SEARCH FIRM** - *The City Commission at their April 4, 2023, Regular Meeting, approved Resolution 2023-50, as amended, to direct staff to contact the executive search firm Strategic Government Resources (SGR) to perform three services contained within their proposal: recruit qualified applicants, vetting the qualified applicants, and providing the list of qualified and vetted applicants to City staff. This list will be further vetted by the City Manager Search Committee. Based upon Commission direction, Human Resources Director Denise Matson, who serves as the CMSC staff liaison, emailed SGR to inquire about the cost of these services. SGR declined providing partial services. Therefore, a Resolution to consider SGR's full proposal is on the April 18, 2023, City Commission Regular Meeting.*

5.6 *Discussion - City Manager Qualifications*

6. PUBLIC COMMENT

7. NEXT MEETING DATE

7.1 *Next meeting date - May 23, 2023.*

7.2 *Alternate Meeting Date - discuss alternate June 19 meeting date due to Juneteenth, a City observed holiday.*

8. ADJOURNMENT

All members of the public are invited to be present and be heard. Persons with disabilities requiring accommodations in order to participate in this program or activity should contact the City Clerk at (904) 310-3115 or TTY/TDD 711 (for the hearing or speech impaired). All interested parties may appear at said meeting and be heard as to the advisability of any action, which may be considered with respect to such matter. For information regarding this matter, please contact the City Attorney.

Charter Section. 25. - City Manager appointment; tenure of office; qualifications;

The City Commission must appoint a City Manager who is the administrative head of the municipal government under the direction and supervision of the City Commission and holds office at the pleasure of the City Commission. The City Manager must be chosen solely on the basis of executive and administrative qualifications without regard to political belief, and need not be a resident of the City or state at the time of appointment; however, not later than 90 days after executing the Oath of Office, the City Manager must become a resident of the City. The City Manager must have prior management experience, and the Commission must consider more than one (1) qualified candidate for City Manager. The City Manager must be a member in good standing of a professional organization such as the International City/County Management Association prior to appointment or within six (6) months after appointment. The City Commission will establish an appropriate contract for the City Manager, which contains the employment conditions, compensation, benefits and such other terms as may be appropriate. The City Manager may also be deemed to be a regular employee of the City, and the employment conditions, compensation, benefits and other terms may be set by the City Commission through ordinance, resolution or policy.

(Laws of Fla., ch. 8949(1921), § 25; Ord. No. 91-17, § 1, 9-17-91; Ord. No. 98-4, § 1, 2-17-98; Ord. No. 2005-40, § 3, 1-17-06; Ord. No. 2020-21 , § 17, 1-19-21)

Charter Section. 29. - Powers and duties enumerated.

The City Manager is responsible to the City Commission for the proper administration of all affairs of the City, and to that end has the following powers and duties:

- (a) To see that the laws and ordinances are enforced;
- (b) Except as hereinafter specifically provided, to appoint and remove all subordinate officers and employees of the City; all appointments to be made upon merit and fitness alone;
- (c) To exercise control and direct supervision over departments and divisions of the municipal government under this Charter, or which may hereafter be created by the City Commission, including setting the compensation for officers and employees;
- (d) To see that all terms and conditions imposed in favor of the City or its inhabitants in any contract are faithfully kept and performed; and upon knowledge of any violation thereof, to call the same to the attention of the City Attorney, whose duty it is hereby made to take such legal steps as may be necessary to enforce the same;
- (e) To attend all meetings of the City Commission, and of its committees, with right to take part in the discussions, but without having a vote;
- (f) To recommend to the Commission for adoption such measures as deemed necessary or expedient in the interests of the City;
- (g) To keep the City Commission fully advised as to the financial condition and needs of the City and to submit for its consideration an annual budget and five-year capital improvement plan;
- (h) To be responsible for the procurement, sale of surplus, management, payment, and contract compliance for all supplies, services, and construction contracts, including any Federal, State, or other grant funded activity, at the direction of the City Commission and in accordance with all applicable City, State, or Federal laws and regulations ; and
- (i) To designate a City Manager pro tem to be approved by the City Commission to serve in case of absence or disability of the City Manager.

(Laws of Fla., ch. 8949(1921), § 29; Ord. No. 91-17, § 1, 9-17-91; Ord. No. 2020-21 , § 18, 1-19-21)

Recruitment Guidelines for Selecting a Local Government Administrator



January 2012

ICMA

Leaders at the Core of Better Communities

Recruitment Guidelines for Selecting a Local Government Administrator

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About ICMA

ICMA advances professional local government worldwide. Its mission is to create excellence in local governance by developing and advancing professional management of local government. ICMA, the International City/County Management Association, provides member support; publications, data, and information; peer and results-oriented assistance; and training and professional development to more than 9,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect 185 million individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

ICMA
777 North Capitol Street, NE
Suite 500
Washington, DC 20002-4201
202-289-ICMA (4262)
icma.org

Preface

This *Recruitment Guidelines for Selecting a Local Government Administrator* was first published just over ten years ago. While a lot has changed in ten years, the basic process for selecting a chief administrator¹ has remained substantially the same. It still requires careful planning, astute evaluation of candidates, and a clear understanding of the relationship between the governing body² and the chief administrator. In this edition, however, new focus has been given to the ICMA Code of Ethics—the foundation of the local government management profession—and the emergence of the Voluntary Credentialed Manager program.

The Task Force on Recruitment Guidelines was formed in Fall 2010 and consisted of a very diverse group of ICMA members (many of whom have served on the ICMA Executive Board), Range Riders (former local government practitioners), younger members of the local government management profession, and representatives from executive search firms. From its only face-to-face meeting at the 2010 ICMA Conference in San José, this Task Force embraced the challenge of updating the guidelines. Over the next several months, we formed work groups to focus on three key elements of the process: recruitment, selection, and negotiation. After countless conference calls and emails, the new and improved *Recruitment Guidelines for Selecting a Local Government Administrator* emerged.

The Task Force consisted of the following ICMA members:

Jane Bais-DiSessa

City Manager
Berkley, Michigan

Bill Baldridge

Executive Search Committee
Former City Manager
Michigan Municipal League

Troy Brown

Assistant City Manager
Livermore, California

Garry Brumback

Town Manager
Southington, Connecticut

Charlie Bush

City Administrator
Prosser, Washington

Mike Casey

Partner
Management Partners, Inc.
Cincinnati, Ohio

Tony Dahlerbruch

City Manager
Rolling Hills, California

Ed Daley

City Manager
Hopewell, Virginia

Tim Ernster

City Manager
Sedona, Arizona

Tom Fountaine

Borough Manager
State College, Pennsylvania

¹ Chief administrator refers to a manager, administrator, or executive of a local government.

² Governing body refers to the elected officers of a town, village, borough, township, city, county, or a legally constituted council of governments.

Peter Herlofsky

Former City Administrator
Farmington, Minnesota

Kay James

City Manager
Canandaigua, New York

Dave Krings

Former County Manager
Hamilton County, Ohio
Peoria County, Illinois

Debra Kurita

Former Assistant City Manager
San Bernardino, California

Juliana Maller

Deputy City Manager
Park Ridge, Illinois

Bob Murray

President
Bob Murray & Associates
Roseville, California

Andy Pederson

Village Manager
Bayside, Wisconsin

Sheryl Sculley

City Manager
San Antonio, Texas

William Sequino

Town Manager
East Greenwich, Rhode Island

Paul Sharon

ICMA Range Rider, Florida
Former Town Manager
Ashland, Massachusetts
North Andover, Massachusetts

Scot Simpson

City Administrator
River Falls, Wisconsin

Charlene Stevens

City Administrator
Willmar, Minnesota

Larry Stevens

City Manager
Edmond, Oklahoma

Bill Taylor

Field Services Manager
Municipal Association of South Carolina
Columbia, South Carolina

Michael Van Milligen

City Manager
Dubuque, Iowa

Melissa Vossmer

City Manager
Angleton, Texas

Michael Willis

General Manager
Shellharbour City Council
New South Wales, Australia

Special appreciation is extended to Tom Fountaine for serving as the negotiation section chair; Peter Herlofsky, selection section chair; and Debra Kurita, recruitment section chair. Debra Kurita deserves special recognition as she labored many hours converting writing styles and formats into one consistent, easy-to-read document. On behalf of ICMA, I am grateful for the active engagement of each Task Force member. Special thanks to Jared Dailey of the ICMA staff, who assisted in the overall coordination of the Task Force.

It is the hope of the Task Force that this guidebook is promoted and distributed to those who are in the environment to hire a chief administrator for a community. To the governing body representatives who use this guidebook, we thank you for your service to your communities and wish you every success in finding the professional local government manager to help you guide your community to be the best it can be.

In closing, it has been my privilege to have served as the chair of this Task Force.

Bonnie Svrcek
Deputy City Manager
Lynchburg, Virginia

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1. Introduction

"Thousands of decisions are made every day in cities, towns, and counties that determine our quality of life.... Professional managers craft the plans and make the decisions that transform good communities into great ones.

—International City/County Management Association (ICMA)

Selecting a chief administrator is perhaps the most important decision that elected local officials will make for their community.

This guidebook was created by experienced, seasoned local government managers. It is designed to help elected officials, human resource professionals, local government staff, and professional executive search firms navigate the recruitment, selection, and negotiation processes to find the individual who is best suited to serve as the chief administrator. The chief administrator is like an orchestra conductor, directing and managing a team of professional, administrative, and field staff while interpreting and working toward the goals and objectives of the community's elected officials.

This guidebook offers best practices that will be most meaningful to you and your community in selecting a chief administrator. Because all communities, governing bodies, and chief administrators are not the same, this is not a "one size fits all" guidebook. Nevertheless, the local government managers who created this document are firmly committed to the ICMA Code of Ethics, which is a non-negotiable foundation for professional local government management, and strongly recommends that the hiring governing body use the Code of Ethics as a tool in its search for a professional local government manager. Herein, we explain recruitment choices and the selection processes to fit the unique size, culture, and dynamics of an individual community. Topics include provisions for interim management; the spectrum of resources available to assist in the recruiting process; applications, communications with applicants, and interviews; compensation; and transition. The appendices provide the ICMA Code of Ethics, ICMA Compensation Guidelines, a directory of professional organizations that are likely places to advertise for a chief administrator, potential interview questions, the do's and don'ts of applicant relations, and the ICMA Model Employment Agreement. Using this guidebook can make recruiting and selecting a new chief administrator a positive, enjoyable, and unifying experience for you and your colleagues as elected officials.

As you use this resource, you will see highlighted in the margins important points for selecting the best individual for the position.

When faced with an upcoming or immediate vacancy in the chief administrator position, the governing body must quickly address the following questions:

- What should we do to ensure that the affairs of the local government are properly administered until a new chief administrator is selected and on board?
- How do we conduct a recruitment to fill the vacancy?

The following material provides tips and guidelines on the processes that the governing body needs to employ to successfully answer these questions. It identifies and discusses the key elements of managing the organization between the time that one chief administrator departs and another arrives, as well as the major decision points in conducting the recruitment, selection, and negotiation processes for appointing the new chief administrator.

Professional local government managers are committed to

- Serving as stewards of representative democracy
- Practicing the highest standards of honesty and integrity in local governance, as expressed through ICMA's Code of Ethics
- Building sustainable communities as a core responsibility
- Networking and exchanging knowledge and skills across international boundaries
- Lifelong learning and professional development
- Financial integrity and responsibility for management of the community
- Implementing best management practices.

2. Managing the Organization during Recruitment

The governing body must act thoughtfully and deliberately in determining how to ensure that the operations of the local government are properly managed during the period before a permanent chief administrator is selected and on the job. When faced with a vacancy in the chief administrator position, the governing body needs time to carefully consider the qualities, expertise, and experience it hopes to find in a new administrator and to use the agreed-upon criteria to develop the administrator profile. It then needs sufficient time to recruit and select the best possible successor who meets these criteria. While that is happening, however, it is important that the governing body identify a professional who will act as the chief administrator and properly manage local government operations while the recruitment process is underway.

Major Decision Point: Appointing an Interim Administrator

If the vacancy is the result of a planned retirement, the governing body may consider asking the current administrator to continue leading the organization for a short period of time on a contract basis. Alternatively, the governing body may elect to consult with the outgoing administrator regarding possible staff members who could fill this role.

In some cases, the members of the governing body may agree that they have confidence in a specific staff person. If there is an assistant administrator, for example, the governing body may appoint that person as interim administrator. If this assistant will be considered for the permanent position, the appointment as interim administrator will provide the elected officials with an opportunity to observe firsthand how the assistant handles the job. Another option is to appoint an assistant or department director (who will not be a candidate for the position); someone who is mature, seasoned, competent and respected by fellow employees.

Should the governing body determine that there is no one on staff who it can or wants to appoint as the interim administrator, it may decide to retain the services of a retired administrator or an administrator who is between jobs. State associations, municipi-

pal leagues, or ICMA Range Riders are resources for identifying potential interim administrators.

The governing body should publicly announce the appointment of the interim chief administrator. Regardless of who is appointed, it should be made clear to all local government officials and staff that the interim chief administrator is responsible for implementing governing body policy and overseeing operations. It should also be made clear that if the interim administrator is ultimately selected to fill the position permanently, it will be because that person has proven to be the best among all the applicants.

Interim Management: The Governing Body's Role

Obviously, the local government must continue to operate during the interim between the departure of the current chief administrator and the appointment of the new one. The governing body and interim management team should do whatever is necessary to make sure that important projects and service delivery continue to move forward. It is important to reiterate that the governing body has the responsibility to make it clear to the staff and community that the interim administrator is in charge of the organization's operations.

The governing body should consider deferring new initiatives, when possible, until the new administrator is appointed and on the job. After all, to ensure effective administrative leadership in the future, it is desirable that the new administrator be involved in as many policy decisions as possible. Just filling a vacant department director position, for example, is an opportunity for the new administrator to begin building an administrative team. In fact, such an opportunity can be used to pique the interest of potential applicants during the recruitment process.

Although it is not desirable for the governing body to immerse itself in the administrative affairs of the local government, its members should be briefed about current organizational problems and the status of important projects before the current administrator leaves, if possible. In this way, the governing body may monitor progress on important matters, provide direction, and set priorities for the person selected as interim administrator.

3. Initiating the Recruitment

The governing body should initiate the recruitment process immediately after the official decision has been made regarding resignation, retirement, or termination. Failure to do so can potentially generate rumors within the community by various interested parties who may attempt to exert pressure on members to quickly fill the vacancy. The members of the governing body must bear in mind that an impulsive response to this pressure can be divisive for them and can damage their credibility. They must take charge of the recruitment: they must determine the process that will be used to recruit and select the best administrator, and make that decision clear to all concerned.

There may be a number of special circumstances that influence the approach and timing used to recruit a new chief administrator. The following examples provide some tips for addressing those circumstances:

- **Vacancy due to the chief administrator's termination or resignation under pressure.** If the position is vacant because the former administrator was terminated or forced to resign, neither the local government nor the former administrator will benefit from a public quarrel. It is far better for all concerned to mutually decide on a timetable for the administrator's departure. If this departure is handled professionally and in a mutually respectful manner, there is less likelihood for controversy and ill will to arise around the issues of the separation. Further, and from a recruiting standpoint, handling a difficult situation well will enhance the local government's image and thus its ability to attract quality applicants.
- **Vacancy occurring prior to an election.** Occasionally, a governing body will delay initiating the recruitment process because an election is pending. But even in the face of an election, it should prepare for the process by developing the administrator profile (described in full later in this document) and determining how the recruitment will be conducted so as to reduce the time lapse between the departure of one administrator and arrival of another.
- **Vacancies due to newly adopted council-manager form of government.** If the position is vacant because voters either just approved the formation of or adopted a change to the council-manager form of government, the beginning of the search for a new chief administrator will depend on when the change becomes effective. Depending on the circumstances, it may be possible to have applications on file by the time the new members of the governing body are sworn in. In any case, the recruitment process should be initiated as soon as possible.

4. Conducting the Recruitment

There are several major elements and decision points in the recruitment process. This section of the handbook provides tips and guidelines for the governing body in determining the approach to use in this part of the process.

The governing body has three major choices for conducting the recruitment. It can:

- Conduct the recruitment in-house
- Retain an outside party to conduct the recruitment
- Use a hybrid approach and conduct the recruitment in conjunction with an outside party.

In-House Expertise Method: Recruitments Conducted by the Local Government

If the governing body chooses to conduct the recruitment in-house, it should be with the understanding that the task will be time-consuming and complex. The governing body may also have to decide whether to conduct the process as a body, delegate the responsibility to the chairperson, or assign the task to a committee of its members. If it elects to delegate the responsibility to one or more of its members, it must be sure to select people who are well respected and have the time to provide the necessary leadership and follow-through.

To provide support in the process, the governing body should seek the assistance of the local government's human resources officer and municipal attorney. In conducting the recruitment in-house, staff can work with the governing body to develop the administrator profile and design an effective and legal recruitment and selection process. Staff can also be responsible for the administrative tasks of placing advertisements, collecting résumés, and scheduling interviews. However, the governing body or its delegated members will approve the selection of the final candidates and conduct the interviews, and, of course, the body as a whole will make the final selection. In this scenario, staff serve as a resource throughout the entire recruitment process.

Outside Expertise Method: Recruitments Conducted with an Outside Party

The governing body can retain an outside party to conduct the recruitment. In some cases the interim or a retired administrator may be asked to coordinate the recruitment process. More often, however, the governing body will contract with a firm that specializes in providing executive search assistance.

When using an executive search firm, the governing body plays an active role in the process. It develops the administrator profile, approves the selection of the applicants, interviews the candidates, and, of course, makes the final selection. The benefit of using an executive search firm is the expertise that the firm brings to the process and its ability to coordinate the recruitment.

Typically the executive search firm begins by meeting with the elected officials either individually or as a group to help them develop the administrator profile. It is the firm's responsibility to facilitate these discussions and help the governing body reach a consensus. After this matter has been settled, the firm coordinates the overall process and assumes responsibility for all tasks until it is time for the elected body to select and interview candidates. During this process, the firm updates the governing body, keeping the members informed of its progress. As the firm will be responsible for all the administrative details, the role of the staff is usually limited to providing information about the local government and coordinating with the firm.

Governing bodies that use an outside service should ensure that a reputable firm, one familiar with the special requirements of local government management, is selected. The experience of the firm should be checked through contact with references—in particular, representatives of local governments that have used its services. Further, the governing body should be fully aware of the costs and benefits when deciding whether to use outside expertise.

Hybrid Method: In-House in Conjunction with Outside Party

In the third alternative, the governing body can conduct the recruitment in-house and supplement the process, where necessary, with assistance from an executive search firm or another outside source, such as an the ICMA Range Rider.

In some cases, the governing body may seek assistance at the beginning of the process to facilitate the discussion, develop the administrator profile, and

determine the structure of the recruitment process. In other cases, local government officials may initiate the process in-house by developing the profile and advertising for the vacancy, and they may then use an outside source to help review résumés, conduct reference checks, and structure the interview process. This alternative may be most appropriate if cost is a concern; however, because it also presents opportunities for lapses in communication, the exact responsibilities of each party must be clarified in a written agreement.

5. Key Elements of the Recruitment Framework

Regardless of the method chosen for conducting the recruitment, the governing body must develop a framework for the recruitment process. It must agree at the outset on a number of key issues critical to the success of the recruitment, including criteria for the administrator profile, compensation range and components, and timing and geographic scope of the search.

Major Decision Point: Development of an Administrator Profile

The most significant decision point for the governing body in the recruitment of a new administrator is to define what the members are looking for—that is, to create the administrator profile. The profile will encompass those qualities, characteristics, experience, and areas of expertise that would be found in an ideal candidate. Only by considering how applicants compare and measure against one another and, of course, against the established criteria, can the governing body be sure that the candidate it appoints has the appropriate combination of work experience, management experience, and leadership style to be successful in the position.

The governing body should begin with a survey of its needs and those of the organization. To determine the needs of the organization, the governing body should invite input from the department directors. Items to be considered include size of the local government, composition of the community, services provided, and overall objectives and priorities of the governing body. The work experience, skills, and expertise of the candidates must relate to these factors. The governing body should also consider both the “nuts-and-bolts” skills and abilities, such as budgeting, human resources, and technological know-how, and the “soft” skills, such as the ability to work with people and to lead an organization. These criteria will form the basis for reviewing résumés, selecting finalists, and making a hiring decision.

Unless the governing body can come to consensus on these criteria, it may be difficult to find the right candidate. By reaching consensus, however, the governing body will be better able to inform the applicants on what it is looking for in a chief administrator.

The ICMA Voluntary Credentialing Program recognizes professional local government managers qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development. For more information, visit www.icma.org/en/icma/members/credentialing.

Developing the administrator profile helps the governing body define its needs and establishes the groundwork for generating a rich pool of applicants with the skills and abilities to address the needs of the governing body, the community, and the organization.

Decision Point: Community Engagement in Administrator Profile

The governing body must decide whether to engage community members or committees in the recruitment process. In most cases, the local government assumes responsibility for the recruitment and conducts the process without involving members of the community.

In some cases, however, a governing body may seek input from community members or committees when developing the administrator profile. This not only allows the community to be part of the process but also may provide the governing body with a better understanding of the role of the administrator. Depending on the method that the governing body uses to conduct the recruitment, gathering input from the community would be facilitated by staff, the outside recruiter, or the elected officials.

Although community input will be valuable, the governing body will ultimately determine the qualities and experiences to be incorporated into the administrator profile, and this should be clearly communicated to the community. It is, after all, to the governing body that the new administrator will be directly reporting.

Governing bodies need to be very alert to the dangers of either hiring a clone of the outgoing administrator, assuming that person is leaving on good terms, or a polar opposite, assuming that person is leaving on less than good terms. The importance of evaluating the current needs of the governing body and locality cannot be overstated.

Major Decision Point: Administrator Compensation

Another critical element to be considered at the outset of the recruitment process is administrator compensation. It is important for the local government to have some general understanding of the acceptable salary range, but it is also important to have some flexibility. Some local governments identify a range; others provide the salary of the current administrator as an indicator; and still others may leave the salary open, to be commensurate with the new hire's background and experience. The governing body will also determine other components of the administrator's compensation, such as deferred compensation, vacation accrual, and professional development allowances.

It is important for the governing body to make clear that it wants the best administrator it can find. In general, potential applicants for the position will want to have some indication of the salary range and compensation package. But that will be only one of many factors that they will use in deciding whether to apply.

ICMA has developed compensation guidelines for negotiating salary and benefits for local government positions. These guidelines are provided in Appendix B and are also available online at www.icma.org/compensationguidelines. The actual compensation package will be negotiated with the final candidate at the conclusion of the recruitment process.

Schedule

Since top candidates often view applying for a new job as a major career decision, it is important that they have adequate time to consider the opportunity, discuss it with their families, and prepare an appropriate résumé. Similarly, the governing body, staff, or executive recruitment firm needs sufficient time to review résumés and conduct reference checks to ensure that good candidates are not overlooked and that finalists meet the desired qualifications. It cannot be overemphasized that the recruitment should move forward expeditiously while also allowing adequate time for a thorough and comprehensive search.

The timing of the recruitment can sometimes be affected by publication deadlines, which are important in terms of properly advertising the vacant position. An ideal timetable would provide **at least sixty days** from the start of the recruitment to the deadline for submitting résumés; **thirty days** to review résumés, conduct background checks, interview candidates, and make a final selection; and **at least thirty days** for the new administrator to relocate. To maximize flexibility in the process, the governing body may advertise the position with an "open until filled" statement.

Profile: Impact of Special Circumstances:

As the governing body decides on the criteria for the administrator profile, three types of situations should receive special consideration:

1. A local government that has just changed its form of government will ordinarily need an administrator who can inspire local government officials with the enthusiasm needed to implement the new structure. A first administrator in a new structure should be adept at public relations and at establishing relationships with incumbent officials and employees.
2. When an administrator has been dismissed or has resigned under pressure, the governing body tends to look for strengths in areas in which the outgoing administrator showed weaknesses. There are dangers, however, in overcompensating for qualities that have led to dissatisfaction. If the outgoing administrator gave too much freedom to subordinates, for example, suddenly changing to a strong disciplinarian might result in antagonisms that would only lead to further problems. Sometimes a new administrator will be confronted with major problems that must be addressed immediately. If such a situation is anticipated, the governing body should make these circumstances known to any applicant who is being seriously considered.
3. When a popular administrator retires or moves to another local government, the governing body may ask for this person's assistance in the search for a successor. However, the governing body should not overlook the possible need for new strengths or different qualities.

Geographic Scope

Another factor to consider in determining the recruitment framework is the geographic scope: should the search be nationwide, statewide, or regional? A broad geographic search may attract more applicants who have demonstrated an ability to manage in a complex urban environment. On the other hand, a focus on the local government's state or region may provide applicants who have a better understanding of and orientation to local problems, legal issues, financing alternatives, and similar matters. In any event, the new administrator will provide a fresh perspective on the issues and challenges facing the community and the organization.

From the applicant's perspective, it is assumed that the local government is looking for the best candidate and that all résumés, regardless of where the applicant currently works, will be reviewed carefully. The determination of the scope of the recruitment will influence the advertising and outreach strategies used.

Advertising and Outreach Strategies

In order to generate a sufficient and diverse pool of qualified applicants, the governing body should develop advertising and outreach strategies.

Advertising Campaign It is to the advantage of the local government to ensure that every professional who might have an interest in the vacant position is aware of the opportunity to apply for it. Therefore, it is important that the advertising campaign be comprehensive and include a carefully worded advertisement. This does not mean, however, that the campaign has to be extensive or expensive. Most local governments, for example, avoid advertising for an administrator in general circulation newspapers unless there is a local requirement to the contrary; this is an expensive form of advertising that does not reach the targeted audience.

More effective vehicles for advertising for chief administrators can be found with organizations that are directly related to local government. In addition to ICMA, the following sources should be considered:

- National League of Cities
- National Association of Counties
- National Association of County Administrators
- National Forum for Black Public Administrators
- International Hispanic Network
- American Society for Public Administration.

Resources at the state level include state municipal leagues, county associations, and municipal assistants organizations. Many of these organizations publish newsletters or magazines and have an online presence; the subscribers to these resources are the men and women in the public administration and local government management professions. Addresses and websites for these resources are listed in Appendix C.

Local governments have some flexibility when preparing and placing advertisements, but at a minimum, the advertisement should include the following:

- Title of the vacant position
- Name of the local government
- Population of the local government
- Amounts of the operating and capital budgets
- Number of full-time employees
- Services provided
- Statement regarding the compensation package
- Filing deadline, including any special items of information desired such as current salary and work-related references
- A brief description of key areas of interest and desirable experience and qualifications (or a reference or email link to the administrator profile)
- Indication of whether residency is required
- A timetable indicating the principal steps and timeframe for the overall recruitment
- Where and to whom to send résumés with a notation as to whether email submittals are acceptable or required
- Website of the local government.

It should be noted that some publications permit the use of display ads that incorporate the local government logo and/or graphics within an innovative format.

In addition to the advertisement, the governing body, through the staff or the executive recruiter, will usually develop a printed brochure that describes the community, the organization, and the position, as well as providing the administrator profile and the governing body's key goals and objectives.

Outreach Strategy While advertising can generate outstanding applicants and the local government should look closely at all received résumés, the governing body should supplement the advertising campaign by identifying an outreach strategy to ensure that the search extends to the widest possible pool of

qualified applicants. The outreach strategy may have a number of approaches for attracting external candidates, encouraging superior internal candidates to apply, and promoting diversity in the applicant pool.

For External Applicants Useful sources of information about potential external candidates include the current administrator, former and retired administrators, members of the local government, local government officials in adjacent communities, executive directors of state leagues, directors of university public administration programs, leaders of regional municipal assistants, and ICMA Range Riders.

When determining an outreach strategy, the governing body, in conjunction with staff or the recruiter, could consider sending letters to identified individuals advising them of the opening and inviting them to send a résumé if they are interested in the position. The correspondence should include a basic package of information describing the local government and the vacant position. For the purposes of confidentiality, all correspondence should either be sent to the applicant's private residence or marked "Personal and Confidential" if sent to the workplace.

Shortly after the letter has been mailed, a follow-up telephone call should be made to confirm that the correspondence was received, assure the recipient that it was not a form letter, indicate why the position may be a good career opportunity, and answer questions. The same deadline for submitting résumés should be used in both the advertisements and the supplemental letters of invitation.

For Internal Applicants The local government should be sure to inform its employees of the vacancy and of how and when to apply. The governing body itself may directly invite one or more employees, such as the assistant city administrator or a department

director, to submit a résumé, or it may do so indirectly through staff or the executive recruiter. Whether in-house applicants are solicited or apply on their own, it is important that they be treated in the same manner as other applicants.

It should be made clear that if an in-house applicant is ultimately selected, it is because the governing body has determined that the candidate was the best choice of all those who applied. While most applicants will receive written notification of their status, the governing body may decide to talk personally with any in-house applicant who was not selected in order to provide good communication with staff, maintain morale, and help ensure an orderly and positive transition.

For Diversity of Applicants Development of a strategy to generate a diverse applicant pool helps to ensure a broad cross-section of candidates. A rich pool with applicants of both sexes and from different races and ethnic backgrounds is beneficial because the chosen candidate will likely bring a different perspective to the organization. Having diversity within a local government can enhance the organization's overall responsiveness to an increasingly more diverse spectrum of residents, improve its relations with surrounding communities, increase its ability to manage change, and expand its creativity.

In addition, the governing body may develop an outreach strategy to encourage the participation of applicants from diverse professional backgrounds. Organizations large and small use executive members of their staff on various levels, and there is often a significant wealth of knowledge to be found among candidates who have had successful careers as assistant city administrators, as department heads, and in other management positions.

6. Key Elements of the Application Process

The application process is the point where effective screening of candidates begins. For this part of the recruitment to be successful, the governing body must proceed carefully and with considerable thought. This section addresses issues such as whether to use a standardized application form; how to provide potential applicants with key information about the position and the local government; and the importance of establishing and maintaining good relations with applicants. High-quality applicants are more likely to pursue the vacancy if the local government can portray itself as a well-run, organized, and efficient organization.

The Application Form

Most local governments prefer to ask applicants to submit a résumé in whatever format the applicant determines will be most effective, rather than a standardized application form. For the applicant, this approach provides flexibility to present past work experience in a way that relates directly to the position in question. At the same time, it permits the local government to see how the applicant organizes and presents material in a written format. The manner in which materials are prepared can be an indication of real interest in the position.

A standardized application form is not recommended in recruitments for the governing body's top administrative professional. If one is used, however, it should be easy to complete, and the information requested should be relevant to the vacant position. Regardless of the form of application, the applicant should be required to submit a cover letter and résumé.

The Local Government Information Packet

Serious applicants will not submit a résumé for consideration until they have done their homework and have satisfied themselves that the position represents a good career opportunity. Often they will seek information from local government officials about the community, the organization, and the position.

This is one of the first contacts that will form an impression of the local government on the potential applicant. If the impression created is that the

Two critical elements of applicant relations are important to stress: keeping the candidates informed of the status of the process and maintaining confidentiality.

recruitment is well organized, that the local government officials know what they are looking for and are consistent in the message, and that sufficient information about the locality is easily obtained, potential applicants are more likely to form a positive image of the position and the governing body in deciding whether to apply.

To help disseminate the same information to all applicants, the governing body could put together a packet of information that includes:

1. A copy of the outreach brochure or other documents that provide the criteria for the position, indicating key objectives and priorities and the administrator profile
2. Ordinance or charter requirements if they contain significant or unusual provisions regarding the position
3. Summary information about the local government, including organizational structure, personnel practices, number of employees, services provided, and budget data
4. Information about the community in the form of a chamber of commerce brochure or similar publication, if such is attractively prepared and available
5. Websites that contain information on the local government and community
6. The name, phone number, and e-mail address of a contact person.

Applicant Relations

Appendix E in this handbook provides some basic do's and don'ts regarding applicant relations and the recruitment process. The two key areas that are important to stress are candidate status notification and confidentiality.

There is no faster way to damage the image of the local government and to lose good applicants than to violate the trust or assurance that was given regarding confidentiality.

Candidate Status Notification As a rule, it is important to engage in the simple and courteous steps of acknowledging résumés as they are received and of notifying applicants of their status as the recruitment proceeds. Prompt acknowledgment of résumés is one indication that the process is being handled in a businesslike manner, and it can add to the applicant's positive impression of the organization. This acknowledgment also should inform the applicant of the recruitment timetable. Unless there are unusual or unanticipated delays, this response should be sufficient until applicants are actually notified as to their final status. To maintain confidentiality, all correspondence should be directed to the applicant's home, not business address.

Additionally, if special circumstances arise (such as a recall election) that might cause a delay in either the recruitment or the selection process, it is important to communicate any changes in the established schedule to all applicants.

Similarly, notifying all applicants as to their status, even if they are not selected as finalists, is a basic courtesy that will affect how the candidate views the local government.

Maintaining Confidentiality Confidentiality is an important consideration in any recruitment. Present job security and long-term career opportunities could

be jeopardized if an applicant's interest in another position is made public prematurely. While applicants realize that the local government will want to contact their current employers to conduct background checks and assess their job performance, they typically prefer to wait until it is clear that they are going to be considered as finalists who will be invited to the second interviews for the position.

The governing body should determine, at the outset, the extent to which the recruitment process will be confidential. The governing body, in consultation with the local government's attorney, should decide the level of confidentiality due to the varying open record and disclosure statutes between the states. If applicants' names are likely to be disclosed at any point, potential applicants should be advised so that they may take it into account in deciding whether to pursue the vacancy.

From a recruiting standpoint, assurance of confidentiality will result in more applications being submitted, particularly from those who are currently employed elsewhere. As confidentiality is important to both parties, such assurances should be honored, and applicants should be given adequate time to notify their current employers before those employers are contacted by the recruiting local government.

7. The Role of the Media in the Recruitment Process

Members of the media will obviously have an interest in the recruitment process and their involvement will be dictated in part by state law and in part by tradition. At the outset, local government officials should brief the media on the timing and steps involved in the overall process. After the deadline has passed for submitting résumés, the governing body may decide to brief the media and the community on the overall response.

As the confidentiality of résumés is a major concern in any recruitment and can significantly affect the number and quality of résumés received, applicants should be apprised of any applicable state laws in this area, and the governing body, with advice from the local government's attorney, should determine what information will and will not be made available to the media.

8. The Selection Process

Once the deadline for submitting résumés has passed and all applications have been received, the selection process begins. Principal steps are as follows:

- Reviewing the applications
- Determining which candidates will be interviewed
- Interviewing the candidates
- Making the final selection.

Reviewing the Applications

The selection process begins with a review of the applications and résumés that have been submitted. Depending on how the governing body has chosen to conduct the recruitment, the participants involved in this initial review may be the body as a whole, the chief elected officer, a subcommittee of the governing body, the staff, or the executive recruitment firm. Alternatively, some local governments have used a panel of chief administrators from other local governments to serve as a screening panel. Regardless of who performs the screening, the objective of the initial review is to identify those candidates who best reflect the qualities, characteristics, experience, and areas of expertise that were defined in the administrator profile.

Major Decision Point: Determining the Candidates to Be Interviewed

The determination of the candidates to be interviewed is a significant decision point in the selection process. The objective here is to narrow the total group of applicants to a smaller group that will continue to the next step.

Initial Background Check After the group of applicants has been narrowed down to those who meet the qualifications described in the administrator profile, the list may be further refined by confirming educational credentials and conducting online checks. Such reviews should not violate the confidentiality of the applicant pool. For online checks, it is important to consider the source and avoid drawing hasty conclusions from these sources.

Selection of Candidates After the review of the résumés and the initial background check, the participants in this process should meet with the governing body as a whole to recommend which applicants should be invited to an interview. The chosen group of candidates should be large enough to expose the governing body to an array of personalities. In most cases, **five to ten candidates** should be selected. The governing body may also establish a secondary list of candidates who could be invited to the interview if one or more of the first group of candidates decline or are unable to continue with the process.

Informing the Candidates Once candidates have been selected, the governing body representative, the staff, or the executive recruiter should contact the each candidate by phone and do the following:

1. Inform the candidate that he or she has been selected to be interviewed and offer congratulations (the candidate should be made to feel that the governing body is pleased to have reviewed his or her résumé). At the same time, confirm the candidate's continuing interest in the position.
2. Advise the candidate of: the nature of the interview process, including date and time, number of other candidates, whether there are any in-house candidates, and when a decision is expected to be made. Indicate that all the details and information will be confirmed in a written correspondence. If email is to be used for this correspondence, confirm the candidate's email address.
3. As described in the section on applicant relations, the governing body should have already determined the extent to which the recruitment process will be confidential. At this point, the candidate should be advised if the names of candidates are to be made public and be given the opportunity to withdraw.
4. Confirm that the candidate has received the information package provided during the application process. Indicate that a supplemental package with more detailed information will be provided directly to the candidate's home in advance of the interview. The supplemental package may include:

- A list of governing body members and their occupations
- Copies of meeting minutes from the past several months
- The general or comprehensive plan and land use maps
- The most recent budget
- A recent bond prospectus
- Any other material that would be of particular relevance, given the goals and objectives of the local government and the criteria for the position.

As an alternative to a paper package of information, the candidates can be directed to the locality's website for such information.

5. Confirm local government policy on reimbursement of expenses incurred in conjunction with the interview. Many local governments reimburse candidates for all out-of-pocket expenses, including reasonable transportation, room, and board. ("Reasonable" is intended to eliminate first-class airline tickets, four-star hotels, and gourmet restaurants.)

Such reimbursement of expenses is another way that the local government can demonstrate its interest in the candidate. It reinforces the positive nature of the recruitment process and is sometimes a factor in whether the candidate is able to attend. Should there be strong reluctance on the part of the governing body to reimburse all expenses, the local government can share expenses with the candidate or can agree to reimburse all expenses incurred after the first trip.

The local government staff can offer to handle all reservations, transportation, and related matters, but this can be cumbersome and time-consuming. In most cases, the local government confirms the time and place and lets the candidate make his or her own arrangements. The candidates usually prefer this approach as well.

Interviewing the Candidates

Most local governments use the interview approach for selecting the chief administrator. In this approach, the governing body will meet as a whole with each individual candidate. As the initial interview is usually limited to an hour, a second interview with one or more of the finalists is generally incorporated into the process.

Initial Interview The following provides important guidelines for conducting the initial interview.

Structure of the Interview The interview process should be well organized in a comfortable setting for both parties that invites open and relaxed discussions. This element of the process is generally not considered a public meeting, although the governing body, staff, or executive recruiter should consult with the city's legal advisor to ensure that all requisite notices are sent and other legal requirements are met.

All members of the governing body should participate in the interview with one member, usually the chair, designated as the discussion leader. This interview should last at least an hour as it is difficult to pursue a range of questions in less time. Further, all candidates anticipate and deserve an opportunity to present their qualifications to the governing body and describe their interest in the position. It is important to realize that the interview process not only provides the governing body with an opportunity to improve its knowledge of the candidate but also influences the candidate's interest in the position.

As part of the initial interview, the governing body may want to include a comprehensive tour of the community. A trusted senior staff person would be a likely tour guide.

Content of the Interview Questions During the first interview, the governing body will question the candidate about a variety of matters, such as overall work experience, specific accomplishments, career objectives, alternative approaches to practical problems faced by the local government, and similar matters. A list of potential questions is provided in Appendix D.

The interview also gives the candidate an opportunity to evaluate the governing body as a group and to ask questions. An important issue to discuss during the interview is the governing body's working relationship with the administrator, clarifying all roles and responsibilities.

During the formal and any informal meetings between the governing body and the candidates, discussions and questions should focus on the criteria for the position that were established at the outset of the recruiting process. Obviously, discussions should stay within acceptable legal parameters and should not include references to politics, religion, age, racial origin, and sexual preferences.

When the initial interview process is over, the governing body should avoid impulsive action but rather take whatever time is necessary to arrive at a comfortable and well-reasoned decision. At this point, either one person has emerged as the clear choice of the

governing body; or, more likely, the pool of candidates has been narrowed down to two or three individuals that the governing body would like to further pursue. In most cases, the process will involve a second interview of this smaller group of finalists. However, if there is one clear choice, please refer to the section entitled “Making the Final Selection.”

Second Interview If, after the initial interview, there are two or three candidates that the governing body would like to further consider, a couple of options exist for setting up a second interview:

1. The governing body may invite the finalists back for a second, more in-depth interview, coupled perhaps with some sort of community function. This arrangement often provides the governing body with the insight needed to make a final decision.
2. The governing body may invite the finalists back for a second, more in-depth interview, coupled with an opportunity for community leaders and/or staff to provide input into the selection of the chief administrator.

In either case, finalists should be notified of their status, congratulated for being among the select few who will be further considered, informed of the process, and asked for permission for the governing body to conduct reference checks.

Reference Checks As the governing body is now deciding between two or three qualified candidates, it is important at this point to conduct reference checks that provide additional information on which to base the decision. References should be checked to learn about each finalist’s ability to work effectively with people, to develop a more complete understanding of the finalist’s work experience and specific accomplishments, and to see if the finalist’s qualifications match the profile for the position. The following suggestions are important for ensuring consistency and thoroughness when conducting reference checks:

- The reference checks may be performed by members of the governing body, staff, or executive recruitment firm. In general, however, it is advisable to limit the number of people performing the checks to one or two. It may be difficult, depending on the number of candidates, to have one person perform all the reference checks, especially if there are three references for each candidate. Further, it can be helpful if two people compare notes on the same candidates.

- Be consistent in discussing issues with and asking questions of each candidate in order to provide a good basis for comparison.
- Contact enough people to ensure a consistent reading as to the candidate’s strengths and weaknesses. If a reference can say only good things about the candidate, he or she should be asked directly what weaknesses the candidate has.

Decision Point: Inviting the Candidate’s Spouse/ Partner

While the focus of the recruitment is on the chief administrator, the governing body may formally invite the candidate’s spouse/partner to the community during the interview process. Generally, this type of invitation occurs only after the first interview process has narrowed the group of candidates down to the top two or three. The spouse/partner should never be included in the formal interview process, nor made to feel as if he or she is being interrogated in any way.

If the governing body formally invites the spouse/partner to accompany the candidate, it is important that this part of the process be as well organized as all the other parts that concern the candidate directly. Here, too, an important impression about the community is being made. The interests of the spouse/partner should be carefully determined and accommodated.

On the other hand, the governing body may use an informal, non-structured approach to the involvement of the spouse/partner. Understanding that a candidate may bring his or her spouse/partner along to explore the community as a possible future home, the governing body may consider having a packet of relevant community information available.

Decision Point: Community Involvement The governing body must decide whether to involve community members or committees in the interview process. In most cases, the local government assumes responsibility for the interviews and conducts the process of selecting the new chief administrator without the involvement of members of the community.

In some cases, however, governing bodies have chosen to supplement the usual discussion between members and finalists by inviting community leaders to participate. For example, finalists may meet with selected community leaders to answer questions and receive their input on matters they consider important to the local government. If this option is taken, the purpose of the meeting should be made clear to all involved. Both the finalist and the community members should know whether these meetings are intended simply to provide the

finalist with additional information on the local government or whether the community group will also be involved in the actual selection process. In the latter case, although the input from the community will be valuable, it should be made clear that the governing body will make the final selection based upon a variety of factors.

Decision Point: Staff Involvement The governing body must also decide whether to involve staff members in the interview process. It may choose to supplement the usual discussion between members and finalists by inviting staff members to participate. For example, finalists may meet with selected department directors to answer questions and review departmental operations in more detail.

If this option is taken, its purpose should be made clear to all involved. Both the finalist and the staff members should know whether these meetings are intended simply to provide the finalist with additional information on the local government or whether the group will also be involved in the selection process. In the latter case, although the input from the staff will be valuable, it should be made clear that the governing body will make the final selection based upon a variety of factors.

Major Decision Point: Making the Final Selection

After the second interviews, there should be one person who is the clear first choice of the majority, if not all, of the governing body. It is important to both the governing body and the potential new hire that the decision be unanimous, if possible. A unanimous vote from the governing body demonstrates a commitment of support to the new chief administrator and sends a positive message to both the organization and the community. If the governing body is divided on the appointment and the decision is not unanimous, however, the chosen finalist should be advised of this prior to accepting the position.

Once the selection has been made, the governing body, staff, or executive recruiter should contact the

It is important that the vote for the new chief administrator be unanimous, if possible. This sends a positive message to the organization and the community.

finalist, confirm his or her willingness to accept the position, and obtain permission to conduct a very thorough background check, which will be performed by an outside party. This process includes interviews with individuals in the candidate's current community, an investigation into possible criminal history, and a credit check, which requires the candidate's consent.

Another element of this final selection process may include some or all of the members of the governing body making an on-site visit to the finalist's current community. Often finalists insist that an agreement regarding terms and conditions of employment be agreed upon before being open to a site visit.

Once the governing body is satisfied with the results of that process, it may inform the finalist and move ahead to put together a total compensation package and discuss other related arrangements. However, if the governing body is unable to satisfactorily conclude negotiations with its first choice, it may need to engage in discussions with one of the other finalists. Thus, it should refrain from notifying the other finalists until all arrangements have been finalized with the first-choice candidate.

From a public image standpoint, it is imperative that all candidates learn about the final selection from the governing body or its representative, as opposed to hearing about it from a third party or reading about it online or in a newsletter or professional publication. A representative from the governing body, staff, or executive recruitment firm should personally contact the runners-up prior to or at the same time that a news release about the appointment is issued.

9. The Negotiation Process

Once the local government has made its decision and the finalist has indicated a willingness to serve as the chief administrator, a number of final arrangements must be completed. These include negotiating a compensation package and completing transition activities. Only after these arrangements are concluded can the new chief administrator relocate and begin work for the community.

Preparation for Negotiation

The governing body needs to ensure that relations with the new administrator get off to a good start. At this point, nothing should happen that causes the new administrator to reconsider.

It is important that the governing body identify a single individual to act as the negotiator for the local government. Depending on the approach that the governing body has selected, the negotiator may be a member of the governing body; a member of the staff, such as the interim chief administrator or the municipal attorney; or the executive recruiter. The following are important guidelines regarding the structure of the negotiations:

1. The atmosphere should be friendly and relaxed.
2. The negotiator should be flexible. Negotiating implies a willingness to consider options and alternatives in pursuit of an acceptable package. There may well be more than one way to meet the financial objectives of the new administrator.
3. The governing body should be realistic. No matter how beautiful and desirable the community or position may be, the finalist is unlikely to accept the new position without an increase in pay over his or her present salary.

Major Decision Point: Negotiating Compensation

In compensation negotiations, base salary is a good place to start. The ICMA Compensation Guidelines, which are provided in Appendix B, are a good source of information to help with this part of the process. The person conducting the negotiation on behalf of the local government should keep the following questions in mind:

The governing body should rely on a single individual to handle its part of the negotiation process.

The process should be friendly and relaxed; the negotiator should be flexible; and the governing body should be realistic in its guidelines to the negotiator.

1. Ultimately, what salary will be acceptable to the governing body?
2. What is the bargaining range?
3. What is the current salary of the applicant?
4. What type of salary and total compensation package did the candidate discuss during the interview?

ICMA, the National Association of Counties, and state leagues of cities and counties are sources of information on the salaries of local government administrators around the country. Prior to initiating negotiations, the governing body should compare its salary range with that of other governing bodies in same region of the country.

Elements of Total Compensation Elements of a total compensation package typically include:

- Base salary
- Deferred compensation
- Severance pay
- Use of government car or car allowance
- Use of technology or technology allowance
- Retirement plan
- Medical and other insurance (dental, optical, life, disability)
- Vacation accrual
- Holidays
- Sick leave accrual
- Membership dues, conference, and professional development attendance fees.

Before the negotiation begins, the governing body should ask the candidate to provide a written itemization of his or her current total compensation. After receiving this information, the person negotiating on behalf of the governing body should outline a proposed package and provide it to the candidate. Usually there will be no negotiation on those benefits that are similar among local governments, such as medical insurance and holidays. The variables most often relate to base salary and particular financial objectives, such as deferred compensation, health insurance, and requirements to join a state retirement system.

The proposed compensation package should

- (1) leave the individual whole on basic benefits,
- (2) provide an appropriate step forward in cash-related benefits,
- (3) ensure an increase in take-home pay, and
- (4) deal with any particular financial objectives that the new administrator may have.

Noncompensation Elements During the negotiations, some issues will arise that do not relate to the total compensation package but may well have significant financial implications for both the local government and the new administrator. Both parties need to be flexible and realistic in dealing with these issues:

- **Relocation expenses:** It is common for local governments to pay the one-time cost of relocating the administrator and his or her family and household furnishings to the new local government. Sometimes both parties agree on a “not-to-exceed” figure based on estimates from moving companies.
- **Temporary housing:** An allowance for temporary housing is usually provided until the new administrator is able to sell his or her former home and/or relocate his or her family. Typically, this amount is sufficient to cover the cost of a modern furnished apartment or condominium. Again, both parties may agree to a fixed time period or amount.
- **Commuting expenses:** As with temporary housing, the local government often will agree to reimburse the administrator for periodic family visits or for the spouse/partner to visit for house-hunting purposes.
- **Housing assistance:** Regional variations in the cost of housing or housing financing can complicate the negotiations. There is considerable precedent

for local governments—using appropriate safeguards and limits—to assist in the purchase and/or financing of housing for the new administrator. A variety of options exist, including a loan or a salary supplement.

Employment Agreements It is in the interests of both the community and the chief administrator to have a written summary of the terms and conditions of employment to which both parties have agreed. The stable working situation created by such an agreement helps to attract and keep top-flight administrators in a generally mobile profession. ICMA recommends the use of employment agreements because the detailing of salary, benefits, and other conditions of the administrator’s job puts those items where they belong—in a contract where both parties can know what is expected—and removes them from the daily agenda of the chief administrator and members of the governing body.

While such an agreement usually does not refer to a specific term of employment and permits either the governing body or the chief administrator to terminate for cause or at will, it should include a section providing the administrator with severance pay for a fixed period of time if he or she is terminated. This provides important personal and professional security for local government chief administrators, as they have the rather unique situation of working at the pleasure of the governing body with the possibility of dismissal for any reason at any time.

While not a lengthy legal document, the employment agreement is usually drafted by the local government’s attorney. The new administrator is often given an opportunity to prepare a first draft for consideration. If an employment agreement is not used, a formal letter of understanding, at a minimum, should be prepared.

As a final note on this process, the governing body should be prepared for the possibility that it will be unable to reach agreement on compensation or other matters with the first-choice candidate. In these instances, the governing body typically enters into negotiations with its second-choice candidate. As indicated previously, once an agreement has been finalized, all other candidates should be promptly notified that they were not selected.

10. The Transition Process

After the governing body and new chief administrator have reached agreement on the issues of compensation, starting date, and method and timing of announcing the selection to both the community and the administrator's former local government, the transition process begins.

Announcing the Selection

The announcement of the selection should be well planned and coordinated between the governing body and new chief administrator. Two factors should precede any formal announcement of the appointment:

- The successful candidate has formally accepted the position and the negotiations have been concluded; and
- The successful candidate has been given the opportunity to notify his or her current governing body about the appointment.

This public announcement should be coordinated carefully to recognize the instantaneous nature of electronic communication.

Additional Elements

Additional elements that the governing body may employ to ensure a smooth transition for the new chief administrator are as follows:

- **General assistance:** For a smooth transition, the local government should offer whatever general assistance the new administrator might need in moving, such as introductions to realtors and

bankers and support to the spouse/partner in finding suitable employment.

- **Orientation meetings:** The governing body should arrange to introduce the new chief administrator to department heads and local government staff. While the new administrator may have met some of these individuals during the interview process, a special meeting or reception can be a pleasant way to turn over responsibility. Similar meetings, briefing sessions, and/or receptions can be arranged to introduce the new administrator and his or her family to community groups, civic leaders, and residents in general.
- **Local government work session, orientation, and review of objectives:** It is desirable to have an initial work session with the new administrator to discuss and clarify initial expectations on both sides and to review goals and objectives. Even though some of these issues may have been raised during the interview process, communication from the outset can help ensure a smooth working relationship.
- **Performance evaluation:** Using the position's goals and objectives as a starting point, the governing body and new chief administrator should agree to an annual or semiannual review of the administrator's performance. This established and formal process helps to ensure that communication between the parties is maintained, that progress is monitored, and that goals and objectives are reviewed and refined on a regular basis.

11. Conclusion

Choosing a chief administrator can be the most significant action of the governing body. The chief administrator is a leader, coach, and chief of strategy for the staff team whose job it is to implement a vision, policy, and procedures; accomplish goals; and achieve the desired output of the organization. Similar to a chief executive officer of a Fortune 500 company, the chief administrator is also responsible for serving an elected governing body, managing the financial aspects of the organization, directing the employees, ensuring quality customer service, and implementing legal and ethical standards. Furthermore, unique to public agencies, the chief administrator oversees an organization that is focused on providing a variety of services to the community rather than on making a profit.

In addition to a very diversified portfolio of services that must be provided and interests that must be served fairly, the chief administrator is responsible for an organization that must balance its budget; provide for and encourage public input into decision making; and understand, respect, and appreciate the political environment. In summary, the position of chief administrator requires a variety of skill sets—not every person is capable of performing the role. Therefore,

selecting the right person for the job is critical for the governing body and for the community.

This guidebook addresses a number of factors to consider in recruiting, selecting, negotiating, and hiring a professional local government manager. In doing so, it elaborates on the “best practices” for identifying the appropriate skills and background of a chief administrator, noting that the governing body must identify the qualities, characteristics, experience, and areas of expertise that would be found in the ideal candidate. Throughout the entire process, clear communication to staff, the community, and the media is essential for achieving the governing body’s goals. In the end, the process of recruiting and selecting a chief administrator should be a positive and unifying experience, resulting in the appointment of an individual who represents and embodies the governing body’s vision for the future.

ICMA and its members are resources available for providing guidance and recommendations in the recruitment of a chief administrator. With this document, we hope we have provided a basic understanding of the process involved in selecting a professional local government manager who meets the needs of the community.

Appendix A

ICMA Code of Ethics with Guidelines

The ICMA Code of Ethics was adopted by the ICMA membership in 1924, and most recently amended by the membership in May 1998. The Guidelines for the Code were adopted by the ICMA Executive Board in 1972, and most recently revised in July 2004.

The mission of ICMA is to create excellence in local governance by developing and fostering professional local government management worldwide. To further this mission, certain principles, as enforced by the Rules of Procedure, shall govern the conduct of every member of ICMA, who shall:

1. Be dedicated to the concepts of effective and democratic local government by responsible elected officials and believe that professional general management is essential to the achievement of this objective.
2. Affirm the dignity and worth of the services rendered by government and maintain a constructive, creative, and practical attitude toward local government affairs and a deep sense of social responsibility as a trusted public servant.

Guideline

Advice to Officials of Other Local Governments. When members advise and respond to inquiries from elected or appointed officials of other local governments, they should inform the administrators of those communities.

3. Be dedicated to the highest ideals of honor and integrity in all public and personal relationships in order that the member may merit the respect and confidence of the elected officials, of other officials and employees, and of the public.

Guidelines

Public Confidence. Members should conduct themselves so as to maintain public confidence in their profession, their local government, and in their performance of the public trust.

Impression of Influence. Members should conduct their official and personal affairs in such a manner as to give the clear impression that they cannot be improperly influenced in the performance of their official duties.

Appointment Commitment. Members who accept an appointment to a position should not fail to report for that position. This does not preclude the possibility of

a member considering several offers or seeking several positions at the same time, but once a *bona fide* offer of a position has been accepted, that commitment should be honored. Oral acceptance of an employment offer is considered binding unless the employer makes fundamental changes in terms of employment.

Credentials. An application for employment or for ICMA's Voluntary Credentialing Program should be complete and accurate as to all pertinent details of education, experience, and personal history. Members should recognize that both omissions and inaccuracies must be avoided.

Professional Respect. Members seeking a management position should show professional respect for persons formerly holding the position or for others who might be applying for the same position. Professional respect does not preclude honest differences of opinion; it does preclude attacking a person's motives or integrity in order to be appointed to a position.

Reporting Ethics Violations. When becoming aware of a possible violation of the ICMA Code of Ethics, members are encouraged to report the matter to ICMA. In reporting the matter, members may choose to go on record as the complainant or report the matter on a confidential basis.

Confidentiality. Members should not discuss or divulge information with anyone about pending or completed ethics cases, except as specifically authorized by the Rules of Procedure for Enforcement of the Code of Ethics.

Seeking Employment. Members should not seek employment for a position having an incumbent administrator who has not resigned or been officially informed that his or her services are to be terminated.

4. Recognize that the chief function of local government at all times is to serve the best interests of all of the people.

Guideline

Length of Service. A minimum of two years generally is considered necessary in order to render a professional service to the local government. A short tenure should be the exception rather than a recurring experience. However, under special circumstances, it may be in the best interests of the local government and the member to separate in a shorter time. Examples of such circumstances would include refusal of the appointing authority to honor commitments concerning conditions of employment, a vote of no confidence in the member, or severe personal problems. It is the responsibility of an applicant for a position to ascertain conditions of employment. Inadequately determining terms of employment prior to arrival does not justify premature termination.

5. Submit policy proposals to elected officials; provide them with facts and advice on matters of policy as a basis for making decisions and setting community goals; and uphold and implement local government policies adopted by elected officials.

Guideline

Conflicting Roles. Members who serve multiple roles—working as both city attorney and city manager for the same community, for example—should avoid participating in matters that create the appearance of a conflict of interest. They should disclose the potential conflict to the governing body so that other opinions may be solicited.

6. Recognize that elected representatives of the people are entitled to the credit for the establishment of local government policies; responsibility for policy execution rests with the members.
7. Refrain from all political activities which undermine public confidence in professional administrators. Refrain from participation in the election of the members of the employing legislative body.

Guidelines

Elections of the Governing body. Members should maintain a reputation for serving equally and impartially all members of the governing body of the local government they serve, regardless of party. To this end, they should not engage in active participation in the election campaign on behalf of or in opposition to candidates for the governing body.

Elections of Elected Executives. Members should not engage in the election campaign of any candidate for mayor or elected county executive.

Running for Office. Members shall not run for elected office or become involved in political activities related to running for elected office. They shall not seek political endorsements, financial contributions or engage in other campaign activities.

Elections. Members share with their fellow citizens the right and responsibility to vote and to voice their opinion on public issues. However, in order not to impair their effectiveness on behalf of the local governments they serve, they shall not participate in political activities to support the candidacy of individuals running for any city, county, special district, school, state or federal offices. Specifically, they shall not endorse candidates, make financial contributions, sign or circulate petitions, or participate in fund-raising activities for individuals seeking or holding elected office.

Elections in the Council-Manager Plan. Members may assist in preparing and presenting materials that explain the council-manager form of government to the public prior to an election on the use of the plan. If assistance is required by another community, members may respond. All activities regarding ballot issues should be conducted within local regulations and in a professional manner.

Presentation of Issues. Members may assist the governing body in presenting issues involved in referenda such as bond issues, annexations, and similar matters.

8. Make it a duty continually to improve the member's professional ability and to develop the competence of associates in the use of management techniques.

Guidelines

Self-Assessment. Each member should assess his or her professional skills and abilities on a periodic basis.

Professional Development. Each member should commit at least 40 hours per year to professional development activities that are based on the practices identified by the members of ICMA.

9. Keep the community informed on local government affairs; encourage communication between the citizens and all local government officers; emphasize friendly and courteous service to the public; and seek to improve the quality and image of public service.

10. Resist any encroachment on professional responsibilities, believing the member should be free to carry out official policies without interference, and handle each problem without discrimination on the basis of principle and justice.

Guideline

Information Sharing. The member should openly share information with the governing body while diligently carrying out the member's responsibilities as set forth in the charter or enabling legislation.

11. Handle all matters of personnel on the basis of merit so that fairness and impartiality govern a member's decisions, pertaining to appointments, pay adjustments, promotions, and discipline.

Guideline

Equal Opportunity. All decisions pertaining to appointments, pay adjustments, promotions, and discipline should prohibit discrimination because of race, color, religion, sex, national origin, sexual orientation, political affiliation, disability, age, or marital status.

It should be the members' personal and professional responsibility to actively recruit and hire a diverse staff throughout their organizations.

12. Seek no favor; believe that personal aggrandizement or profit secured by confidential information or by misuse of public time is dishonest.

Guidelines

Gifts. Members should not directly or indirectly solicit any gift or accept or receive any gift--whether it be money, services, loan, travel, entertainment, hospitality, promise, or any other form--under the following circumstances: (1) it could be reasonably inferred or expected that the gift was intended to influence them in the performance of their official duties; or (2) the gift was intended to serve as a reward for any official action on their part.

It is important that the prohibition of unsolicited gifts be limited to circumstances related to improper influence. In *de minimus* situations, such as meal checks, some modest maximum dollar value should be determined by the member as a guideline. The guideline is not intended to isolate members from normal social practices where gifts among friends, associates, and relatives are appropriate for certain occasions.

Investments in Conflict with Official Duties. Member should not invest or hold any investment, directly or

indirectly, in any financial business, commercial, or other private transaction that creates a conflict with their official duties.

In the case of real estate, the potential use of confidential information and knowledge to further a member's personal interest requires special consideration. This guideline recognizes that members' official actions and decisions can be influenced if there is a conflict with personal investments. Purchases and sales which might be interpreted as speculation for quick profit ought to be avoided (see the guideline on "Confidential Information").

Because personal investments may prejudice or may appear to influence official actions and decisions, members may, in concert with their governing body, provide for disclosure of such investments prior to accepting their position as local government administrator or prior to any official action by the governing body that may affect such investments.

Personal Relationships. Member should disclose any personal relationship to the governing body in any instance where there could be the appearance of a conflict of interest. For example, if the manager's spouse works for a developer doing business with the local government, that fact should be disclosed.

Confidential Information. Members should not disclose to others, or use to further their personal interest, confidential information acquired by them in the course of their official duties.

Private Employment. Members should not engage in, solicit, negotiate for, or promise to accept private employment, nor should they render services for private interests or conduct a private business when such employment, service, or business creates a conflict with or impairs the proper discharge of their official duties.

Teaching, lecturing, writing, or consulting are typical activities that may not involve conflict of interest, or impair the proper discharge of their official duties. Prior notification of the appointing authority is appropriate in all cases of outside employment.

Representation. Members should not represent any outside interest before any agency, whether public or private, except with the authorization of or at the direction of the appointing authority they serve.

Endorsements. Members should not endorse commercial products or services by agreeing to use their photograph, endorsement, or quotation in paid or other commercial advertisements, whether or not for compensation. Members may, however, agree to endorse the

following, provided they do not receive any compensation: (1) books or other publications; (2) professional development or educational services provided by non-profit membership organizations or recognized educational institutions; (3) products and/or services in which the local government has a direct economic interest.

Members' observations, opinions, and analyses of commercial products used or tested by their local governments are appropriate and useful to the profession when included as part of professional articles and reports.

ICMA Guidelines for Compensation

Maintaining public trust and integrity in local government requires both effective governance and management of the organization. The following guidelines are intended to establish a best practice for establishing and negotiating compensation for local government executives and staff and to clarify the roles and responsibilities of the governing body, local government manager, and employee.

The Principles

Compensation and personnel matters should be guided by the core principles of the ICMA Code of Ethics. ICMA affirms that the standard practice for establishing the compensation of local government managers be fair, reasonable, transparent, and based on comparable public salaries nationally and regionally. ICMA members should act with integrity in all personal and professional matters in order to merit the trust of elected officials, the public and employees. Local government managers have an ethical responsibility to be clear about what is being requested and to avoid excessive compensation.

Elected officials perform a critical governance role providing oversight of the management of the organization. To that end, they must be engaged in establishing the process for determining the compensation for all executives appointed by the governing body.

Compensation should be based on the position requirements, the complexity of the job reflected in the composition of the organization and community, the leadership needed, labor market conditions, cost of living in the community, and the organization's ability to pay.

The Process for Negotiating Executive Compensation

To establish fair and reasonable compensation, the governing body operating as a committee of the whole or as a designated evaluation and compensation subcommittee, should design and implement the methodology for setting the compensation of the local government manager and any other appointees of the governing body.

Compensation benchmarks should be established based on comparable local government or public sector agencies.

The governing body should engage experts whether contracted or in house as necessary to provide the information required to establish fair and reasonable compensation levels.

All decisions on compensation and benefits must be made by the entire governing body in a public meeting.

Compensation Guidelines for Local Government Executives

A starting point for the elected officials and local government manager in any salary negotiation should be to

1. Determine the requirements of the job and the experience needed to successfully perform the job duties.
2. Examine market conditions to learn what comparable public sector executives earn. A best practice would be to gather information using pre-determined comparable benchmark local governments or public sector agencies.
3. Understand the services provided by the local government along with the nature of the current issues in the organization and in the community, and then compare these with the individual's expertise and proven ability to resolve those issues.
4. Identify the local government's current financial position, its ability to pay, and the existing policies toward compensation relative to market conditions.
5. Weigh factors such as the individual's credentials, experience and expertise when setting salary.
6. Consider additional compensation in areas where the cost of living is high and the governing body wants the manager to reside within the community. In addition, other unique and special circumstances may be taken into consideration, such as difficult recruitment markets and the particularly challenging needs of the public agency.
7. Seek legal advice as needed and appropriate during periods prior to the beginning of employment when terms and conditions are being negotiated and finalized.

Severance

Severance provisions established in the employment agreement must be both reasonable and affordable so that the cost of the severance is not an impediment to fulfilling the governing body's right to terminate a manager's service, if desired, but is consistent with the role and expectations of the position. The ICMA Model Employment Agreement (see Appendix F) recommends a one year severance but recognizes that the length of service with an organization may justify a higher severance.

Compensation Changes

1. Benefits and salary increases should be reasonably comparable to those that local government executives receive within the designated benchmark or regional market area and generally consistent with other employees.
2. Merit adjustments or bonuses should be contingent upon performance and the overall financial position of the local government to afford additional compensation payments. Provisions regarding consideration of periodic merit adjustments in salary should be pre-determined.
3. Local government managers must recognize and effectively manage conflicts of interest inherent in compensation changes. Managers should avoid taking steps regarding pension and other benefits where they will be the sole or primary beneficiary of the change. Examples include:
 - Dramatically increasing salary thereby leading to pension spiking.
 - Recommending or implementing single highest year to determine retirement benefits
4. An individual should receive a single salary that recognizes all duties and responsibilities assigned rather than different salaries for different assignments.
5. Local government managers should not put their personal compensation interests before the good of the overall organization and that of the citizens.

Transparency

1. Local government managers should provide their total compensation package to the governing body

when requesting compensation changes so that the governing body has a comprehensive view of the compensation package.

2. In the interest of fairness and transparency, there should be full disclosure to the governing body, prior to formal consideration and approval, of the potential cost of any benefit changes negotiated during employment.
3. When the terms and conditions of employment are being renegotiated with the employer and at the end when the employment is being terminated, ICMA members have a duty to advise the elected officials to seek legal advice.
4. In the interests of transparency, the salary plan and salary ranges for local government positions, including that of the manager, should be publicly accessible on the agency's website.

General Compensation Guidelines for All Employees

1. Each local government should establish benchmark agencies, which are determined using set criteria such as, but not limited to,
 - Geographic proximity
 - Similarity with regard to the nature of the services provided
 - Similarity in employer size/population size
 - Similarity in the socioeconomic makeup of the population
 - Other similar employers in the immediate area.
2. The local government should develop appropriate compensation levels that are in line with their labor market. Doing so will enable the organization to establish and maintain a reputation as a competitive, fair, and equitable employer as well as a good steward of public funds.
3. When considering any salary or benefit changes, the immediate and anticipated long-term financial resources of the organization always should be taken into account.
4. Appropriate financial practices should be followed to both disclose and properly fund any related future liability to the local government.

Appendix C:

Professional Organizations to Consider Posting Position Vacancy

International City/County Management Association (ICMA)

777 North Capitol Street NE, Suite 500
Washington, DC 20002
Phone: 202-289-4262

JobCenter

Rates/Information:

www.icma.org/en/icma/career_network/employers/difference

American Society for Public Administration (ASPA)

1301 Pennsylvania Avenue NW, Suite 700
Washington, DC 20004
Phone: 202-393-7878

PublicServiceCareers.org (online)

Rates/Information:

www.publicservicecareers.org/?pageid=617

National Association of Counties (NACo)

25 Massachusetts Avenue NW, Suite 500
Washington, DC 20001
Phone: 202-393-6226 or 1-888-407-6226

JobsOnline (website) and County News Job Market/Classified Ad (newspaper)

Rates/Submissions:

www.naco.org/programs/jobsonline/Pages/JobOnlineSubmission.aspx

National Association of County Administrators (NACA)

777 North Capitol Street NE, Suite 500
Washington, DC 20002
Email: naca@icma.org

National Forum for Black Public Administrators (NFBPA)

777 North Capitol Street NE, Suite 807
Washington, DC 20002
Phone: 202-408-9300

NFBPA Career Center

Ad Rates/Information: careers.nfbpa.org/rates.cfm

Phone: 1-866-964-2765

E-mail (Job Posting Sales): postings@boxwoodtech.com

National League of Cities (NLC)

1301 Pennsylvania Avenue NW, Suite 550
Washington, DC 20004

Nation's Cities Weekly Classifieds

Rates/Submissions:

www.nlc.org/news-center/nations-cities-weekly/classifieds/ncw-submit-classified

International Hispanic Network (IHN)

2107 North First Street, Suite 470
San José, CA 95131
Phone: 408-392-0232

Job Posting

Rates/Submissions:

www.ihnonline.org/jobsaddform.asp

STATE MUNICIPAL LEAGUES

Alabama League of Municipalities (www.alalm.org)

535 Adams Avenue
Montgomery, AL 36104
Phone: 334-262-2566

Municipal Classified Ads

Posting Information: carrieb@alalm.org

Alaska Municipal League (www.akml.org)

217 Second Street, Suite 200
Juneau, AK 99801
Phone: 907-586-1325

AML Classifieds

Informational Brochure:

www.akml.org/uploads/MunicipalClassifiedAdGuidelines.pdf

Phone: 1-877-636-1325

Email: info@akml.org

League of Arizona Cities and Towns (www.azleague.org)

1820 West Washington Street
Phoenix, AZ 85007
Phone: 602-258-5786

Municipal Employment Opportunities

Rates/Information:

www.azleague.org/index.cfm?fuseaction=jobs.main

Email: jobs@azleague.org

Arkansas Municipal League (www.arml.org)

301 West 2nd Street
North Little Rock, AR 72115
Phone: 501-374-3484

City & Town Municipal Mart

Rates/Information:

www.arml.org/classifieds.html

Submissions: 501-374-3484

League of California Cities (www.cacities.org)

1400 K Street, Suite 400
Sacramento, CA 95814
Phone: 916-658-8200

Western Cities

Rates/Submissions:

www.westerncity.com/Western-City/Job-Opportunities/How-to-Post-a-Job

Colorado Municipal League (www.cml.org)

1144 Sherman Street
Denver, CO 80203
Phone: 303-831-6411 or 1-866-578-0936

CareerLink

Postings: www.cml.org/CareerLink.aspx

Connecticut Conference of Municipalities (www.ccm-ct.org)

900 Chapel Street, 9th Floor
New Haven, CT 06510
Phone: 203-498-3000

Municipal Job Bank

Information/Rates/Submissions:

www.ccm-ct.org/Plugs/job-bank.aspx

Delaware League of Local Governments (www.dllg.org)

P.O. Box 484
Dover, DE 19903
Phone: 302-678-0991

Provides no employment listings

Florida League of Cities (www.floridaleagueofcities.com)

301 South Bronough Street, Suite 300
Tallahassee, FL 32301
Phone: 850-222-9684 or 1-800-342-8112

FLC E-News

Information/Submissions:

www.floridaleagueofcities.com/Publications.aspx?CNID=179

Phone: 850-322-7221

Georgia Municipal Association (www.gmanet.com)

201 Pryor Street SW
Atlanta, GA 30303
Phone: 404-688-0472

Classifieds/Marketplace

Submissions:

www.glga.org/SubmitListing.aspx

Phone: 678-686-6209

Hawaii (none available)**Association of Idaho Cities** (www.idahocities.org)

3100 South Vista Avenue, Suite 310
Boise, ID 83705
Phone 208-344-8594

Employment Opportunities

Information/Rates/Submissions:

www.idahocities.org/index.aspx?nid=213

Illinois Municipal League (www.iml.org)

500 East Capitol Avenue
Springfield, IL 62701
Phone: 217-525-1220

Classifieds

Information/Submissions:

www.iml.org/contact.cfm?user=rturner&subject=Submit%20Classified%20Ad

Rates: www.iml.org/page.cfm?category=640

Indiana Association of Cities and Towns

(www.citiesandtowns.org)

200 South Meridian Street, Suite 340
Indianapolis, IN 46225
Phone: 317-237-6200

Municipal Dispatch

Contact Publications and Marketing Director

Staff Directory:

www.citiesandtowns.org/topic/subtopic.php?fDD=2-15

Iowa League of Cities (www.iowaleague.org)

317 Sixth Avenue, Suite 800
Des Moines, IA 50309
Phone: 515-244-7282

Classifieds

Information/Rates/Submissions:

www.iowaleague.org/Pages/SubmitClassified.aspx

League of Kansas Municipalities (www.lkm.org)

300 SW Eighth Avenue
Topeka, KS 66603
Phone: 785-354-9565

Kansas Government Journal (and online)

Rates: www.lkm.org/classifieds/jobs

Submissions: classifieds@lkm.org

Kentucky League of Cities (www.klc.org)

100 East Vine Street, Suite 800
Lexington, KY 40507
Phone: 859-977-3700 or 1-800-876-4552

City Job Opportunities Online

Submissions: www.klc.org/employment_post.asp

Louisiana Municipal Association (www.lma.org)

700 North 10th Street
Baton Rouge, LA 70802
Phone: 225-344-5001 or 1-800-234-8274

Maine Municipal Association (www.memun.org)

60 Community Drive
Augusta, ME 04330
Phone: 207-623-8428

Job Bank and Classifieds

Information/Rates:

www2.memun.org/public/wantads/itemlist.cfm

Submissions: ResourceCenter@memun.org

Maryland Municipal League (www.mdmunicipal.org)

1212 West Street
Annapolis, MD 21401
Phone: 410-268-5514 or 1-800-492-7121

Classifieds

Submissions: stevel@mdmunicipal.org

Massachusetts Municipal Association (www.mma.org)

One Winthrop Square
Boston, Massachusetts 02110
Phone: 617-426-7272

The Beacon (and online)

Information/Rates:

www.mma.org/ad-rates-and-details

Submissions: www.mma.org/ad-submission-form

Michigan Municipal League (www.mml.org)

1675 Green Road
Ann Arbor, MI 48105
Phone: 734-662-3246 or 1-800-653-2483

Classifieds

Information/Rates:

www.mml.org/classifieds/guidelines.html

Submissions:

www.mml.org/classifieds/classifiedsform.php

League of Minnesota Cities (www.lmc.org)

145 University Avenue West
St. Paul, MN 55103
Phone: 651-281-1200 or 1-800-925-1122

City Job Opportunities

Information/Rates:

www.lmc.org/page/1/posting-city-jobs.jsp

Submissions: HR-CityAds@lmc.org

Mississippi Municipal League (www.mmlonline.com)

600 East Amite Street, Suite 104
Jackson, MS 39201
Phone: 601-353-5854

Classifieds

www.mmlonline.com/classifieds.aspx

Contact MML Staff – Staff Directory:

www.mmlonline.com/contact.aspx

Missouri Municipal League (www.mocities.com)

1727 Southridge Drive
Jefferson City, MO 65109
Phone: 573-635-9134

Career Center

Information/Rates:

www.mocities.com/networking

Submissions: tshaw@mocities.com

Montana League of Cities and Towns (www.mlct.org)

208 North Montana Avenue, Suite 106

Helena, MT 59601

Phone: 406-442-8768

Job Openings*Submissions:* Contact Office Manager*Staff Directory:* www.mlct.org/about-mlct/staff.html**League of Nebraska Municipalities** (www.lonm.org)

1335 L Street, #A

Lincoln, NE 68508-2596

Phone: 402-476-2829

Job Postings*Information/Rates/Submissions:*www.lonm.org/careers.html**Nevada League of Cities and Municipalities**(www.nvleague.org/admin/about.htm)

310 South Curry Street

Carson City, NV 89703

Phone: 775-882-2121

New Hampshire Local Government Center (www.nhlgc.org)

25 Triangle Park Drive

Concord, NH 03301

Phone: 603-224-7447

Classifieds*Information/Rates/Submissions:*www.nhlgc.org/classifieds/submitad.asp**New Jersey State League of Municipalities**(www.njslom.org)

222 West State Street

Trenton, NJ 08608

Phone: 609-695-3481

Classifieds*Information/Rates/Submissions:*www.njslom.org/classifieds_jobs.html**New Mexico Municipal League** (www.nmml.org)

1229 Paseo de Peralta

Santa Fe, NM 87501

Phone: 1-800-432-2036

Classifieds*Information/Submissions:*www.nmml.org/blog/category/classifieds/positions-available**New York State Conference of Mayors and Municipal Officials** (www.nycom.org)

119 Washington Avenue

Albany, NY 12210

Phone: 518-463-1185

Help Wanted Classifieds*Information/Submissions:*www.nycom.org/mn_class/helpwanted.asp#**North Carolina League of Municipalities** (www.nclm.org)

215 North Dawson Street

Raleigh, NC 27603

Phone: 919-715-4000

Southern City, League Letter, and/or online:*Information:*www.nclm.org/resource-center/Pages/jobs.aspx*Rates/Submissions:*www.nclm.org/programs-services/publications/Pages/southern-city.aspx**North Dakota League of Cities** (www.ndlc.org)

410 East Front Avenue

Bismarck, ND 58504

Phone: 701-223-3518

Municipal Ads – Job Opportunitieswww.ndlc.org/index.asp?Type=B_BASIC&SEC={D835005A-831C-4BB1-BF46-7D93A07A0083}www.ndlc.org/index.asp?Type=B_BASIC&SEC={846F9FCA-A6EE-4082-B241-8DA3E991D99A}*Contact NDLC Staff – Staff Directory:*www.ndlc.org/index.asp?Type=B_BASIC&SEC={846F9FCA-A6EE-4082-B241-8DA3E991D99A}www.ndlc.org/index.asp?Type=B_BASIC&SEC={846F9FCA-A6EE-4082-B241-8DA3E991D99A}**Ohio Municipal League** (www.omloho.org)

175 South Third Street, Suite 510

Columbus, OH 43215

Phone: 614-221-4349

Classified Advertisements*Information/Rates/Submissions:*www.omloho.org/Classifieds.htm**Oklahoma Municipal League** (www.oml.org)

201 Northeast 23rd Street

Oklahoma City, OK 73105

Phone: 405-528-7515

Job Listings*Information/Rates/Submissions:*www.okml.webs.com/joblistings.htm

League of Oregon Cities (www.orcities.org)

1201 Court Street NE, Suite 200
Salem, OR 97301
Phone: 503-588-6550

Personnel Recruitment – Jobs

Information/Rates/Submissions:

www.orcities.org/JobInterims/Job/tabid/816/language/en-US/Default.aspx

Available Interim Candidates:

www.orcities.org/JobInterims/Interims/tabid/5849/language/en-US/Default.aspx

Pennsylvania League of Cities & Municipalities

(www.plcm.org)

414 North Second Street
Harrisburg, PA 17101
Phone: 717-236-9469

Municipal Job Junction

Information/Rates/Submissions:

www.plcm.org/index.asp?Type=B_BASIC&SEC={24C2F4FE-80F6-4E58-BA9F-53345F31E1D7}&DE

Rhode Island League of Cities and Towns

(www.rileague.org)

One State Street, Suite 502
Providence, RI 02908
Phone: 401-272-3434

Available Positions

Information/Submissions:

www.rileague.org/site/classifieds/available.html

Municipal Association of South Carolina (www.masc.sc)

1411 Gervais Street
Columbia, SC 29211
Phone: 803-799-9574

Job Openings:

Information/Submissions:

www.masc.sc/municipalities/Pages/Postinganadvertisement.aspx

South Dakota Municipal League (www.sdmunicipalleague.org)

208 Island Drive
Fort Pierre, SD 57532
Phone: 605-224-8654

Classifieds

Information/Rates/Submissions:

www.sdmunicipalleague.org/index.asp?Type=B_JOB&SEC=%7B9C4C9345-D0E6-470D-A708-181FD9B26F51%7D

Tennessee Municipal League (www.tml1.org)

226 Capitol Boulevard, Suite 710
Nashville, TN 37219
Phone: 615-255-6416

Classifieds

Contact Administrative Assistant – Staff Directory:

www.tml1.org/staff.php?ln_ses=1%7C4

Texas Municipal League (www.tml.org)

1821 Rutherford Lane, Suite 400
Austin, TX 78754
Phone: 512-231-7400

Career Center

Information/Submission: www.tml.org/careercenter.asp

Utah League of Cities and Towns (www.ulct.org)

50 South 600 East, Suite 150
Salt Lake City, UT 84102
Phone: 801-328-1601 or 1-800-852-8528

Job Bank

Submissions: www.ulct.org/jobbank/index.html

Vermont League of Cities & Towns (www.vlct.org)

89 Main Street, Suite 4
Montpelier, VT 05602
Phone: 802-229-9111

Classifieds

Information/Rates/Submissions:

www.vlct.org/marketplace/classifiedads

Virginia Municipal League (www.vml.org)

13 East Franklin Street
Richmond, VA 23219
Phone: 804-649-8471

Marketplace – Jobs in Local Government

Information/Rates/Submissions:

www.vml.org/JOBS/JObs.html

Association of Washington Cities (www.awcnet.org)

1076 Franklin Street SE
Olympia, WA 98501
Phone: 360-753-4137

JobNet

Information/Submissions:

www.awcnet.org/Jobnet/ForEmployers.aspx

West Virginia Municipal League (www.wvml.org)

2020 Kanawha Boulevard
Charleston, WV 25311
Phone: 304-342-5564 or 1-800-344-7702

Classifieds

Information/Submissions: wvml@wvml.org

League of Wisconsin Municipalities (www.lwm-info.org)

122 West Washington Avenue, Suite 300
Madison, WI 53703
Phone: 608-267-2380

Classifieds

Information/Rates/Submissions:

www.lwm-info.org/index.asp?Type=B_JOB&SEC=%7B428BF440-C1B3-494D-8B98-837FE87BCFCA%7D

Wyoming Association of Municipalities (www.wyomuni.org)

315 West 27th Street
Cheyenne, WY 82001
Phone: 307-632-0398

Classifieds

Information:

www.wyomuni.org/index.asp?Type=B_JOB&SEC={AE206698-9002-49A0-983C-9CFCD28D226}
Submissions: wam@wyomuni.org

Appendix D:

Potential Interview Questions³

It is suggested that each member of the governing body ask the same question(s) of each candidate.

Candidate Traits/Experience/ Qualifications

1. Provide a brief summary of your education and work experience.
2. Please briefly describe your experience with
 - a. Land use planning
 - b. Economic development/redevelopment
 - c. Tax increment financing
 - d. Business attraction and retention programs
 - e. Beautification programs
 - f. Business assistance programs—e.g., façade improvement, code compliance
 - g. Annexation
 - h. Subdivision policies and regulations, particularly as they relate to storm-water management
 - i. Zoning
 - j. Building code administration
 - k. Municipal facilities expansion—in particular, water and wastewater utility expansions
3. How would you describe your leadership and management styles?

Interaction with Governing Body

1. What do you perceive to be the chief administrator's role in working with the governing body, local government attorney, and clerk?
2. What are your expectations of the governing body in relation to
 - a. Yourself
 - b. Other staff
3. How and when do you communicate with the governing body?

Candidate Thoughts on Role of Administrator

1. In your opinion, what role should the administrator have in the community?
2. Do you believe the administrator should be an active member of a service or fraternal organization? If yes, why?
3. How do you deal with the news media?
4. How do you deal with special-interest or single-interest groups?
5. What is the best way for an administrator to deal with an angry constituent?

Personnel Experience

1. How and when do you delegate responsibility and authority?
2. Have you ever been at the bargaining table and been actively engaged in negotiating an agreement?
3. Have you taken part in mediation, fact finding, or arbitration? Which ones? Please explain your experience in such process(es) including your role/level of involvement and your thoughts regarding the outcomes of these experiences.
4. Have you ever had to discipline, demote, or fire an employee? Please elaborate.
5. How do you educate, encourage, and motivate your staff?
6. Are you familiar with state and federal laws relating to nondiscrimination, sexual harassment, employees with disabilities, and equal opportunity?
7. Have charges of violation of state or federal employment laws or a grievance ever been filed against you or your city? Please explain.
8. What experience have you had in the preparation and implementation of personnel rules, regulations, procedures, and compensation plans? Please describe.

³ Adapted from the Illinois City/County Management Association's *A Guide to the Recruitment and Selection of a Chief Administrative Officer*.

9. What is your experience with employee benefits administration, group health insurance, and risk management?
10. What in your opinion is the most serious issue today in local government personnel management?
11. How and when should private sector resources (e.g., contractors) be used to provide village services?

Financial Management Experience

1. Is there a difference between a financial plan and a budget? If so, please explain how they differ.
2. Are/were you the designated budget officer for your local government? Did you prepare and present the budget to the council, and upon adoption, were you responsible for implementation? Please explain the outcomes of various budget processes and any challenges you encountered through budget development through council adoption.
3. What is your experience with debt financing? Please give an example.
4. Have you secured and administered any type of loans or grants? Please give an example.
5. Describe the most successful capital improvement project you were responsible for and what made it successful?
6. Have you reviewed our annual budget and/or annual report? If yes, what is your impression of our financial condition?
7. What is your opinion of “pay as you go” financing of maintenance and capital projects? Special assessments? Special taxing districts?

8. What type of financial reports do you provide the elected body and with what frequency?
9. Have you read our comprehensive or general plan? What are your impressions or thoughts?

Intergovernmental Relations Experience

1. What experience have you had in dealing with
 - a. Councils of government/intergovernmental agencies?
 - b. County government?
 - c. Other local governments (schools, parks, etc.)?
 - d. State agencies?
 - e. Federal agencies?
 - f. State legislature?
 - g. Congress?
2. Do you feel comfortable “lobbying”?

External Organizational and Professional Association Relations

1. Have you been an active participant in the activities of a statewide municipal league, statewide city or county management association, the International City/County Management Association (ICMA) or other professional organizations devoted to local government? Please give examples of your activities.
2. Are you an ICMA Credentialed Manager? If so, how do you fulfill your annual professional development requirement?

Relations with Applicants—Do's and Don'ts

Do:

- Keep all candidates informed of their status at all times.
- Identify one point of contact through which everything flows, including contacts with candidates, reference checks, etc., in order to ensure that the information, messages, and details are consistent and that the process is fair and equitable.
- Keep all information strictly confidential throughout the entire recruitment and selection process unless state law requires otherwise.
- Create an outreach strategy that will ensure a diverse candidate pool.
- After carefully reviewing all applicant submittals, select a short list of the most promising candidates.
- While maintaining the confidentiality, carefully check educational credentials and references on those candidates judged best qualified.
- Invite those candidates judged best qualified for initial interviews at the local government's expense.
- Send the candidates under consideration an information packet that may include the outreach brochure and copies of your government's budget, charter, annual report, and other pertinent documents; or provide the information on where to find this material on the agency's website.
- Pay expenses of the candidates invited to a second interview (and of their spouses/partners, if applicable).
- Perform detailed background checks on the final candidate(s).
- Visit, if possible, the local governments in which the most promising candidates work.
- Be prepared to enter into a formal written employment agreement with the successful candidate.
- Promptly notify all other candidates once the selection has been made and the position has been accepted. However, it is best to wait until the selected finalist has accepted the position and the agency and candidate have mutually agreed to the provisions of the employment contract.

Don't:

- Let the selection process last too long.
- Expect to get all the necessary information about the candidates from written material.
- Forget that you are seeking overall management ability, not technical competence in one specialized field.
- Forget to consider candidates who are assistant managers as well as current managers
- Overlook the need for candidates to possess municipal administrative experience and the advantages or value of college or university training, post degree training, and continued professional development.
- Release for publication any names or local governments of candidates unless state law requires it.

ICMA Model Employment Agreement

Introduction

This Agreement, made and entered into this [date], by and between the [local government] of [state], [town/city/county] a municipal corporation, (hereinafter called "Employer") and [name], (hereinafter called "Employee") an individual who has the education, training and experience in local government management and who, as a member of ICMA, is subject to the ICMA Code of Ethics, both of whom agree as follows:

Section 1: Term

Recommended

A. This agreement shall remain in full force in effect from [date] until terminated by the Employer or Employee as provided in Section 9, 10 or 11 of this agreement.

Option 2

The term of this agreement shall be for an initial period of [#] years from [date] to [date]. This Agreement shall automatically be renewed on its anniversary date for a [#] year term unless notice that the Agreement shall terminate is given at least [#] months (12 months recommended) before the expiration date. In the event the agreement is not renewed, all compensation, benefits and requirements of the agreement shall remain in effect until the expiration of the term of the Agreement unless Employee voluntarily resigns. In the event that the Employee is terminated, as defined in Section 9 of this agreement, the Employee shall be entitled to all compensation including salary, accrued vacation and sick leave, car allowance paid in lump sum plus continuation of all benefits for the remainder of the term of this agreement.

Section 2: Duties and Authority

Employer agrees to employ [name] as [title] to perform the functions and duties specified in [legal reference] of the [local government] charter and by [legal reference] of the [local government] code and to perform other legally permissible and proper duties and functions.

Section 3: Compensation

Recommended

- A. Base Salary: Employer agrees to pay Employee an annual base salary of [\$ amount], payable in installments at the same time that the other management employees of the Employer are paid.
- B. This agreement shall be automatically amended to reflect any salary adjustments that are provided or required by the Employer's compensation policies.
- C. Consideration shall be given on an annual basis to increase compensation.

Option 1

The Employer agrees to increase the compensation of the Employee dependent upon the results of the performance evaluation conducted under the provisions of Section 12 of this Agreement. Increased compensation can be in the form of a salary increase and/or a bonus.

Option 2

The Employer agrees to increase the compensation by [%] each year.

Option 3

The Employer agrees to increase the compensation each year by the minimum of the average across the board increase granted to other employees of the Employer.

Option 4

The Employer agrees to increase the compensation of the Employee dependent upon the results of the performance evaluation conducted under the provisions of Section 12 of this Agreement in addition to providing a fixed annual increase in the Employee's salary based on an agreed upon economic indicator, such as the Consumer Price Index.

Section 4: Health, Disability and Life Insurance Benefits Recommended

- A. The Employer agrees to provide and to pay the premiums for health, hospitalization, surgical, vision, dental and comprehensive medical insurance for

the Employee and his/her dependents equal to that which is provided to all other employees of the [local government] or, in the event no such plan exists, to provide coverage for the Employee and dependents.

- B. The Employer agrees to put into force and to make required premium payments for short term and long term disability coverage for the Employee.
- C. The Employee may elect to submit once per calendar year to a complete physical examination, including a cardio-vascular examination, by a qualified physician selected by the Employee, the cost of which shall be paid by the Employer.
- D. The Employer shall pay the amount of premium due for term life insurance in the amount of three (3) times the Employee's annual base salary, including all increases in the base salary during the life of this agreement. The Employee shall name the beneficiary of the life insurance policy.

Option 1

- A. The Employer agrees to provide for health, hospitalization, surgical, vision, dental and comprehensive medical insurance for the Employee and his/her dependents equal to that which is provided to all other employees of the [local government] or, in the event no such plan exists, to provide coverage for the Employee and dependents. Employer shall pay all premiums for the Employee and the Employee's dependents.
- B. The Employer agrees to put into force and to make required premium payments for short term and long term disability coverage for the Employee.
- C. The Employee may elect to submit once per calendar year to a complete physical examination, including a cardio-vascular examination, by a qualified physician selected by the Employee, the cost of which shall be paid by the Employer.
- D. The Employer shall pay the amount of premium due for term life insurance in the amount of three (3) times the Employee's annual base salary, including all increases in the base salary during the life of this agreement. The Employee shall name the beneficiary of the life insurance policy.

Option 2

- 1. The Employer shall provide travel insurance for the Employee while the Employee is traveling on the Employer's business, with the Employee to name beneficiary thereof. Should the Employee die while on travel for the Employer, the Employer shall

cover the full cost of retrieving and transporting the Employee's remains back to the custody of the Employee's family.

Section 5: Vacation, Sick, and Military Leave

Recommended

- A. Upon commencing employment, the Employee shall be credited with sick and vacation leave equal to the highest annual accrual provided to all other employees. The Employee shall then accrue sick and vacation leave on an annual basis at the highest rate provided to any other employees.
- B. Upon commencing employment, the Employee shall have access to a bank of 180 sick days to be used in the case of serious medical conditions. This leave can only be used to provide coverage during the waiting period between the onset of illness or disability and the point at which short or long term disability coverage takes effect and may be renewed after each occurrence.
- C. The Employee is entitled to accrue all unused leave, without limit, and in the event the Employee's employment is terminated, either voluntarily or involuntarily, the Employee shall be compensated for all accrued vacation time, all paid holidays, executive leave, and other benefits to date.
- D. The Employee shall be entitled to military reserve leave time pursuant to state law and [local government] policy.

Additional Option

- 1. The Employee shall annually be credited with five (5) days of executive leave.

Section 6: Automobile

The Employee's duties require exclusive and unrestricted use of an automobile to be mutually agreed upon and provided to the Employee at the Employer's cost, subject to approval by Employer which shall not be withheld without good cause. It shall be mutually agreed upon whether the vehicle is purchased by the city, provided under lease to the city or to the Employee, or provided through a monthly allowance.

Option 1 - Monthly Vehicle Allowance

The Employer agrees to pay to the Employee, during the term of this Agreement and in addition to other

salary and benefits herein provided, the sum of [dollar amount] per year, payable monthly, as a vehicle allowance to be used to purchase, lease, or own, operate and maintain a vehicle. The monthly allowance shall be increased annually by [% or \$] amount. The Employee shall be responsible for paying for liability, property damage, and comprehensive insurance coverage upon such vehicle and shall further be responsible for all expenses attendant to the purchase, operation, maintenance, repair, and regular replacement of said vehicle. The Employer shall reimburse the Employee at the IRS standard mileage rate for any business use of the vehicle beyond the greater [local government] area. For purposes of this Section, use of the car within the greater [local government] area is defined as travel to locations within a _____ mile (recommended fifty (50) mile) radius of [local government office].

Option 2 - Employer Provided Vehicle

The Employer shall be responsible for paying for liability, property damage, and comprehensive insurance, and for the purchase (or lease), operation, maintenance, repair, and regular replacement of a full-size automobile.

Section 7: Retirement

Recommended

1. The Employer agrees to enroll the Employee into the applicable state or local retirement system and to make all the appropriate contributions on the Employee's behalf, for both the Employer and Employee share required.
2. In addition to the Employer's payment to the state or local retirement system (as applicable) referenced above, Employer agrees to execute all necessary agreements provided by ICMA Retirement Corporation [ICMA-RC] or other Section 457 deferred compensation plan for Employee's [continued] participation in said supplementary retirement plan and, in addition to the base salary paid by the Employer to Employee, Employer agrees to pay an amount equal to [percentage of Employee's base salary, fixed dollar amount of [\$], or maximum dollar amount permissible under Federal and state law into the designated plan on the Employee's behalf, in equal proportionate amount each pay period. The parties shall fully disclose to each other the financial impact of any amendment to the terms of Employee's retirement benefit.

In lieu of making a contribution to a Section 457 deferred compensation plan, the dollar value

of this contribution may be used, at the Employee's option, to purchase previous service from another qualified plan.

Option 1

Recognizing that effective service with the community is based in part on the stability provided through a long-term relationship, the Employer shall provide a retirement annuity, as directed by the Employee, at a rate of [dollar amount], payable at the completion of each quarter of the fiscal year. This annuity serves as a retirement contribution and does not require further action of the Employer.

Option 2

The Employer shall adopt a qualified 401(a) defined contribution plan offered through ICMA Retirement Corporation for the Employee in the form of a money purchase plan to which the Employer shall contribute [%] of salary or [%] of compensation annually.

2A. Option: The Employee shall be required to contribute [%] of base salary or [dollar amount] annually on a pre-tax basis as a condition of participation.

Option 3

The Employer shall adopt a qualified 401(a) profit-sharing plan offered through ICMA Retirement Corporation for the Employee in the form of a money purchase plan to which the Employer shall contribute [%] of all performance bonuses annually.

3A. Option: The Employee shall be required to contribute [%] of base salary or [dollar amount] annually on a pre-tax basis as a condition of participation.

Section 8: General Business Expenses

Recommended

1. Employer agrees to budget for and to pay for professional dues and subscriptions of the Employee necessary for continuation and full participation in national, regional, state, and local associations, and organizations necessary and desirable for the Employee's continued professional participation, growth, and advancement, and for the good of the Employer.
2. Employer agrees to budget for and to pay for travel and subsistence expenses of Employee for professional and official travel, meetings, and occasions to adequately continue the professional development of Employee and to pursue necessary official functions for Employer, including but not limited

to the ICMA Annual Conference, the state league of municipalities, and such other national, regional, state, and local governmental groups and committees in which Employee serves as a member.

3. Employer also agrees to budget for and to pay for travel and subsistence expenses of Employee for short courses, institutes, and seminars that are necessary for the Employee's professional development and for the good of the Employer.
4. Employer recognizes that certain expenses of a non-personal but job related nature are incurred by Employee, and agrees to reimburse or to pay said general expenses. The finance director is authorized to disburse such moneys upon receipt of duly executed expense or petty cash vouchers, receipts, statements or personal affidavits.
5. The Employer acknowledges the value of having Employee participate and be directly involved in local civic clubs or organizations. Accordingly, Employer shall pay for the reasonable membership fees and/or dues to enable the Employee to become an active member in local civic clubs or organizations.

Option 1

Technology: The Employer shall provide Employee with a computer, software, fax/modem, cell phone and pager required for the Employee to perform the job and to maintain communication.

Section 9: Termination

Recommended

For the purpose of this agreement, termination shall occur when:

1. The majority of the governing body votes to terminate the Employee at a duly authorized public meeting.
2. If the Employer, citizens or legislature acts to amend any provisions of the [charter, code, enabling legislation] pertaining to the role, powers, duties, authority, responsibilities of the Employee's position that substantially changes the form of government, the Employee shall have the right to declare that such amendments constitute termination.
3. If the Employer reduces the base salary, compensation or any other financial benefit of the Employee, unless it is applied in no greater percentage than the average reduction of all department heads, such action shall constitute a breach of this agreement and will be regarded as a termination.

4. If the Employee resigns following an offer to accept resignation, whether formal or informal, by the Employer as representative of the majority of the governing body that the Employee resign, then the Employee may declare a termination as of the date of the suggestion.
5. Breach of contract declared by either party with a 30 day cure period for either Employee or Employer. Written notice of a breach of contract shall be provided in accordance with the provisions of Section 20.

Option 1

In the event the Employee is terminated by the Employer during the six (6) months immediately following the seating and swearing-in of one or more new governing body members, and during such time that Employee is willing and able to perform his duties under this Agreement, then, Employer agrees to pay Severance in accordance with Section 10 plus salary and benefits in accordance with Section 10 for any portion of the six months not worked.

Section 10: Severance

Severance shall be paid to the Employee when employment is terminated as defined in Section 9. If the Employee is terminated, the Employer shall provide a minimum severance payment equal to one year salary at the current rate of pay. This severance shall be paid in a lump sum unless otherwise agreed to by the Employer and the Employee.

The Employee shall also be compensated for all accrued sick leave, vacation time, all paid holidays, and executive leave. The Employer agrees to make a contribution to the Employee's deferred compensation account on the value of this compensation calculated using the rate ordinarily contributed on regular compensation.

For a minimum period of one year following termination, the Employer shall pay the cost to continue the following benefits:

1. Health insurance for the employee and all dependents as provided in Section 4A
2. Life insurance as provided in Section 4D
3. Short-term and long-term disability as provided in Section 4B
4. Car allowance or payment of lease, or provide option to buy city vehicle at depreciated value
5. Out placement services should the employee desire them in an amount not to exceed [\$10,000 to \$15,000 recommended], and
6. Any other available benefits.

If the Employee is terminated because of a conviction of a felony, then the Employer is not obligated to pay severance under this section.

Section 11: Resignation

In the event that the Employee voluntarily resigns his/her position with the Employer, the Employee shall provide a minimum of 30 days notice unless the parties agree otherwise.

Section 12: Performance Evaluation

Employer shall annually review the performance of the Employee in [month] subject to a process, form, criteria, and format for the evaluation which shall be mutually agreed upon by the Employer and Employee. The process at a minimum shall include the opportunity for both parties to: (1) prepare a written evaluation, (2) meet and discuss the evaluation, and (3) present a written summary of the evaluation results. The final written evaluation should be completed and delivered to the Employee within 30 days of the evaluation meeting.

Section 13: Hours of Work

It is recognized that the Employee must devote a great deal of time outside the normal office hours on business for the Employer, and to that end Employee shall be allowed to establish an appropriate work schedule.

Section 14: Outside Activities

The employment provided for by this Agreement shall be the Employee's sole employment. Recognizing that certain outside consulting or teaching opportunities provide indirect benefits to the Employer and the community, the Employee may elect to accept limited teaching, consulting or other business opportunities with the understanding that such arrangements shall not constitute interference with nor a conflict of interest with his or her responsibilities under this Agreement.

Section 15: Moving and Relocation Expenses

Recommended

Employee agrees to establish residence within the corporate boundaries of the local government, if required, within [number] months of employment, and thereafter to maintain residence within the corporate boundaries of the local government.

- A. Employer shall pay directly for the expenses of moving Employee and his/her family and personal property from [location name] to [location name]. Said moving expenses include packing, moving, storage costs, unpacking, and insurance charges.
- B. Employer shall reimburse Employee for actual lodging and meal expenses for his/her family in route from [location name] to [location name]. Mileage costs for moving two personal automobiles shall be reimbursed at the current IRS allowable rate of [cents amount] per mile.
- C. Employer shall pay Employee an interim housing supplement of [dollar amount] per month for a period commencing [date], and shall continue for a maximum of [#] months, or until a home is purchased and closed on, within the corporate limits of the [local government name], whichever event occurs first.
- D. Employer shall reimburse Employee for a total of [number] round trip air fares for Employee and his/her family [amount of total tickets] at any time during the first year of service to assist with house hunting and other facets of the transition and relocation process. The Employee and his/her family may utilize and distribute the total [enter number] individual round trip tickets in any combination of individual members making the trips. The Employee shall be reimbursed for actual lodging and meal expenses incurred by Employee or his/her family members on any trips conducted prior to relocation, as detailed herein.
- E. The Employee shall be reimbursed, or Employer may pay directly, for the expenses of packing and moving from temporary housing to permanent housing during the first year of this agreement.
- F. The Employer shall pay the Employee's tax liability on all Employer provided benefits for relocation and housing.

Option 1

The Employer shall pay a lump sum payment of [\$] to the Employee to cover relocation costs.

Section 16: Home Sale and Purchase Expenses

Recommended

- A. Employee shall be reimbursed for the direct costs associated with the sale of Employee's existing personal residence, said reimbursement being limited to real estate agents' fees, and other closing

costs that are directly associated with the sale of the house. Said reimbursement should not exceed the sum of [\$].

- B. Employee shall be reimbursed for the costs incidental to buying or building a primary residence within the [local government], including real estate fees, title insurance, and other costs directly associated with the purchase or construction of the house, said reimbursement not to exceed the sum of [\$].

Option 1

Employer shall reimburse Employee for up to three discount points within thirty (30) days following purchase of a home within the corporate limits of [local government name], in an effort to minimize mortgage rate differentials.

Option 2

Employer shall provide Employee with a _____ [fixed-interest, variable-interest, interest-only] loan to purchase a house. The amount of the loan shall not exceed \$_____. The loan shall be repaid in full to the Employer upon the occurrence of either of the following events: (i) the home, or the Employee's interest in the home, is sold, transferred, or conveyed, or (ii) the Employee's employment with the Employer, for any reason, is terminated. The Employer and Employee shall execute any and all documents necessary to document this transaction. In the case where the value of the home decreases, the Employee shall not be required to repay the loan.

Option 3

Employer agrees to provide the Employee a loan for the purchase of a home in an amount not to exceed [dollar amount]. Employee shall pay Employer a monthly mortgage payment of [dollar amount] for interest, which is equal to the amount currently being paid in principle and interest for the current residence. Employee shall accrue equity at a rate of [%] per month.

Upon termination of employment with the Employer, Employee shall have a maximum of six months to sell the home while continuing to reside in it under the terms and conditions here. Should the home sell during the time period, Employer shall receive 100% of the proceeds minus the percentage of equity accrued by Employee as described above, and minus the amount of equity originally invested by Employee. Said accrued equity and original equity shall both be payable to Employee upon closing. Said original equity invested shall be calculated as an

amount equal to the percentage of original purchase price, represented by the original equity investment by Employee, and adjusted to be the same percentage of equity in the current sale price of the home. All closing costs borne by the seller shall be split between Employer and Employee in a proportion equal to the equity share described above. Should the house fail to sell within the allotted six month time period, Employer has the option of following the previous arrangement to continue in place or to purchase equity, calculated as provided above, plus the original cost of all improvements made to the property.

Section 17: Indemnification

Beyond that required under Federal, State or Local Law, Employer shall defend, save harmless and indemnify Employee against any tort, professional liability claim or demand or other legal action, whether groundless or otherwise, arising out of an alleged act or omission occurring in the performance of Employee's duties as [job title] or resulting from the exercise of judgment or discretion in connection with the performance of program duties or responsibilities, unless the act or omission involved willful or wanton conduct. The Employee may request and the Employer shall not unreasonably refuse to provide independent legal representation at Employer's expense and Employer may not unreasonably withhold approval. Legal representation, provided by Employer for Employee, shall extend until a final determination of the legal action including any appeals brought by either party. The Employer shall indemnify employee against any and all losses, damages, judgments, interest, settlements, fines, court costs and other reasonable costs and expenses of legal proceedings including attorneys fees, and any other liabilities incurred by, imposed upon, or suffered by such Employee in connection with or resulting from any claim, action, suit, or proceeding, actual or threatened, arising out of or in connection with the performance of his or her duties. Any settlement of any claim must be made with prior approval of the Employer in order for indemnification, as provided in this Section, to be available.

Employee recognizes that Employer shall have the right to compromise and unless the Employee is a party to the suit which Employee shall have a veto authority over the settlement, settle any claim or suit; unless, said compromise or settlement is of a personal nature to Employee. Further, Employer agrees to pay all reasonable litigation expenses of Employee throughout the pendency of any litigation to which

the Employee is a party, witness or advisor to the Employer. Such expense payments shall continue beyond Employee's service to the Employer as long as litigation is pending. Further, Employer agrees to pay Employee reasonable consulting fees and travel expenses when Employee serves as a witness, advisor or consultant to Employer regarding pending litigation.

Section 18: Bonding

Employer shall bear the full cost of any fidelity or other bonds required of the Employee under any law or ordinance.

Section 19: Other Terms and Conditions of Employment

The Employer, only upon agreement with Employee, shall fix any such other terms and conditions of employment, as it may determine from time to time, relating to the performance of the Employee, provided such terms and conditions are not inconsistent with or in conflict with the provisions of this Agreement, the [local government] Charter or any other law.

A. Except as otherwise provided in this Agreement, the Employee shall be entitled to the highest level of benefits that are enjoyed by other [appointed officials, appointed employees, department heads or general employees] of the Employer as provided in the Charter, Code, Personnel Rules and Regulations or by practice.

Section 20: Notices

Notice pursuant to this Agreement shall be given by depositing in the custody of the United States Postal Service, postage prepaid, addressed as follows:

- (1) EMPLOYER: [Title and address of relevant official (mayor, clerk, etc.)]
- (2) EMPLOYEE: [Name and address for tax purposes of Employee]

Alternatively, notice required pursuant to this Agreement may be personally served in the same manner as is applicable to civil judicial practice. Notice shall be deemed given as of the date of personal service or as the date of deposit of such written notice in the course of transmission in the United States Postal Service.

Section 21: General Provisions

- A. Integration. This Agreement sets forth and establishes the entire understanding between the Employer and the Employee relating to the employment of the Employee by the Employer. Any prior discussions or representations by or between the parties are merged into and rendered null and void by this Agreement. The parties by mutual written agreement may amend any provision of this agreement during the life of the agreement. Such amendments shall be incorporated and made a part of this agreement.
- B. Binding Effect. This Agreement shall be binding on the Employer and the Employee as well as their heirs, assigns, executors, personal representatives and successors in interest.
- C. Effective Date. This Agreement shall become effective on _____, ____.
- D. Severability. The invalidity or partial invalidity of any portion of this Agreement will not effect the validity of any other provision. In the event that any provision of this Agreement is held to be invalid, the remaining provisions shall be deemed to be in full force and effect as if they have been executed by both parties subsequent to the expungement or judicial modification of the invalid provision.

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Leaders at the Core of Better Communities

PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

**City Manager
City of Fernandina Beach, Florida**

**Submission Due Date: March 29, 2023
This proposal is valid for 90 days**

Response to RFP 23-07

Strategic Government Resources
P.O. Box 1642, Keller, Texas 76244
Office: 817-337-8581

JJ Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com





March 29, 2023

Hon. Mayor Bradley Bean and City Commission
City of Fernandina Beach, Florida

Dear Mayor Bean and Commissioners,

Thank you for the opportunity to submit this proposal to assist the City of Fernandina Beach in your recruitment for a new City Manager. SGR has the unique ability to provide a personalized and comprehensive recruitment to meet your needs.

We would like to draw your attention to some key aspects that distinguish SGR from other recruitment firms and allow us to reach the most extensive and diverse pool of applicants available:

- SGR is a recognized thought leader in local government management and is actively engaged in local government operations, issues, and best management practices.
- SGR announces all conducted recruitments in our Servant Leadership e-newsletter, which reaches over 43,000 subscribers in all 50 states.
- SGR reaches a broad community of over 14,000 LinkedIn followers and over 2,000 Facebook followers.
- SGR sends targeted emails to our opt-in Job Alert subscriber database of over 5,800 city management professionals.
- Executive Vice President Doug Thomas would be the recruiter and project manager for this search. Doug is familiar with the City of Fernandina Beach's unique culture and expectations as he has conducted the following recent searches for the City: Comptroller, Human Resources Director, Deputy City Manager-City Engineer, and Parks and Recreation Director.

We recognize that the COVID-19 pandemic has created unique operating challenges for local governments in many ways, including recruitment efforts. SGR has invested in a variety of technologies that will allow a safe social distancing recruitment process, and we will continue to provide alternatives to in-person meetings, to the extent your organization desires, during this uncertain time.

Please note that we have modified our standard recruitment process and projected schedule to allow for comprehensive media reports for up to 15 candidates prior to presenting these candidates to the Citizen Committee.

We are happy to provide references upon request. We are excited about the prospect of conducting this recruitment for the City of Fernandina Beach, and we are available to visit with you at your convenience.

Respectfully submitted,

Jeri J. Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com

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Company Profile

Strategic Government Resources, Inc. (SGR) exists to help local governments become more successful by Recruiting, Assessing, and Developing Innovative, Collaborative, and Authentic Leaders. SGR was incorporated in Texas in 2002 with the mission to facilitate innovative leadership in local government. SGR is fully owned by former City Manager Ron Holifield, who spent two high-profile decades in city management and served as a City Manager in several cities.

SGR's business model is truly unique. Although we are a private company, SGR operates like a local government association. Most of SGR's principals are former local government officials, allowing SGR to bring a perspective and depth of local government expertise to every project that no other firm can match.

SGR's Core Values are Customer Service, Integrity, Philanthropy, Continuous Improvement, Agility, Collaboration, Protecting Relationships, and the Golden Rule.

SGR is a full-service firm, specializing in executive recruitment, interim placements, online training, onsite training, leadership development, psychometric assessments, strategic visioning retreats, one-on-one employee coaching, and other consulting services.

SGR's services are designed to promote innovation, team building, collaboration, and continuous improvement in local governments. SGR has approximately 700 local government clients in 47 states for all of our business lines combined. SGR has been, and continues to be, a leader in spurring innovation in local government.

SGR has 39 full-time employees, 3 part-time employees, 21 recruiters, 20 facilitators and multiple consultants who function as subject matter experts on a variety of projects.

SGR has corporate headquarters in Texas, as well as virtual offices in California, Colorado, Florida, Maryland, Minnesota, New York, North Carolina, Ohio, Oklahoma, and Oregon.

View all SGR team members and bios at: <https://sgr.pub/MeetTeamSGR>

SGR's Unique Qualifications

Extensive Network of Prospects

SGR is intent on being a leader in executive recruitment, and we believe it is imperative to be proactive in our mission to build a workforce that represents the communities we serve. SGR reaches an extensive and diverse pool of applicants by utilizing our unequaled network of prospects.

- Your position will be announced in SGR's Servant Leadership e-newsletter that reaches over 43,000 subscribers in all 50 states.
- We will send targeted emails to over 5,800 opt-in subscribers to SGR's City Management Job Alerts.
- Your position will appear on SGR's Website, <https://sgr.pub/SGRWebsite>, which has approximately 20,000 visitors per month.
- Your position will be posted to SGR's Job Board, <https://sgr.pub/SGRJobBoard>, which averages nearly 10,000 unique visitors per month and has more than 1,600 jobs listed at any given time.
- SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on Facebook, Twitter, Instagram, and LinkedIn.
- SGR frequently partners with local government associations including League of Women in Government, Local Government Hispanic Network, and the National Forum for Black Public Administrators.
- Approximately 65% of semifinalists selected by our clients learned about the open recruitments through our website, servant leadership e-newsletter, job board, job alert emails, social media, or personal contact.

Collective Local Government Experience

Our recruiters have years of experience in local government, as well as regional and national networks of relationships. The executive recruitment group works as a team to leverage their networks to assist with each recruitment. SGR team members are active on a national basis in local government organizations and professional associations. Many SGR team members frequently speak and write on issues of interest to local government executives. SGR can navigate all relevant networks as both a peer and insider.

Equal Opportunity Commitment

SGR strongly believes in equal employment opportunity. SGR does not discriminate and believes that equal opportunity is an ethical issue. SGR will not enter an engagement with an entity or organization that directs bias or expects bias to be demonstrated on any basis other than factors that affect the ability of the candidate to do the job. SGR will make a serious and sincere effort to encourage qualified applicants from underrepresented demographic groups to apply. Although SGR cannot guarantee the makeup of the semifinalist or finalist groups, SGR has relationships and contacts nationwide to encourage the meaningful participation of

underrepresented minority groups, and we continue to evaluate and improve our processes by embedding a lens of equity and inclusion into our recruitment practices.

Listening to Your Unique Needs

SGR devotes significant time to actively listening to your organization and helping you define and articulate your needs. We work hard to conduct a comprehensive recruitment that is unique to you. SGR dedicates a prodigious amount of energy to understanding your organization's unique culture, environment, and local issues to ensure a great fit regarding values, philosophy, and management style perspectives.

Trust of Candidates

SGR has a track record of providing remarkable confidentiality and wise counsel to candidates and next generation leaders. We have earned their trust. As a result, SGR is able to bring exceptional prospects to the applicant pool. Candidates trust SGR to assess the situation well, communicate honestly, and maintain their confidentiality to the greatest extent possible.

Accessibility & Communication

Your executive recruiter is accessible throughout the recruitment process and can be reached at any time by candidates or clients via cell phone or email. In addition, the recruiter communicates with active applicants on a weekly basis to keep the applicants informed about the community and opportunity.

Comprehensive Evaluation and Vetting of Candidates

SGR offers a screening process that ensures a detailed understanding of candidate backgrounds and prevents surprises. Our vetting process includes:

- Prescreening questions and technical review of resumes
- Cross communication between our recruiters about candidates who have been in previous searches for greater understanding of background and skills
- Comprehensive written questionnaires to gain insights beyond what is available through a resume
- Online pre-recorded video interviews that allow search committee members to view candidates in an interview setting prior to the finalist recruitment stage
- All-inclusive media reports that far surpass automated Google/LexisNexis searches, customized to each candidate based on where they have lived and worked
- Thorough automated, anonymous reference checks that provide details on candidates' soft skills from an expansive group of references
- Psychometric assessments (supplemental cost)
- Comprehensive background checks completed by a licensed private investigation firm
- Advanced exercise for finalist candidates, customized to the organization

View a full list of our Executive Recruitment Clients at: <https://sgr.pub/ERClientList>

Project Personnel

Doug Thomas, Executive Vice President

DouglasThomas@GovernmentResource.com

Cell: 863-860-9314



Doug has close to 35 years of senior local government executive management experience. He joined Strategic Government Resources (SGR) in 2015 to serve as their first Regional Director to serve both Florida and the southeast, and subsequently as Senior Vice President. He assists clients nationwide in the areas of executive recruitment, governing body/senior staff governance and servant leadership training, strategic visioning, and priority-based budgeting, evaluation of the Chief Executive, and is a regular speaker at local government state and national conferences.

Prior to his work with SGR, Doug served as City Manager for the City of Lakeland, Florida for roughly 12 years. Lakeland is centrally located along the I-4 corridor between Tampa and Orlando with a resident population of over 100,000 and a service population of over 250,000. The City provides its residents a full array of municipal services, including a municipal-owned electric generation and distribution utility that is the 3rd largest in the state and among the top 25 nationwide. The organization has an annual budget of approximately \$600 million and employs roughly 2,500 personnel. The city is home to the Detroit Tigers during Major League Baseball's Spring Training; the Experimental Aircraft Association's Annual Sun 'n Fun Fly-in, recognized as America's second largest aviation event of its type; Florida Southern College, which features the world's largest one-site collection of buildings designed by the legendary architect, Frank Lloyd Wright; and the state's 12th university, Florida Polytechnic University, which opened in the fall of 2014.

Prior to Lakeland, Doug previously served as City Manager for the City of Alma, Michigan for close to 15 years. Prior to his service in Alma, he represented the City of Grand Haven, Michigan as Assistant City Manager, (1986-1989) and as Administrative Assistant to the City Manager (1984-1985). He also has held local government posts with the City of Rockville, Maryland, and the Town of Landover Hills, Maryland.

His academic credentials include attainment of a Master of Public Administration from the American University, Washington, D.C. in 1983 with a concentration in Urban Affairs, and a Bachelor of Arts in Political Science and History from Bowling Green State University, Ohio in 1981.

Recruitment Methodology

A full-service recruitment typically entails the following steps:

1. Organizational Inquiry and Analysis

- Development of Recruitment Plan and Timeline
- Individual Interviews with Key Stakeholders
- Creation of Position Profile Brochure

2. Advertising and Marketing, Communication with Applicants and Prospects

3. Initial Screening and Review; Narrow to up to 15 Semifinalist Candidates

4. Evaluation of Semifinalist Candidates

- Written Questionnaires
- Recorded Online Interviews
- Comprehensive Media Searches

5. Citizen Committee Briefing to Facilitate Selection of Finalists

6. Evaluation of Finalist Candidates

- Comprehensive Background Investigation Reports
- DiSC Management Assessments (supplemental service)
- First Year Game Plan or Other Advanced Exercise

7. Interview Process

- Face-to-Face Interviews
- Stakeholder Engagement (if desired)
- Deliberations
- Reference Checks (may occur earlier in process)

8. Negotiations and Hiring Process

- Determination of Terms of an Offer
- Negotiation of Terms and Conditions of Employment
- Press Release (if requested)

Step 1: Organizational Inquiry and Analysis

Development of Recruitment Plan and Timeline

SGR will meet with the client at the outset of the project to finalize the recruitment plan and timeline. At this time, SGR will also request that the client provide us with photos and information on the community, organization, and position to assist us in drafting the position profile brochure.

Individual Interviews with Key Stakeholders

SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your particular needs. Fully understanding your organizational needs is the most critical part of conducting a successful executive recruitment. In consultation with the Search Committee, SGR will develop a list of individuals to meet with about the position. These interviews identify issues that may affect the dynamics of the recruitment, as well as develop a composite understanding of the position, special considerations, and the political environment. This process helps with organizational buy-in and will assist us in developing the position profile.

Development of Position Profile Brochure

Following the individual interviews, SGR will develop a draft position profile brochure that is reviewed and revised in partnership with your organization until we are in agreement that it accurately reflects the sought-after leadership and management characteristics.

To view sample recruitment brochures, please visit:

<https://sgr.pub/OpenRecruitments>

Step 2: Advertising and Marketing, Communication with Applicants and Prospects

Advertising and Marketing

The Executive Recruiter and client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, where your position will be announced, reaches over 45,000 subscribers in all 50 states. We will also send targeted emails to opt-in subscribers to SGR's Job Alerts. Your position will be posted on SGR's Website, <https://sgr.pub/SGRWebsite>, and on SGR's Job Board, <https://sgr.pub/SGRJobBoard>. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on Facebook, Twitter, Instagram, and LinkedIn. Ads are also typically placed in various state and national publications, targeting the most effective venues for reaching qualified candidates for that particular position.

Communication with Prospects

SGR communicates with interested prospects on ongoing basis during the recruitment process. Outstanding prospects often will not submit a resume until they have done considerable homework on the available position. A significant number of inquiries will be made, and it is essential that the executive search firm be prepared to answer those questions with fast,

accurate, and complete information, and in a warm and personal manner. This is one of the first places a prospective candidate will develop an impression about the organization, and it is an area in which SGR excels.

Communication with Active Applicants

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personal responses to any questions or inquiries. SGR communicates frequently with applicants to ensure they stay enthusiastic and informed about the opportunity. SGR sends weekly updates to active applicants regarding the organization and community.

Step 3: Initial Screening and Review; Narrow Pool to up to 15 Semifinalist Candidates

SGR uses a triage process to identify high-probability, medium-probability, and low-probability candidates. The triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues regarding previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process described above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to ensure that the minimum requirements of the position are met and determine which preferred requirements are met. This sifting process assesses how well candidates' applications fulfill the recruitment criteria outlined in the Position Profile.

Step 4: Evaluation of Semifinalist Candidates

Reviewing resumes is an important and valuable step in the executive recruitment process. However, resumes can be misleading. Resumes fail to disclose the individual's personal qualities and his or her ability to get along with other people. Resumes can also exaggerate or inflate accomplishments and experience. SGR's responsibility is to go deeper than the resume to ensure that those candidates who continue in the process are truly outstanding. SGR's goal is to have a clear understanding of the person behind the resume and what makes them an outstanding prospect for you. The evaluation of semifinalist candidates includes follow-up when appropriate to ask any questions about underlying issues.

Written Questionnaires

SGR will ask semifinalist candidates to complete a comprehensive written exercise designed to provide greater insight into candidate thought processes and communication styles. SGR's written instrument is custom designed around the priorities identified by the Search Committee and usually includes questions focusing on key areas of particular interest to the client. This written instrument will be included in the semifinalist briefing book along with cover letters and resumes submitted by the candidates.

Recorded Online Interviews

SGR will ask semifinalist candidates to complete online interviews. This provides a very insightful, efficient and cost-effective way to gain additional insights to utilize in selecting finalists you want to invite for an onsite interview. The recorded online interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Online interviews also convey to candidates that the organization is using leading edge technology in its business processes and provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest. Links to view the online interviews are emailed to the Search Committee members for viewing at their convenience prior to selection of finalist candidates.

Comprehensive Media Searches

“Stage 1” of our media search process involves the use of the web-based interface Nexis Diligence™. This platform is an aggregated subscription-based platform that allows access to global news, business, legal, and regulatory content. These media reports at the semifinalist stage have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any “red flags” to the Search Committee immediately upon discovery.

“Stage 2” of our media search process includes the web-based interface Nexis Diligence™ along with Google as a supplementary tool. By utilizing both, we can provide our clients with an enhanced due diligence process to help vet potential candidates in an efficient and comprehensive manner, which reduces the risk of overlooking important information.

The Stage 2 media search consists of a more complex search, which also includes social media platforms, and has proven helpful in analyzing possible adverse news about the candidate by uncovering issues that may not have been previously disclosed by the candidate. The media search gives the Search Committee an overview of the type and extent of press coverage that a candidate has experienced over the course of their career. View a sample media report at: <https://sgr.pub/SGRMediaReport>.

Step 5: Citizen Committee Briefing / Selection of Finalist Candidates

Prior to this briefing, SGR will provide each member of the Search Committee with a briefing book on the semifinalist candidates. The briefing book includes cover letters, resumes, and completed questionnaires. The link to view the online interviews is emailed separately to Search Committee members. The purpose of this briefing is to facilitate narrowing the list to up to 5 finalists who will be invited for personal interviews.

Step 6: Evaluation of Finalist Candidates

Comprehensive Background Investigation Reports

Through SGR's partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below. View a sample background report at: <https://sgr.pub/SGRBackgroundReport>.

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report (if desired)
- Federal criminal search
- National criminal search
- County wants and warrants for previous 10 years
- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)
- County civil and criminal search (for every county in which candidate has lived or worked) for previous 10 years
- Education verification
- Employment verification (if desired)
- Military verification (if desired)

DiSC Management Assessments (supplemental service)

SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager. View a sample report at: <https://sgr.pub/SGRDiSCReport>. For assessments of more than two candidates, a DiSC Management Comparison Report is included, which provides a side-by-side view of each candidate's preferred management style. View a sample comparison report at: <https://sgr.pub/SGRDiSCCompare>.

First Year Game Plan or Other Advanced Exercise

SGR will work with your organization, if desired, to develop an advanced exercise for the finalist candidates. One example of such an exercise is a "First Year Game Plan," a process where finalist candidates are provided with the contact information for elected officials, key staff, and community leaders and then given free rein to make contact with all of them in advance and use those insights to develop a "first year game plan" based on what they know so far. Feedback is received from the key contacts on their impressions of the finalist candidates from the interactions with the candidates prior to the interviews. This exercise provides the opportunity to evaluate candidates' written and interpersonal communication skills, as well as critical analysis skills.

Step 7: Interview Process

Face-to-Face Interviews

SGR will schedule interviews at a date/time convenient to your organization. This process can be as simple, or as complex, as your organization desires. SGR will help you determine the specifics and assist in developing the interview schedule and timeline. SGR will prepare sample interview questions and will participate throughout the process to make it smooth and efficient.

Stakeholder Engagement

At the discretion of the Search Committee, we will work closely with your organization to engage stakeholders in the recruitment process. Our recommendation is that we design a specific stakeholder engagement process after we learn more about the organization and the community. Different approaches work best in different communities. We will collaborate with your organization to determine which option, or combination of options, will be the most effective for the unique needs of the organization.

- Stakeholder survey (supplemental service, can be provided at an additional cost)
- Interviewing community leaders at the outset of the recruitment;
- Holding a public forum for citizen engagement at the outset of the recruitment;
- Community leader reception;
- Meet and greet;
- Search Committee and key community leader dinner meeting;
- “Round Robin” forum meetings with various community groups during a multi-day interview process.

Deliberations

SGR will facilitate a discussion about the finalist interviews and assist the Search Committee in making a hiring decision or in deciding whether to bring back one or more candidates for a second interview.

Reference Checks

SGR uses a progressive and adaptive automated reference check system to provide insights on candidates’ soft skills from a well-rounded group of references. References may include elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, and civic leaders. SGR’s reference check platform is anonymous, which is proven to encourage more candid and truthful responses, in turn providing organizations with more meaningful and insightful information on candidates. SGR provides a written summary report to the organization once all reference checks are completed. The timing of reference checks may vary depending on the specific search process and situation. If the names of the finalists are made public prior to interviews, SGR will typically contact references prior to the interview process. If the names of the finalists are not made public prior to interviews, SGR will typically wait until the organization has selected its top candidate before calling references in order to protect candidate confidentiality.

Step 8: Negotiations and Hiring Process

Determine the Terms of an Offer

Upon request, SGR will provide appropriate employment agreement language and other helpful information to assist you in determining an appropriate offer to extend to your candidate of choice.

Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will determine and define any special needs or concerns of the chosen candidate, including anything that could be a complicating factor. SGR is experienced and prepared to help craft win-win solutions to negotiation “log-jams.”

Press Release (if requested)

Until you have “sealed the deal,” you should be cautious in order to avoid the embarrassment of a premature announcement that does not work out. It is also best practice to notify all senior staff and unsuccessful candidates before they read about it in the newspaper. SGR will assist with this coordination and with drafting any announcements or press releases.

Satisfaction Surveys

SGR is committed to authentically following the golden rule by providing prompt, professional and excellent communication and always treating every client with honor, dignity and respect. We ask clients and candidates to complete a brief and confidential survey after the completion of their recruitment. This helps us strive to continuously improve our processes and meet the changing needs of the workforce.

Supplemental Service: Post-Hire Team Building Workshop

SGR can provide a customized team building workshop after you hire for the position. SGR utilizes I-OPT, which is a validated measurement tool that shows how a person perceives and processes information. Because people “see” different things when they assess a situation, they are motivated to take various courses of action, so understanding you and your colleagues’ I-OPT Profiles will enable you to work much more effectively as a team. This service can be provided at an additional cost. View sample I-OPT reports at: <https://sgr.pub/SampleIOPT>.

Projected Schedule

Holidays may affect recruitment schedule.

Task	Weeks
- Contract Executed - Develop Recruitment Plan, Timeline <u>Individual Interviews with Key Stakeholders</u>	Week 1
<u>Deliverable</u>: Position Profile Brochure - Search Committee Reviews and Approves Brochure	Weeks 2-3
- Advertising and Marketing - Accept Applications - Communication with Prospects and Applicants	Weeks 4-7
- Initial Screening and Review - Narrow to up to 15 semifinalists - Questionnaires and Recorded Online Interviews - Comprehensive Media Searches	Weeks 8-10
<u>Deliverable</u>: Semifinalist Briefing Books and Online Interviews	Week 11
<u>Citizen Committee Briefing</u> / Select Finalist Candidates	Week 12
- Comprehensive Background Investigation Reports - DiSC Management Assessments (supplemental service) - First Year Game Plan or Other Advanced Exercise	Week 13
<u>Deliverable</u>: Finalist Briefing Books	Week 14
<u>Face-to-Face Interviews</u> - Stakeholder Engagement (may occur earlier in process) - Deliberations - Reference Checks (may occur earlier in process) - Negotiations and Hiring Process	Week 15

Recruitment Costs & Service Guarantee

Not-to-Exceed Price: **\$29,825 ***

** Ad placement costs are not included in the Not-to-Exceed Price. Ad placement costs are estimated to be between \$1,750 and \$2,500 and shall be added to the total cost of services upon approval from the organization.*

Not-to-exceed price includes:

- **Professional Service Fee - \$18,500**
- **Expenses:**
 - **Position Profile Brochure & Marketing - \$750** (*reflects \$750 discount*)
 - Production of a professional position profile brochure
 - Custom-designed graphics for social media and email marketing
 - Announcement in SGR's 10 in 10 Leadership and Innovation e-newsletter
 - Two (2) email blasts to SGR's opt-in Job Alert subscribers for the relevant job category
 - Featured job placement on SGR's website
 - Featured ad on SGR's job board
 - Promotions on SGR's social media pages – Facebook, Twitter, LinkedIn, and Instagram
 - **Semifinalist Recorded Online interviews** for up to fifteen (15) semifinalists - **\$225 each**
 - **Comprehensive Media Reports** for up to fifteen (15) semifinalists - **\$500 each**
 - **Comprehensive Background Investigation Reports** for up to five (5) finalists - **\$400 each**
 - **Comprehensive Reference Checks** with individual reports for up to five (5) finalists - **\$225 each**
 - **Up to two (2) multi-day onsite visits** by one Recruiter to the Organization, for up to 2 and 1/2 days per visit. Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost, with no markup for overhead. *Travel will be dependent on COVID restrictions in place at the time and take into consideration the health and safety of team members of both SGR and the Organization.*

Reimbursable Expenses

- **Ad placements, as approved by the organization, will be billed back at actual cost with no markup for overhead.**

Supplemental Services

The supplemental services listed below are not included in the not-to-exceed price:

- Additional online interviews (over and above the fifteen (15) included in the not-to-exceed price above) are offered for \$225 per candidate.
- Additional comprehensive media reports (over and above the fifteen (15) included in the not-to-exceed price above) are offered for \$500 per candidate.
- Additional background investigation reports (over and above the five (5) included in the not-to-exceed price above) are offered for \$400 per candidate.
- Additional reference checks (over and above the five (5) included in the not-to-exceed price above) are offered for \$225 per candidate.
- There is a cost of \$175 per candidate for the DiSC Management Profile.
- Semifinalist and finalist briefing materials will be provided to the search committee via an electronic link. Should the organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits (over and above the two (2) onsite visits included in the not-to-exceed price above) by one Recruiter will be billed over and above the not-to-exceed price. Travel and onsite time will be billed at a professional fee (per recruiter) of \$1,000 per half-day and \$1,500 per full day. Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost, with no markup for overhead.
- Candidates are reimbursed directly by the organization for travel expenses.
- SGR will conduct a Stakeholder Survey for \$1,000. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to the organization.
- A half-day onsite post-hire team building workshop is offered for \$4,000, plus travel expenses and \$150 per person for I-OPT reports.
- If the organization desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval.

Billing

The professional service fee for the recruitment is billed in three equal installments during the course of the recruitment. The initial installment is billed after the position profile brochure has been created. The second installment is billed after semifinalists are selected. The final installment is billed at the conclusion of the recruitment. Expenses and supplemental services will be billed with each of the three installments, as appropriate.

Service Guarantee

SGR guarantees that you will be satisfied with the results of the full service recruitment process, or we will repeat the entire process one additional time and charge only for expenses. Additionally, if you select a candidate (that SGR has fully vetted) who resigns or is released within 18 months of their hire date, SGR will repeat the process one additional time and charge only for expenses. If the organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the service guarantee is null and void. We also guarantee that we will not directly solicit a candidate we bring to you for another job.

City & County Management Recruitments, 2018-Present

In Progress

- Boardman, Oregon (pop. 4,500) - City Manager
- Dobbs Ferry, New York (pop. 11,000) - Village Administrator
- Gatesville, Texas (pop. 16,000) - City Manager
- Great Bend, Kansas (pop. 15,000) - City Administrator
- Justin, Texas (pop. 5,000) - City Manager
- Mexia, Texas (pop. 7,000) - City Manager
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Ottawa, Kansas (pop. 12,500) - City Manager
- Parker, Arizona (pop. 3,500) - Town Manager
- Pearland, Texas (pop. 130,000) - City Manager
- Rowlett, Texas (pop. 68,000) - City Manager
- Snyder, Texas (pop. 11,000) – City Manager
- Stillwater, Oklahoma (pop. 48,000) - City Manager
- Williston, North Dakota (pop. 29,000) - City Administrator

2023

- Bristol, Tennessee (pop. 27,000) - City Manager
- Glastonbury, Connecticut (pop. 35,000) - Town Manager
- Laredo, Texas (pop. 256,000) - City Manager
- Shawnee, Kansas (pop. 69,000) - City Manager

2022

- Aledo, Texas (pop. 5,500) - City Manager
- Blaine, Washington (pop. 6,000) - City Manager
- Crandall, Texas (pop. 4,000) - City Manager
- Dalhart, Texas (pop. 8,500) - City Manager
- Edinburg, Texas (pop. 100,000) - City Manager
- Frisco, Colorado (pop. 3,000) - Town Manager
- Graham, Texas (pop. 8,000) - City Manager
- Hutto, Texas (pop. 40,000) - City Manager
- Johnston, Iowa (pop. 24,000) - City Administrator
- Kennebunk, Maine (pop. 11,000) - Town Manager
- Kennedale, Texas (pop. 9,000) - City Manager

- Ketchikan, Alaska (pop. 8,000) - City Manager/Public Utilities General Manager
- Klamath Falls, Oregon (pop. 22,000) - City Manager
- Leawood, Kansas (pop. 34,000) - City Administrator
- Levelland, Texas (pop. 14,000) - City Manager
- Live Oak, Texas (pop. 16,000) - City Manager
- Madisonville, Texas (pop. 4,500) - City Manager
- Manor, Texas (pop. 15,000) - City Manager
- Marshall, Texas (pop. 23,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Mont Belvieu, Texas (pop. 8,000) - City Manager
- Montgomery, Texas (pop. 2,400) - City Administrator
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Parkville, Missouri (pop. 7,000) - City Administrator
- Rocky Hill, Connecticut (pop. 21,000) - Town Manager
- Sunnyvale, Texas (pop. 8,000) - Town Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Walla Walla, Washington (pop. 34,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator
- Wethersfield, Connecticut (pop. 26,000) - Town Manager
- Wickenburg, Arizona (pop. 7,500) - Town Manager

2021

- Bainbridge Island, Washington (pop. 25,000) - City Manager
- Breckenridge, Texas (pop. 5,000) - City Manager
- Bridgeport, Texas (pop. 6,500) - City Manager
- Briarcliff Manor, New York (pop. 8,000) - Village Manager
- Chandler, Arizona (pop. 270,000) - City Manager
- Chanhassen, Minnesota (pop. 27,000) - City Manager
- Chickasha, Oklahoma (pop. 16,000) - City Manager
- Choctaw, Oklahoma (pop. 12,000) - City Manager
- Clermont, Florida (pop. 44,000) - City Manager
- Flower Mound, Texas (pop. 79,000) - Town Manager
- Johnson City, Tennessee (pop. 65,000) - City Manager
- Kennett Square, Pennsylvania (pop. 6,000) - Borough Manager
- Lago Vista, Texas (pop. 8,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator
- Monett, Missouri (pop. 9,000) - City Administrator
- North Port, Florida (pop. 77,000) - City Manager

- Port Chester, New York (pop. 30,000) - Village Manager
- Sherwood, Oregon (pop. 20,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Spokane, Washington (pop. 220,000) - City Administrator

2020

- Argyle, Texas (pop. 4,000) - Town Administrator
- Bay City, Texas (pop. 17,000) - City Manager
- Bedford, Texas (pop. 49,000) - City Manager
- Boerne, Texas (pop. 16,000) - City Manager
- Castroville, Texas (pop. 3,000) - City Administrator
- Clinton, Connecticut (pop. 13,500) - Town Manager
- Commerce, Texas (pop. 9,000) - City Manager
- Covington, Georgia (pop. 14,000) - City Manager
- DeSoto, Texas (pop. 56,000) - City Manager
- Duncanville, Texas (pop. 40,000) - City Manager
- Hutchinson, Kansas (pop. 42,000) - City Manager
- Hutto, Texas (pop. 30,000) - City Manager
- Iola, Kansas (pop. 5,500) - City Administrator
- Johns Creek, Georgia (pop. 84,000) - City Manager
- Joplin, Missouri (pop. 50,000) - City Manager
- Miami, Oklahoma (pop. 13,500) - City Manager
- Mission Hills, Kansas (pop. 3,500) - City Administrator
- Nacogdoches, Texas (pop. 33,000) - City Manager
- Santa Fe, Texas (pop. 13,000) - City Manager
- Tigard, Oregon (pop. 53,000) - City Manager
- Westworth Village, Texas (pop. 3,000) - City Administrator

2019

- Blaine, Minnesota (pop. 65,000) - City Manager
- Bullard, Texas (pop. 4,000) - City Manager
- Campbell County, Wyoming (pop. 46,000) - Commissioners' Administrative Director/County Administrator
- Canyon, Texas (pop. 15,000) - City Manager
- Copperas Cove, Texas (pop. 34,000) - City Manager
- Killeen, Texas (pop. 145,000) - City Manager
- Kingsville, Texas (pop. 26,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator

- Lenexa, Kansas (pop. 55,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Orange, Texas (pop. 19,000) - City Manager
- Palm Coast, Florida (pop. 86,000) - City Manager
- South Windsor, Connecticut (pop. 26,000) - Town Manager
- Springfield, Oregon (pop. 62,000) - City Manager
- Terrell, Texas (pop. 17,000) - City Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Vail, Colorado (pop. 5,000) - Town Manager
- Venus, Texas (pop. 5,000) - City Administrator
- Victoria, Texas (pop. 67,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator

2018

- Anna, Texas (pop. 14,000) - City Manager
- Bethany, Oklahoma (pop. 19,000) - City Manager
- Cameron, Missouri (pop. 10,000) - City Manager
- Clackamas County, Oregon (pop. 400,000) - County Administrator
- Clallam County, Washington (pop. 75,000) - County Administrator
- Coffeyville, Kansas (9,500) - City Manager
- Craig, Colorado (pop. 9,000) - City Manager
- Erie, Colorado (pop. 26,000) - Town Administrator
- Forney, Texas (pop. 19,000) - City Manager
- Freeport, Texas (pop. 12,000) - City Manager
- Fulshear, Texas (pop. 9,500) - City Manager
- Green Cove Springs, Florida (pop. 7,500) - City Manager
- Humble, Texas (pop. 15,000) - City Manager
- Jacksonville, Texas (pop. 14,000) - City Manager
- Jupiter, Florida (pop. 60,000) - Town Manager
- Lawton, Oklahoma (pop. 94,000) - City Manager
- Lebanon, Missouri (pop. 15,000) - City Administrator
- Lockhart, Texas (pop. 13,500) - City Manager
- Marshall, Texas (pop. 24,000) - City Manager
- Murfreesboro, Tennessee (pop. 130,000) - City Manager
- Nixa, Missouri (pop. 21,000) - City Administrator
- Paducah, Kentucky (pop. 25,000) - City Manager
- Pflugerville, Texas (pop. 60,000) - City Manager
- Plant City, Florida (pop. 38,000) - City Manager

- Riverside, Missouri (pop. 3,000) - City Administrator
- Smithville, Missouri (pop. 10,000) - City Administrator
- Springfield, Missouri (pop. 167,000) - City Manager
- Sunnyvale, Texas (pop. 6,500) - Town Manager
- West University Place, Texas (pop. 14,000) - City Manager
- Wethersfield, Connecticut (pop. 26,000) - Town Manager

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "A"
CONTACT SHEET

Name: Jeri J. Peters

Federal Taxpayer ID: 460501585

Mailing Address: PO Box 1642

City, State, & Zip Code: Keller, TX 76244

Telephone: 817-337-8581 **Fax:** N/A

Email: JJPeters@governmentresource.com

Submitted By: Jeri J. Peters

Title: President of Executive Recruitment

Accounting Contact:

Name: Jennifer Brohimer **Title:** Finance Director

Email Address: JenniferBrohimer@governmentresource.com **Phone:** 817-337-8581

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "B"

SWORN STATEMENT UNDER F.S. SECTION 287.133(3) (A), ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.
2. This sworn statement is submitted by (entity) Strategic Government Resources, Inc whose business address is PO Box 1642, Keller, TX 76244 and (if applicable) Federal Employer Identification Number (FEIN) is 460501585 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)
3. My name is Jeri J. Peters and my relationship to the entity named above is President of Executive Recruitment
4. I understand that a "public entity crime" as defined in Paragraph 287.133(a) (g). Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a) (b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime; or
 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Fernandina Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

 X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

 The person or affiliate was placed on the convicted FIRM list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted FIRM list. (Please attach a copy of the final order.)

 The person or affiliate has not been placed on the convicted FIRM list. (Please describe any action taken by, or pending with, the Department of General Services.)


Signature

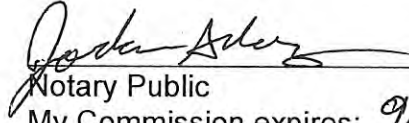
3/23/2023

Date:

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

Oregon J.A
STATE OF ~~FLORIDA~~
COUNTY OF Clackamas

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23 day of March, 2023, and is personally known to me, or has provided OCL as identification.


Notary Public
My Commission expires: 9/22/2026



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "C"
DRUG-FREE WORKPLACE CERTIFICATION

The below-signed INDIVIDUAL/FIRM certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

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

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: Strategic Government Resources, Inc.

CITY: Keller STATE: TX ZIP CODE: 76244

SIGNATURE:  PHONE: 817-337-8581

NAME (TYPED OR PRINTED): Jeri J. Peters TITLE: President of Executive Recruitment

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: RFP 23-07

Project Description: Executive Recruitment Services

I/FIRM acknowledges and agrees to the following:

I/FIRM shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the FIRM during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the FIRM to perform work pursuant to the contract with the Department.

Individual/Company/Firm: Strategic Government Resources, Inc.

Authorized Signature: 

Title: Jeri J. Peters, President of Executive Recruitment

Date: 3/23/2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

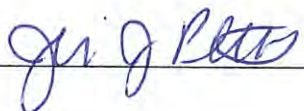
EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or firm presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document.

1. INTRODUCTION AND GENERAL INFORMATION
Understands and agrees to all terms.
2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
Understands and agrees to all terms.
3. EVALUATION AND CONTRACT OVERVIEW
Understands and agrees to all terms.
4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
Understands and agrees to all terms.
5. PROPOSER'S RESPONSE: PROPOSED TEAM
Understands and agrees to all terms.
6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
Understands and agrees to all terms.

Name: Jeri J. Peters Title: President of Executive Recruitment

Signature:  Date: 3/23/2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Strategic Government Resources, Inc. whose business address is PO Box 1642, Keller, TX 76244 and (if applicable) Federal Employer Identification Number (FEIN) is 460501585 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Jeri J. Peters and my relationship to the entity named above is President of Executive Recruitment

1. The above-named entity is submitting a Proposal for the City of Fernandina Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Fernandina Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Fernandina Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Fernandina Beach.


Signature

3/23/2023
Date:

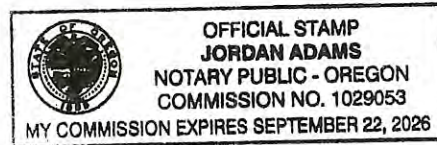
CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

Oregon JA
STATE OF ~~FLORIDA~~
COUNTY OF Clackamas

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23 day of March, 2023, and is personally known to me, or has provided OdL as identification.


Notary Signature

My Commission expires: 9/22/2026



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Strategic Government Resources, Inc. whose business address is PO Box 1642, Keller, TX 76244 and (if applicable) Federal Employer Identification Number (FEIN) is 460501585 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Jeri J. Peters and my relationship to the entity named above is President of Executive Recruitment

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Fernandina Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Oregon JA
STATE OF ~~FLORIDA~~
COUNTY OF Clackamas

Jeri J. Peters
Signature

3/23/2023
Date:

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23 day of March, 2023, and is personally known to me, or has provided ODE as identification.

Jordan Adams
Notary Signature

My Commission expires: 9/22/2026

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "H"

DISPUTES DISCLOSURE FORM

Answer the following questions by placing an "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES ___ NO X ___

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES ___ NO X ___

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES ___ NO X ___

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Fernandina Beach.

Strategic Government Resources, Inc.

Firm

3/23/2023

Date



Authorized Signature

Jeri J. Peters, President of Executive Recruitment

Printed or Typed Name and Title

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

Caroline Best

From: Denise Matson
Sent: Monday, April 10, 2023 1:08 PM
To: JJ Peters
Cc: Tammi Bach; Caroline Best; Doug Thomas
Subject: RE: City Manager Search Firm - Resolution 2023-50

Good Afternoon Ms. Peters,

Thank you for the clarification.

The full proposal from SGR will be considered by the City Commission at the April 18th City Commission Meeting. If you have any questions, please feel free to contact me. Thank you.

Denise Matson
HR Director
City of Fernandina Beach
204 Ash St.
Fernandina Beach, Florida 32034
(904) 310-3129 | dmatson@fbfl.org
www.fbfl.us



If this email is related to the Board, Committee or Commission that you serve on, please DO NOT REPLY TO ALL.

Disclaimer: According to Florida Public Records Law, email correspondence to and from the City of Fernandina Beach, including email addresses and other personal information, is public record and must be made available to the public and media upon request, unless otherwise exempted by the Public Records Law. If you do not want your email address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

From: JJ Peters <jjpeters@governmentresource.com>
Sent: Thursday, April 6, 2023 7:00 PM
To: Denise Matson <dmatson@fbfl.org>
Cc: Tammi Bach <tbach@fbfl.org>; Caroline Best <cbest@fbfl.org>; Doug Thomas <DouglasThomas@governmentresource.com>
Subject: Fwd: City Manager Search Firm - Resolution 2023-50

CAUTION: This email originated from outside the organization. Do not click links or open attachments unless you recognize the sender, were expecting this email, and know the content is safe.

Good Evening Ms. Matson,

My apologies for the slower than typical reply. I've been in meetings most of the day today and am just catching up on emails and Doug is currently on site for another client engagement.

I'm very sorry for any confusion on our proposal. While we have been able to offer Fernandina Beach component searches for a number of department level positions, we only offer our full service search process for positions, such as City Manager, that report to a governing body. If it would be helpful, we'd be more than happy to discuss the reasons for this and some considerations the Commission may want to make as they are deciding how they'd like to proceed.

If the decision is made to conduct your own recruitment, we do offer marketing and advertising services as well as some stand alone candidate vetting services (please see attached), however, please note these services would not include the service guarantee provided with our fully vetted full service search.

Again, I apologize for any confusion. Regardless of how you decide to proceed, we wish you all the best in this important search!

Warmest regards,

JJ Peters

President, Executive Recruitment

SGR

www.GovernmentResource.com

main office: 817-337-8581 | direct office: 817-753-3153 | cell: 503-502-0891

"Recruiting, Assessing, and Developing Innovative, Collaborative, Authentic Leaders"

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----- Forwarded message -----

From: **Denise Matson** <dmatson@fbfl.org>

Date: Thu, Apr 6, 2023 at 8:03 AM

Subject: City Manager Search Firm - Resolution 2023-50

To: jjpeters@governmentresource.com <jjpeters@governmentresource.com>,

douglasthomas@governmentresource.com <douglasthomas@governmentresource.com>

Cc: Tammi Bach <tbach@fbfl.org>, Caroline Best <cbest@fbfl.org>

Good Morning Ms. Peters and Mr. Thomas:

The City Commission at their April 4, 2023, Regular Meeting, approved Resolution 2023-20, as amended, to direct staff to contact the executive search firm Strategic Government Resources (SGR) to perform three services: assist with recruiting qualified applicants, vet the qualified applicants, and provide a list of vetted applicants to City staff (This list will be further vetted by the City Manager Search Committee.)

You listed your professional service fee at \$18,500 with other expenses broken down (p. 13 of your proposal). Is the \$18,500 fee able to be reduced or itemized? Would fees differ if the committee handled preparation of the recruitment profile and marketing materials with SGR handling the actual recruitment of qualified applicants, vetting/background/reference checking and advisement to committee members as needed?

I have placed the link to the Commission Meeting below. You can go to agenda item 7.3 to advance the meeting to the City Manager Search Firm discussion.

<https://fernandinabeachfl.new.swagit.com/videos/223364>

If you have any questions, please feel free to contact me at (904) 310-3129, or by email at dmatson@fbfl.org.

Thank you.

Denise Matson
HR Director
City of Fernandina Beach
204 Ash St.
Fernandina Beach, Florida 32034
(904) 310-3129 | dmatson@fbfl.org
www.fbfl.us



If this email is related to the Board, Committee or Commission that you serve on, please DO NOT REPLY TO ALL.

Disclaimer: According to Florida Public Records Law, email correspondence to and from the City of Fernandina Beach, including email addresses and other personal information, is public record and must be made available to the public and media upon request, unless otherwise exempted by the Public Records Law. If you do not want your email address released in response to a public records request, do not send electronic mail to this entity. Instead, contact this office by phone or in writing.

RESOLUTION 2023-50

A RESOLUTION OF THE CITY COMMISSION OF THE CITY OF FERNANDINA BEACH, FLORIDA, AWARDING RFP #23-07 FOR CITY MANAGER EXECUTIVE SEARCH SERVICES TO STRATEGIC GOVERNMENT RESOURCES (SGR); AUTHORIZING EXECUTION; AND PROVIDING FOR AN EFFECTIVE DATE.

WHEREAS, at their March 7, 2023, Workshop, the City Commission discussed the search for a new City Manager and directed staff to issue a Request for Proposals for an executive search firm; and

WHEREAS, the City of Fernandina Beach issued a Request for Proposals (RFP#23-07) from qualified firms for City Manager Executive Search Services; and

WHEREAS, five proposals were received on March 29, 2023. The City Commission, at their April 4, 2023, regular meeting, convened as the evaluation committee to discuss and rank the proposals based on experience, qualifications, and proposed cost for the scope of work specified; and

WHEREAS, the City Commission believes it to be in the best interest of the City to hire a firm to assist in the process of selecting a new City Manager; and

WHEREAS, the City Commission requested staff contact Strategic Government Resources (SGR) to perform three services contained within their proposal: recruit qualified applicants, vet the qualified applicants, and provide the list of qualified and vetted applicants to City staff. This list will then be vetted by the City Manager Search Committee; and

WHEREAS, when the Fiscal Year 2022/2023 budget was prepared, this expenditure was not anticipated, and a budget amendment will be required.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COMMISSION OF THE CITY OF FERNANDINA BEACH, FLORIDA, THAT:

SECTION 1. The City Commission hereby awards RFP #23-07 for City Manager Executive Search Services to Strategic Government Resources (SGR) to perform three services contained within their proposal: recruit qualified applicants, vet the qualified applicants, and provide the list of qualified and vetted applicants to City staff.

SECTION 2. The Interim City Manager and City Clerk, upon review and approval by the City Attorney, are hereby authorized to execute all documentation pertaining to award of a contract to Strategic Government Resources (SGR).

SECTION 3. This Resolution is effective immediately upon passage.

ADOPTED this 4th day of April, 2023.

CITY OF FERNANDINA BEACH



BRADLEY M. BEAN
Commissioner – Mayor

ATTEST:



CAROLINE BEST
City Clerk

APPROVED AS TO FORM AND LEGALITY:



TAMMI E. BACH
City Attorney



**PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES
FOR
FERNANDINA BEACH, FL**

Volume I: Proposal

RFP 23-07

Colin Baenziger & Associates

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 PROVIDE EXECUTIVE SEARCH FIRM SERVICES

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March 23, 2023

The Honorable Mayor Bradley Bean, Vice-Mayor David Sturges, and Commissioners James Antun, Darron Ayscue, and Ronald "Chip" Ross
Attn: City Clerk's Office – RFP #23-07
City of Fernandina Beach
204 Ash Street
Fernandina Beach, FL 32034

The Honorable Mayor Bean, Vice-Mayor Sturges, and Commissioners Antun, Ayscue, and Ross:

Colin Baenziger & Associates (CB&A) would like to thank you for the opportunity to submit this 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 across the country and found to be extremely effective.

While CB&A is a nationwide municipal recruiting firm, our home base is Florida. In fact, we have been selected to perform 127 of the last 191 recruitments where a Florida city or county has chosen to use a recruiter to find its Manager / Administrator. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients and candidates. 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 elected 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 fit well with you and your community. As a result, we only take a few clients at a time and focus on completing each assignment in an exemplary manner. Further, we routinely complete our work in ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and selection. Finally, we offer one of the better warranties in the industry.

Some of our Florida searches include City Managers for Jacksonville Beach, Aventura, Bay Harbor Islands, Bradenton, Cape Coral, Cutler Bay, Destin, Estero, Fort Myers, Fruitland Park, Gainesville, Hallandale Beach, Islamorada, Lady Lake, Melbourne, Miramar, Mount Dora, Ocala, Orange City, Palm Beach Gardens, Palmetto Bay, Palm Coast, St. Pete Beach, Tavares, Treasure Island, and West Melbourne. Nationally we have found City Managers for Ankeny, IA; Bellevue,

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING

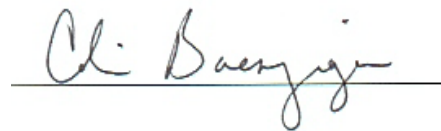
WA; Doraville, GA; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also found the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia) as well as County Managers for Brevard County, FL; Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Polk County, IA; St. Lucie County, FL; St. Johns County, FL; and Union County, NC.

Some of our current searches include City/Town Managers for Belle Isle, FL, Cooper City, FL, Fircrest, WA, Fort Walton Beach, FL, Oakland, FL, Ocean Ridge, FL; a County Administrator for Manatee County, FL; a City Attorney for Sebastian, FL, an Executive Director for Lake County Water Authority, FL; and a General Manager for Sun 'n Lake Improvement District, FL.

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

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

Sincerely,



Colin Baenziger
Principal / Owner

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

I. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

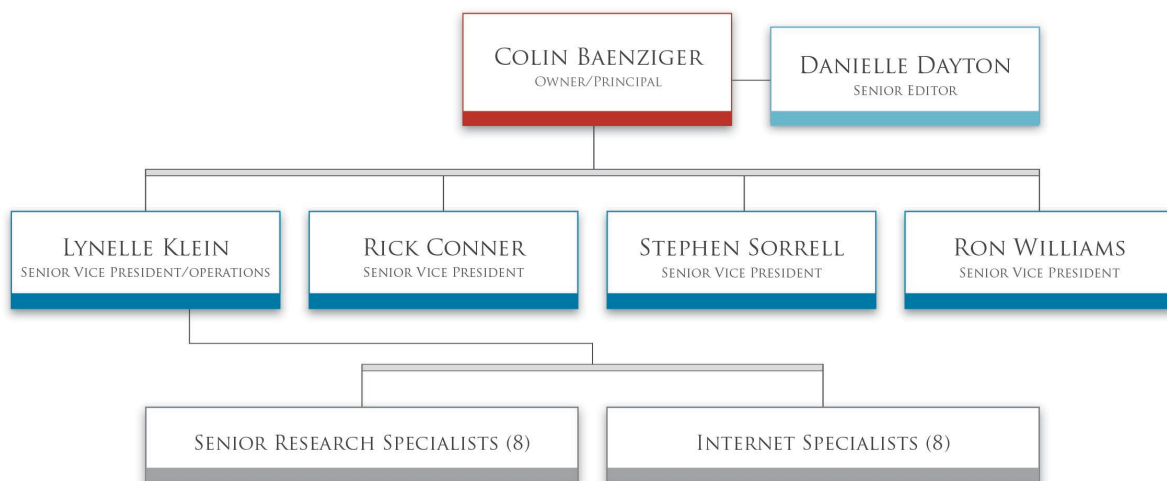
Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with satellite offices in Grand Junction, CO, and Pensacola, FL. As a sole proprietorship, we are not registered with any state as a corporation, foreign or otherwise.

Colin Baenziger & Associates' outstanding reputation is derived from our commitment to the quality of our product and the timeliness of the delivery. Further, our work is not done until you are fully satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our action plan. When we do so, we do not ask for more than the originally quoted price. We feel you are hiring us as your experts and once a contract is signed, we have an obligation to fulfill its requirements with excellence, on time, and within budget. We simply do not believe in unforeseen circumstances.

Since beginning our executive search practice in 1998, we have conducted searches for clients in thirty-four states. Overall, we have sought over 230 CEOs for cities, counties, and special districts. We have also conducted over 415 searches overall. The basic approach outlined herein has been refined to the point where it is problem-free.

Technical Capabilities and Organizational Structure

Colin Baenziger & Associates has developed its business model over the past 26 years, and it has proved to be extremely effective. Our work has focused primarily on Executive Search and our staff is extremely capable and experienced. See Section III for more details. The structure of our firm is outlined below.



I. Qualifications and Experience of the Firm (continued)

Completion of Projects within Budget

Colin Baenziger & Associates is proud of its record of completing searches within budget. Once we quote a price to the client, that price is what the client will pay, no matter how difficult the search is or what circumstances may develop. ***We have never requested anything beyond the originally quoted price, even when we were probably entitled to do so, and we never will.***

Completion of Projects on Schedule

Colin Baenziger & Associates routinely completes its assignments within ninety days. Further, since CB&A began performing recruitments, ***it has never missed a significant 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, 25% of the candidates selected as semi-finalists have been females and/or minorities. In one recent year, 47% of our placements were either females or minorities.

Prior Names and Litigation

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

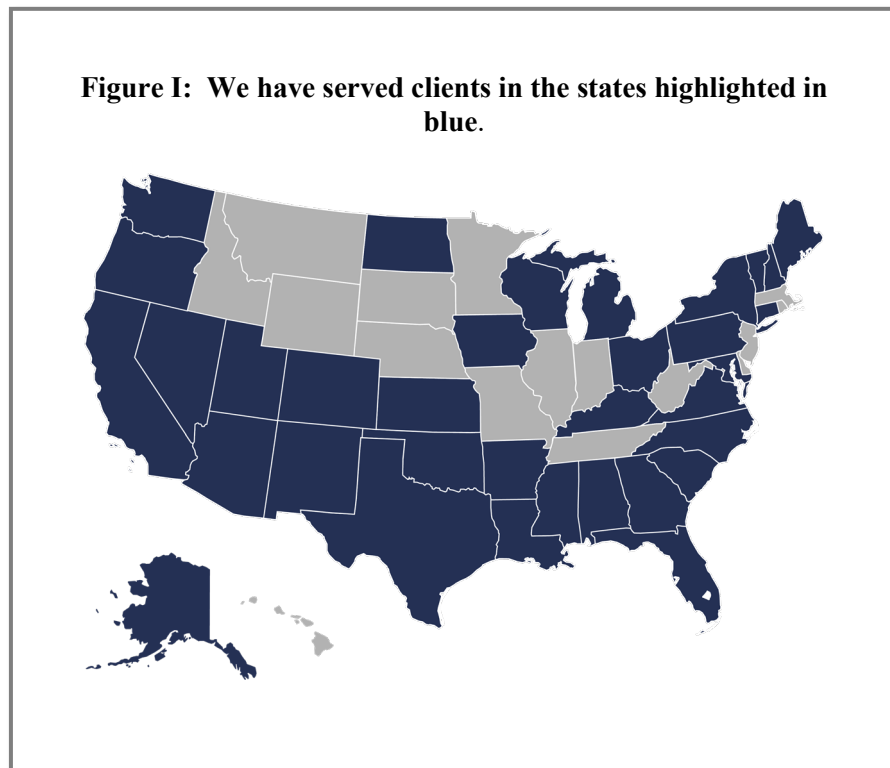
Insurance

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

I. Qualifications and Experience of the Firm (continued)

Geographic Reach

Since initiating its search function in 1998, CB&A has become a nationwide recruiting firm. See Figure I below for the states we have conducted searches in. A complete list of our searches can be found in Appendix A.



II. Proposed Work Plan

The following search methodology has been refined over the past twenty-six years and is virtually foolproof. That said, we will integrate any ideas you have into the process to the extent possible. Our goal is to ensure you have the right people to interview as well as all the information you need to make the right decision.

Phase I: Information Gathering / Needs Assessment / Brochure Preparation

Task One: Needs Assessment

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

- Gather information from the jurisdiction, its website and other sources;
- Interview the elected body and other key parties (such as City staff). 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 include experience, longevity, education, personality, demeanor, skills, and achievements as well as other items you and the community consider important;
- Determine a reasonable compensation package; and
- Finalize the timeline with the City so both the elected body and the candidates will know when the interviews will be held and when they need to be available.

We will also conduct a public workshop with the appointed Citizen Committee to receive its member's input. Further, if the City wishes, we will gladly also conduct a town hall meeting for the public at large to solicit their insights. We can also solicit the input of your residents through an on-line survey (see Appendix D for a sample).

Task Two: Develop Position Description and Recruitment Materials

Based on the information we gather, CB&A will next develop a comprehensive recruitment profile for your review. We will then incorporate any additional suggestions you may have and finalize the document. A sample profile is included as Appendix B. Other examples can be found on our firm's website under the "Executive Recruitments" / "Active Recruitments" tabs.

II. Proposed Work Plan (Continued)

Phase II: Recruitment

Task Three: Recruit Candidates

CB&A uses a number of approaches to identify the right people for your position. We say people (and not person) because our goal is to provide you with six to ten outstanding semi-finalists. 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 potential candidates and consult our data base of government professionals. Being well established in Florida, we know whom we should contact. 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.
- ***Advertising:*** While we will network to find the best, we will not ignore professional organizations and trade press which sometimes yield strong candidates. These will include the Florida League of Cities, International City/County Management Association, the Florida City and County Management Association. Other sources will be organizations and websites who focus on female and minority candidates LinkedIn is another vehicle we may use.
- ***CB&A Website:*** We will also post the recruitment on our website, www.cb-asso.com. With our reputation, many candidates consult it regularly.
- ***Email:*** We will e-mail the recruitment profile through our listserv of almost fourteen thousand managers and professionals who are interested in local government management positions. 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.

We generally do not use local, newspapers, national newspapers or generic websites because while they produce large numbers of applications, they generally do not produce the caliber of candidates we are seeking. If the City wants to have ads placed in these venues, it will need to bear the cost.

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

Based on our most recent recruiting efforts, we anticipate receiving resumes from forty to sixty applicants. We will use the information we developed in Phase I to narrow the field. Selecting strong candidates is, in reality, more of an art than a science and a mixture of in-depth research and subjective evaluation. While we consider standard ranking factors and the elements of the job, ultimately the most important factor is who we believe will be an outstanding fit with the City and the community as your next City Manager. Our work will include working with the Citizen Committee to narrow the field.

II. Proposed Work Plan (Continued)

Specifically, our efforts will involve:

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

Step Two. Screening Interview. Our lead recruiters, and possibly other senior representatives of the firm, will interview each of the top 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 to consider each candidate further.

Step Three. Evaluate the Best Candidates. We will conduct thorough research into the backgrounds of the best six to twelve candidates. Specifically, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to answer a series of questions about themselves as an adjunct to their resumes and cover letters. By so doing, (1) the candidates can tell their story *in their own words* and balance the negativity that is so often characteristic of the press, and (2) the City to evaluate the candidates written communication skills.
- **Interviews of References:** We provide the candidate with the positions of the references with whom we wish to speak. These will include current and former elected officials, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, the Human Resources Director they work with, and others who know the candidate. All told, the list will include approximately 20 individuals. We will also attempt to contact some individuals who are not on the candidate's list. Typically, we reach eight to twelve people and prepare a written approximately page lone 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 litigation at the county and federal level; motor vehicle records; and bankruptcy and credit. As an aside, while only police departments have access to the gold standard for criminal records (the NCIC data base), our vendor has developed a very reliable substitute.
- **Search the Internet, Newspaper Archives, and Social Media:** Virtually every local newspaper has an electronic archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the governing body. Of course, not all news sources are unbiased, and we consider that in our evaluation. Further, we will review the candidate's social media accounts.

II. Proposed Work Plan (Continued)

- **Verification of Education and Work History:** We will verify all claimed educational degrees as well as the candidate's work history for the past 15 years to assure the candidate has been completely forthright.
- **Candidate Disclosure Statement:** We ask candidates to disclose anything controversial in their background that we need to be aware of. While it is unlikely that they will disclose anything we are not already aware of at this point, we believe redundant checks are beneficial.

As part of our efforts, we will crosscheck sources, search for discrepancies, and resolve them. When sensitive or potentially embarrassing items are discovered, they will be thoroughly researched. Depending on what we discover, we may decide to drop the candidate or to present them with an explanation.

Note: We firmly believe that all background work and checks should be completed prior to presenting them to you. That way you will know the individuals you select to interview 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 you have made a selection, you can move forward promptly, negotiate a contract and make an announcement.

Task Five: Preparation and Presentation of Candidate Materials

CB&A will select six to ten candidates and present them for your consideration as finalists. We will provide to you electronically a complete written report for each recommended candidate which will include: the candidate's cover letter, resume, introduction, references, background checks and internet / newspaper archive search results. A complete sample candidate report is included as Appendix C. We will also provide advice on interviewing, a series of questions the elected officials may wish to ask (as well as outlining some areas that it is not wise to get into), and some logistical information.

Task Six: Finalist Selection

Approximately a week after the City has received the candidate materials, CB&A will meet with the Citizen Committee to discuss our findings and for it to select finalists (ideally five with an alternate) to be invited to interview.

Task Seven: Notify All Candidates of Their Status

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

II. Proposed Work Plan (Continued)

CB&A will also contact those not selected to be interviewed. Part of the notification will include advice concerning their application materials, 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 /evaluation process including mechanisms to assess the candidates' communication skills, interpersonal skills, and decision-making skills. Typically, we suggest the Commission observe the finalists in three settings: a social setting (since the selected candidate will frequently represent the City at community functions), one-on-one interviews, and a Commission meeting. The Citizen Committee will play an active role in the interview process.

Day #1: The finalists are given a tour of the community by a knowledgeable staff member or resident. Communities often also include a reception with the City's senior staff at this point.

Later, that evening, the Commission can host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. As noted, your next City Manager will, after all, represent your local government in a variety of venues. It is thus important to know how the individual will respond to your citizenry. The reception also serves as an icebreaker whereby the Commission Members and the candidates get to know one another informally.

Day #2: The next morning, each candidate will interview individually with each Commission Member for approximately 40 minutes. These meetings provide you with an opportunity to assess how the candidates might interact with you on an individual basis. Ultimately, Managers succeed or fail based on their interaction with the Commission and its individual members. One-on-one interviews are an excellent way to test that interaction.

After lunch, the Commission, as a group, will interview each finalist one at a time for approximately 30 minutes. Part of the interviews might include a PowerPoint presentation, so the Commission can observe the candidates' presentational skills.

We recommend you invite the finalists' spouses to the interviews, so they can become familiar and feel comfortable with the community.

Finally, if you it would make you feel more comfortable, we can recommend several third-party management and personality assessment tools that the City can use to provide additional input. They are available at a relatively small cost and are not included in our fee.

II. Proposed Work Plan (Continued)

Task Nine: Debriefing and Selection

After the interviews are completed, we have developed a simple methodology that moves the elected body quickly and rationally to selecting your next Manager.

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

If requested, 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 with the selected candidate. 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 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. We simply feel it is part of our job to assure a successful relationship.

Communications: We will provide weekly reports about the status of the search, in writing or by phone, depending upon your preference. At significant milestones we will make the reports in person. We are also available at any time, day or night, to address any questions you have along the way. To do so, we will provide you with our cellphone numbers and you should feel comfortable contacting us whenever you have a question whether it is directly related to the search or, for that matter, anything else related to local government. We are, in addition to being exceptional recruiters, students of local government, and can often provide insights and names of parties who have dealt a wide variety of issues, often with innovative solutions. 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 (and spouses, if invited) for all expenses associated with their travel, meals, and incidentals for the interview process.

II. Proposed Work Plan (Continued)

Proposed Project Schedule

We understand the City wants to move quickly on this recruitment. We are uniquely positioned to do so based on our knowledge of and experience in Florida.

Phase I: Needs Assessment / Information Gathering

- May 3rd: CB&A begins meeting with the Commission Members and other stake holders to understand the job and its challenges.
- May 16th: CB&A submits the draft of the full recruitment profile to the City for its review.
- May 23rd: City provides comments on the recruitment profile.

Phase II: Recruiting

- May 26th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to almost 14,000 local government professionals.
- June 23rd: Closing date for submission of applications.
- June 28th: CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

- July 24th: CB&A forwards its reports and materials to the City for the recommended candidates. These will include the candidates' cover letters, resumes and introduction as well as the results of our reference, background and Internet/newspaper archives/social media checks.
- August 1st: City selects approximately five finalists and an alternate to interview.

Phase IV: Interview Process Coordination and City Manager Selection

- August 10th: City holds reception for the finalists.
- August 11th: One-on-one and full Commission interviews and decision.

Phase V: Negotiation, Warranty & Continuing Assistance

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

III. Proposed Project Team

Project Team and Involvement

Colin Baenziger & Associates has assembled an outstanding project team to serve your needs.

Colin Baenziger will have overall responsibility for the execution of the search. Mr. Baenziger has spent ten years local government as a senior manager and over 30 years as a consultant. In addition to his 25 years in executive search, he specialized in operational reviews of governmental agencies and private sector clients such as the Recording Industry Association of America, and 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.



Lynelle Klein, Vice President for Operations, is a skilled professional with extensive expertise in executive search. Starting as a research assistant with CB&A 12 years ago, she has now firmly established herself as the number two person at CB&A. Prior to joining the firm, she worked primarily in the private sector providing financial and administrative services. Ms. Klein has an associate degree from Brigham Young University in Rexburg, Idaho. She currently resides in Mesa County, CO.



Stephen Sorrell, Senior Vice President, brings over 35 years of management and technical experience in municipal, county, state, and special district agencies in addition to his work with Colin Baenziger & Associates (CB&A). Some of the leadership positions Steve has held include serving as Executive Director, Emerald Coast Utilities Authority in Pensacola, Florida, and as City Manager, Director of Public Safety, Assistant City Manager, and Director of Finance, all for Hamilton, Ohio. He is a P.E. and earned a Bachelor of Science in Civil Engineering Degree from the University of Dayton, Ohio, and Master of Public Administration Degree from the University of Cincinnati, Ohio. He is a member of the International City/County Management Association, Florida City/County Management Association, Florida Finance Officers Association, American Water Wastewater Association, President of the Exchange Club, President of the Safety Council, Chairman of the Neighborhood Watch Program, and served on the Board of Directors for Senior Services and the Chamber of Commerce. One day, he hopes to slow down – just not yet.



III. Proposed Project Team *(continued)*

Ron Williams, Senior Vice President. While Mr. Williams is technically relatively new to CB&A, he worked with the firm in its infancy and helped develop the operating methodology that has led to our growth and success. His public sector career began as a budget analyst for the City of Miami and culminated as the City Manager for Palmetto Bay (an affluent suburb of Miami, FL with 24,000 residents) and then for Live Oak (a rural city of 7,000 about 100 miles west of Jacksonville, FL). Along the way, he served in high level positions in the juvenile justice, public works, and general services. What excites him now is finding the people you need to fill your key positions, and he is exceptionally good at it. Ron has a Bachelor of Science in Management and a Master's Degree in Public Administration from the University of West Florida. He has also taught at Miami Dade College and in the County's public school system.



Rick Conner, Senior Vice President, has over 30 years of experience in executive recruiting and in local government (serving as a city manager in Florida and Texas) as well as a public works and utilities director. That experience provides him with an excellent perspective of the needs of local government operations and staffing. Rick earned Bachelor of Science Degrees in Business Administration and Engineering from the University of Missouri. He is a Registered Land Surveyor and a Professional Engineer in Missouri, as well as a Professional Engineer in Florida, Tennessee and Texas. In his spare time, he invents scuba diving equipment and accessories.



IV. References

City Manager, Jacksonville Beach, FL (population 23,518)

Contact: Former Mayor Charles Latham at (904) 910-4004, or
Current Mayor Christine Hoffman at (904) 476-6153, or
choffman@jaxbchfl.net

CB&A began work on July 16, 2018. We were asked to conduct the search expeditiously so that interviews could be conducted prior to the November election. We sought candidates from around the country, performed the candidate screening. Interviews were held on October 12th with *Mr. Michael Staffopoulos, formerly an Assistant City Manager with Largo, FL*, being selected later that day. Mr. Staffopoulos remains with the City.



County Manager, Clay County, FL (population 191,400)

Contact: Current Commission Chair Mike Cella at (904) 234-4630
(mike.cella@claycountygov.com) or
Former Commissioner Diane Hutchings, at (904) 710-1469

Clay County is located just southwest of Jacksonville on the St. Johns River. We have found the County's last three managers, Fritz Behring in 2005 (who left in 2010 to become the County Manager of Pinal County, AZ), Stephanie Kopelousos in 2010 (who left to the Florida Governor's Director of Legislative Affairs in March 2019), and Howard Wanamaker in 2019. The more recent search began work on December 20, 2018, and included recruiting and advertising for candidates, conducting background checks, selecting the most qualified, recommending them for interviews, coordinating the interview process, and assisting in contract negotiations. Interviews took place on March 22, 2019, and the County hired *Howard Wanamaker, then the Chief Strategy Office & Director of Human Resources with Hanania Automotive*. He remains with the County.



City Manager, Orange City, FL (population 11,569)

Contact: Mayor Gary Blair at (386) 775-5403 or
gblair@ourorangecity.com

CB&A began work in September 2015 to assist the city in finding its next **Manager**. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, recommending finalists for the city to interview and helping with the contract negotiations. *Dale Arrington, former Assistant City Manager for DeLand, Florida*, was selected on January 9, 2016. The announcement of the selection led to applause from the audience waiting in council chambers. She remains with the City.



IV. References (continued)

City Manager, Seminole, FL (17,800)

Contact: Mayor Leslie Waters at ((727) 430-7553, or
lwaters2@myseminole.com

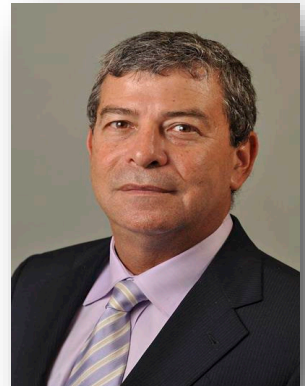
Colin Baenziger & Associates was asked to conduct Seminole's **City Manager Search** in early April 2015. Our work included recruiting and advertising for candidates, conducting background checks, selecting the most qualified, recommending them for interviews, coordinating the interview process, and assisting in the contract negotiations. Interviews took place on June 25th and 26th. On June 30th, *Ann Toney-Deal, a past City Manager of Haines City, FL*, was selected. Ms. Toney-Deal remains with the City and in 2020 the Council was so pleased with her performance that they gave her an 8% salary increase.



City Manager, St. Pete Beach, FL (population 9,700)

Contact: Mayor Al Johnson at (727) 543-2794
or ajohnson@stpetebeach.org

We began our work in November of 2018 to find the next City Manager for St. Pete Beach. Located on a barrier island in the Gulf of Mexico just west of Tampa/St. Petersburg in Pinellas County, St. Pete Beach is a special place. Our work included searching the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the county to interview. In February 2019 the Board selected *Alex Rey, formerly the Town Manager for Miami Lakes, FL*. Mr. Rey remains with the City and in 2021 he received unbridled praise along with a contract extension that included a 5% salary increase and a \$500 a month housing stipend.



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

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

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



IV. References (continued)

Candidate References

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

Placement	Formerly	Recruited To Be	Contact at
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June 2014, she left in March 2020 to become the Deputy City Manager for Greenville, SC, and then returned to Sandy Springs as the City Manager in January 2022	(404) 683-4816
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014 Hired as the Fairfax County, VA, CEO in January 2018	(843) 368-7458
Chris Morrill	Assistant City Manager, Savannah, GA	City Manager, Roanoke, VA Appointed December 2009 Hired as the Executive Director of the Government Finance Officers Association in February 2017	(843) 368-7458

V. Fee and Warranty

Fee

CB&A offers a firm, fixed price of \$32,500, which includes all the expenses we will incur in the search with one exception. The City will make a reservation and pay for one night's stay in the same hotel as the finalists when they come to interview for the City Manager position so we can help facilitate the final stage of the recruitment process. The only other expenses the City will incur are those associated with bringing the finalists (and spouses, if invited) to interview with the City (travel, meals, hotel etc.). Bills will be rendered as the search progresses and due at the end of each Phase as indicated below:

Requested Services	
Phase I: Needs Analysis / Information Gathering	\$ 4,000
Phase II: Recruiting	14,000
Phase III: Screening	12,000
Phase IV: Interview Process Coordination and Selection	1,500
Phase V: Negotiation and Warranty	1,000
Firm, Fixed Fee Total*	\$32,500

If the City asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of \$150 per hour. No such work will be performed without your written authorization. Please note, as previously stated, that we have never billed nor requested additional funds beyond our originally quoted fee – even when circumstances suggested we were entitled to them and where the work we performed extended beyond the scope of our assignment.

Warranty

Colin Baenziger & Associates offers one of the best warranties in the industry. We can offer it because we have confidence in our work. Provided we conduct the full search (Phases I-V), follows our recommendations, and selects from among the candidates we recommend, we warrant the following:

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

VI. Required Forms

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "A"
CONTACT SHEET

Name: Colin Baenziger and Associates

Federal Taxpayer ID: 20-8185763

Mailing Address: 2055 South Atlantic Avenue, Suite 504

City, State, & Zip Code: Daytona Beach Shores, FL 32118

Telephone: (561) 707-3537 **Fax:** (561) 621-5965

Email: Colin@cb-asso.com

Submitted By: Lynelle Klein

Title: Senior VP for Operations

Accounting Contact:

Name: Colin Baenziger **Title:** Principal

Email Address: Colin@cb-asso.com **Phone:** (561) 707-3537

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "B"

SWORN STATEMENT UNDER F.S. SECTION 287.133(3) (A), ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract for
RFP _____, 23 _____ 07 _____

2. This sworn statement is submitted by (entity) Collin Baenziger and Associates whose business address is 2055 S. Atlanta Avenue, Suite 504, Daytona Beach Shores, FL 32118 and (if applicable) Federal Employer Identification Number (FEIN) is 20-8185763 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: 4451.)

3. My name is Lynelle Klein and my relationship to the entity named above is
Employee.

4. I understand that a "public entity crime" as defined in Paragraph 287.133(a) (g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a) (b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.

6. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime; or
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Fernandina Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length

VI. Required Forms (continued)

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

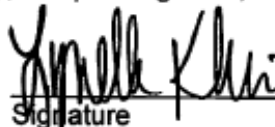
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

 X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

 The person or affiliate was placed on the convicted FIRM list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted FIRM list. (Please attach a copy of the final order.)

 The person or affiliate has not been placed on the convicted FIRM list. (Please describe any action taken by, or pending with, the Department of General Services.)


Signature

March 24, 2023

Date:

VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF COLORADO

COUNTY OF MESA

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24 day of March, 2023 and is personally known to me, or has provided Colorado Drivers License as identification.

J. Martinez

Notary Public

My Commission expires: 01/28/2026



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "C"
DRUG-FREE WORKPLACE CERTIFICATION

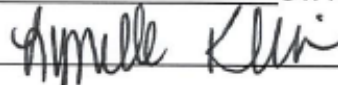
The below-signed INDIVIDUAL/FIRM certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

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

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: Colin Baenziger and Associates

CITY: Daytona Beach Shores STATE: FL ZIP CODE: 32118

SIGNATURE:  PHONE: 970-433-7189

NAME (TYPED OR PRINTED): Lynelle Klein TITLE: Senior VP

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: RFP 23-07

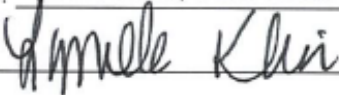
Project Description: City Manager Executive Search

I/FIRM acknowledges and agrees to the following:

I/FIRM shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the FIRM during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the FIRM to perform work pursuant to the contract with the Department.

Individual/Company/Firm: Lynelle Klein, Colin Baenziger & Associates

Authorized Signature: 

Title: Senior VP for Operations

Date: March 24, 2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or firm presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document.

1. INTRODUCTION AND GENERAL INFORMATION
Understands and agrees to all terms.
2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
Understands and agrees to all terms.
3. EVALUATION AND CONTRACT OVERVIEW
Understands and agrees to all terms.
4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
Understands and agrees to all terms.
5. PROPOSER'S RESPONSE: PROPOSED TEAM
Understands and agrees to all terms.
6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
Understands and agrees to all terms.

Name: Lynelle Klein Title: Senior VP for Operations

Signature:  Date: March 24, 2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Colin Baenziger and Associates whose business address is 2055 S. Atlanta Avenue, Suite 504, Daytona Beach Shores, FL 32119 (if applicable) Federal Employer Identification Number (FEIN) is 20-8185763 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: 4451.)

My name is Lynelle Klein and my relationship to the entity named above is Employee.

1. The above-named entity is submitting a Proposal for the City of Fernandina Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Fernandina Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Fernandina Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Fernandina Beach.


Signature

March 24, 2023

Date:

VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF COLORADO

COUNTY OF MESA

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24 day of March, 2023, and is personally known to me, or has provided Colorado Drivers License as identification.

01/28/2026 My Commission expires:
J Martinez Notary Signature



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

VI. Required Forms (continued)

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Colin Baenziger and Associates whose business address is 2055 S. Atlanta Avenue, Suite 504, Daytona Beach Shores, FL 32119 (if applicable) Federal Employer Identification Number (FEIN) is 20-8185763 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: 4451.)

My name is Lynelle Klein and my relationship to the entity named above is Employee.

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Fernandina Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Lynelle Klein
Signature

March 24, 2023

Date:

STATE OF COLORADO
COUNTY OF MESA

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24 day of March, 2023 and is personally known to me, or has provided Colorado Drivers License as identification.

J. Martinez
Notary Signature

My Commission expires: 01/28/2026

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



VI. Required Forms (continued)

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "H"

DISPUTES DISCLOSURE FORM

Answer the following questions by placing an "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES ___ NO ✓

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES ___ NO ✓

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES ___ NO ✓

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Fernandina Beach.

Colin Baenziger and Associates

March 24, 2023

Firm

Date

Lynelle Klein
Authorized Signature

Lynelle Klein, Senior VP for Operations

Printed or Typed Name and Title

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING



PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES FOR FERNANDINA BEACH, FL

Volume II: Appendices

RFP 23-07

Colin Baenziger & Associates

Contact Person:

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

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

PROPOSAL TO BE THE CITY'S EXECUTIVE RECRUITING FIRM

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Appendix A

*Searches by
Colin Baenziger & Associate' Staff*

Governmental Search Assignments

Current Searches

City Manager, Belle Isle, FL (population 7,344)
City Manager, Cooper City, FL (population 33,867)
City Manager, Fircrest, WA (population 7,174)
City Manager, Fort Walton Beach FL (population 20,879)
County Administrator, Manatee County, FL (population 422,774)
Town Manager, Oakland, FL (population 5,400)
Town Manager/Finance Director, Ocean Ridge, FL (population 1,830)

Landscaping Director, Estero, FL (population 33,450)
City Attorney, Sebastian, FL (population 25,703)

General Manager, Sun 'n Lake Improvement District, FL (population served 9,000+)

Completed Searches in 2023

County Administrator, Indian River County, FL (population 163,662)
Town Manager, Juno Beach, FL (population 3,770)
County Administrator, St. Lucie County, FL (population 343,579)

Deputy Water & Sewer Director, Miami-Dade County, FL (population 2.706 million)
Assistant to the City Manager, North Myrtle Beach, SC (18,790)

General Manager, Beaufort-Jasper Water & Sewer Authority, SC (population served 150,000)

Governmental Search Assignments (continued)

Completed Searches Prior to 2023

City/Town/Village Manager/Administrator

City Manager, Albany, GA (population 75,600) in 2011
City Manager, Ankeny, IA (population 45,600) in 2013
City Manager, Ashland, KY (population 21,000) in 2013
City Manager, Auburn, AL (population 58,582) in 2017
City Manager, Aventura, FL (population 37,724) in 2017 and 2018
Village Manager, Bal Harbour, FL (population 3,300) in 2013
City Manager, Bartow, FL (population 16,000) in 2007 in 2017 and 2022
Town Manager, Bay Harbor Islands, FL (population 5,628) in 2007, 2012 and 2020
City Manager, Bellevue, WA (population 122,400) in 2014
City Administrator, Bradenton, FL (population 60,888) in 2021
City Manager, Brighton, CO (population 41,254) in 2020
Town Manager, Buckeye, AZ (population 32,000) in 2006
City Manager, Burien, WA (population 55,188) in 2017
City Manager, Cape Canaveral, FL (population 10,200) in 2010
City Manager, Cape Coral, FL (population 194,570) in 2012 and 2020
City Manager, Carnation, WA (population 1,873) in 2017
City Manager, Casselberry, FL (population 25,000), in 2005
City Manager, Chamblee, GA (population 17,000) in 2011
City Manager, Clewiston, FL (population 7,270) in 2019
City Manager, Cocoa Beach, FL (population 11,200) in 2012, 2015 and 2016
City Administrator, Connell, WA (population 4,200) in 2014
City Manager, Cooper City, FL (population 32,000) in 2008
City Manager, Coral Gables, FL (population 43,000) in 2009
City Manager, Cottonwood Heights, UT (population 34,000) in 2004
City Manager, Covington, VA (population 5,802) in 2016
City Manager, Crescent City, FL (population 1,542) in 2020
Town Manager, Cutler Bay, FL (population 35,000) in 2006
City Manager, Dania Beach, FL (population 28,000) in 2009
City Manager, Danville, VA (population 43,000) in 2016
City Manager, Deerfield Beach, FL (population 78,000) in 2019
City Manager, Delray Beach, FL (population 64,100) in 2014
City Manager, Deltona, FL (population 83,000) in 2006 and 2008
City Manager, Destin, FL (population 12,000) in 2003 and 2011
City Administrator, Dickinson, ND (population 22,300) in 2018
City Manager, Doral, FL (population 24,000), in 2004
City Manager, Doraville, GA (population 10,896) in 2013, 2017 and 2020
Town Manager, Dundee, FL (population 3,000) in 2006 and 2009
City Manager, Ellensburg, WA (population 18,350) in 2014
City Manager, Elmira, NY (population 29,200) in 2014
Village Manager, Estero, FL (population 26,600) in 2015
City Manager, Fairborn, OH (population 33,200) in 2017

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, Fayetteville, NC (population 208,000) in 2012
City Manager, Fernandina Beach, FL (population 11,000) in 2006 and 2015
City Manager, Fife, WA (population 8,700) in 2010
City Manager, Fort Myers, FL (population 68,190) in 2016
Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008
City Manager, Fort Pierce, FL (population 41,900) in 2012
City Manager, Fort Smith, AR (population 87,650) in 2016
City Manager, Fruitland Park, FL (population 4,100) in 2013
City Manager, Gainesville, FL (population 133,857) in 2016 and 2019
City Manager, Greensboro, NC (population 259,000) in 2009
City Manager, Groveland, FL (population 12,493) in 2018
City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012
City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)
City Manager, Homestead, FL (population 62,000) in 2010
City Manager, Indianola, IA (population 15,108) in 2015
Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999, 2005, 2021 and 2022
City Manager, Jacksonville Beach, FL (population 23,387) in 2018
Town Manager, Juno Beach, FL (population 3,600) in 2005
Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011
City Manager, Key West, FL (population 24,600) in 2012
Town Manager, Lady Lake, FL (population 15,954) in 2021
City Administrator, Lake Forest Park, WA (population 13,059) in 2018
Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003
City Manager, Lake Worth Beach, FL (population 38,010) in 2003, 2007 and 2021
Town Manager, Lantana, FL (population 9,600) in 2000 and 2021
City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002
City Manager, Leesburg, FL (population 20,390) in 2013
City Manager, Madeira Beach, FL (population 12,300) in 2011
Town Manager, Mangonia Park, FL (population 1,400) in 2001
City Manager, Marathon, FL (population 11,500) in 2002 and 2004
City Manager, Marco Island, FL (population 15,000) in 2014
City Manager, Mascotte, FL (population 5,873) in 2021
City Manager, Medina, WA (population 3,000) in 2013
City Manager, Melbourne, FL (population 72,500) in 2012
City Manager, Miami Gardens, FL (population 101,000) in 2004
City Manager, Mill Creek, WA (18,828) in 2015 and 2022
City Manager, Miramar, FL (population 122,000) in 2013
City Manager, Monroe, NC (population 33,500) in 2013
City Manager, Montverde, FL (population 1,675) in 2020
Town Manager, Mooresville, NC (population 41,995) in 2019
City Manager, Mount Dora, FL (population 12,000) in 2005
City Manager, Mount Pleasant, MI (population 26,000) in 2014

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, Mountlake Terrace, WA (population 20,700) in 2014 and 2016
City Manager, Naples, FL (population 21,800) in 2018
City Manager, New Smyrna Beach, FL (population 23,000) in 2009
City Manager, Normandy Park, WA (population 6,335) in 2013 and 2015
City Manager, North Miami, FL (population 62,000) in 2010 and 2014
Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012
City Manager, North Port, FL (population 55,800) in 2011
Town Manager, North Topsail Beach, NC (population 734) in 2018
City Manager, Norwich, CT (population 40,500) in 2016
City Manager, Oakland Park, FL (population 42,800) in 2014
City Manager, Ocala, FL (population 52,000) in 2008 and 2015
City Manager, Opa-Locka, FL (population 2,180) in 2019
City Manager, Orange City, FL (population 10,000) in 2010 and 2016
City Manager, Orange Park, FL (population 9,100) in 2010
City Manager, Oviedo, FL (population 33,000) in 2008
City Manager, Palm Bay, FL (current population 101,000) in 2002 and 2015
City Manager, Palm Coast, FL (population 71,000) in 2006
Village Manager, Palmetto Bay, FL (population 24,000) in 2003
City Manager, Panama City Beach, FL (population 12,776) in 2012 and 2019
City Manager, Parkland, FL (population 30,177) in 2017
City Manager, Petersburg, VA (population 32,701) in 2017
Village Manager, Pinecrest, FL (population 19,300) in 2011
City Manager, Pompano Beach, FL (population 101,000) in 2007
City Manager, Port Orange, FL (population 67,494) in 2021
City Manager, Port Richey, FL (2,869) in 2020
City Manager, Port St. Lucie, FL (population 174,100) in 2016
City Manager, Portland, ME (population 65,000) in 2011
City Manager, Prosser, WA (population 5,802) in 2016
Chief Administrative Officer, Renton, WA (population 100,953) in 2021
City Manager, Riviera Beach, FL (population 37,000) in 2009
City Manager, Roanoke, VA (population 98,465) in 2009 and 2017
City Manager, Sammamish, WA (population 64,548) in 2019
City Manager, Sanibel Island, FL (population 7,319) in 2021
City Manager, Sarasota, FL (population 55,000) in 2012
City Manager, Satellite Beach, FL (population 10,100) in 2013
City Manager, Savannah, GA (population 142,800) in 2016
City Manager, Scottsdale, AZ (population 217,400) in 2013
City Manager, Sebastian, FL (population 24,772) in 2018
City Manager, Seminole, FL (population 17,800) in 2015
City Manager, Sequim, WA (population 6,700) in 2015 and 2021
Town Manager, Sewall's Point, FL (population 2,000) in 2006
Township Manager, Spring Garden Township, PA (population 12,963) in 2018
Township Manager, Springettsbury Township, PA (population 26,700) in 2014 and 2016

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, St. Pete Beach, FL (population 10,000) in 2014 and 2019
City Manager, Stuart, FL (population 17,000) in 2006 and 2017
City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011
City Manager, Sunrise, FL (population 84,400) in 2012
City Manager, Sunnyside, WA (population 15,860) in 2013 and 2018
Town Manager, Surfside, FL (population 6,000) in 2014
City Manager, Tacoma, WA (population 200,000) in 2011 and 2017
City Administrator, Tavares, FL (population 11,000) in 2006
City Manager, Temple Terrace, FL (population 26,901) in 2022
City Manager, Titusville, FL (population 43,940) in 2014
City Manager, Treasure Island, FL (population 6,937) in 2017
City Manager, Vero Beach, FL (population 16,751) in 2019
City Manager, West Melbourne, FL (population 15,000) in 2009
City Manager, West Park, FL (population 12,000) in 2005 and 2010
City Manager, Weston, FL (population 70,015) in 2019
City Manager, Winchester, VA (population 28,108) in 2014 and 2020
City Manager, Winter Haven, FL (population 37,900) in 2017
City Manager, Yakima, WA (population 91,000) in 2011 and 2012

County Administrator / Manager - Completed Searches

County Manager, Alachua County, FL (population 251,400) in 2014
County Manager, Baker County, FL (population 27,000) in 2006
County Administrator, Bay County, FL (population 158,000) in 2005
County Manager, Brevard County, FL (population 536,000) in 2009
County Administrator, Broward County, FL (population 1,800,000) in 2006
County Administrator, Clackamas County, OR (population 383,900) in 2013
County Manager, Clay County, FL (population 212,230) in 2005, 2011 and 2019
Chief Administrator, El Paso County, TX (population 827,700) in 2014 and 2016
County Administrator, Emmet County, MI (population 32,900) in 2014
County Manager, Flagler County, FL (population 83,000) in 2007
County Manager, Fulton County, GA, (partial search) in 2015 (population 894,300) in 2015
County Administrator, Hernando County, FL (population 172,800) in 2012
County Administrator, Highlands County, FL (population 98,000) in 2008
County Administrator, James City County, VA (population 69,000) in 2014
County Manager, Lee County, FL (population 600,000) in 2009
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

Governmental Search Assignments (continued)

County Administrator / Manager - Completed Searches (continued)

County Manager, Osceola County, FL (population 235,000) in 2003 and 2007
County Administrator, Polk County, IA (population 400,000) in 2007 and 2011
County Manager, Seminole County, FL (population 410,000) in 2006
County Administrator, St. Johns County, FL (population 162,000) in 2007
County Administrator, St. Lucie County, FL (population 284,000) in 2014
County Manager, Union County, NC (population 198,600) in 2010
County Administrator, York County, VA (population 66,269) in 2015

Completed Searches – Other Municipal CEO

Executive Director, Bartow Municipal Airport Development Authority, Bartow, FL in 2017
Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016
General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011 and 2022
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
Executive Director, South Correctional Entity (SCORE), Des Moines, WA (population served 406,000) in 2018

Community Association CEOs and Assistant CEOs

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016
Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011 (The Executive Director also managed five community associations.)
Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV (population 14,000) in 2015 and 2017
Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001

Completed Searches – Assistant/Deputy Managers

Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013
Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014
Deputy City Manager, Danville, VA (43,000) in 2016

Governmental Search Assignments (continued)

Completed Searches – Assistant/Deputy Managers (continued)

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

Completed Searches – City or County Attorneys

County Attorney, Clay County, FL (population 196,400) in 2016
City Attorney, Daytona Beach, FL (62,300) in 2016
City Attorney, Fort Lauderdale, FL (population 178,752) in 2018
City Attorney, Fort Pierce, FL (population 41,590) in 2016 and 2018
County Attorney, Fulton County, GA (population 996,319) in 2015
City Attorney, Lawton, OK (population 94,653) in 2020
City Attorney firm, Naples, FL (population 22,367) in 2021
City Attorney, Ocala, FL (population 60,021) in 2022
Chief Labor Negotiator, Orlando, FL (population 270,934) in 2018
City Attorney, Port St. Lucie, FL (population 185,132) in 2016 and 2019
County Attorney, Prince William County, VA (population 438,580) in 2015
City Attorney, Roanoke, VA (population 96,000) in 2012
Fire District Attorney, St. Lucie County Fire District, FL (population 298,600) in 2017
City Attorney, Vero Beach, FL (population 16,751) in 2019
City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Planning and Community Development Director, Bradenton, FL (population 60,888) in 2021
Growth Management Director, Collier County, FL (population 357,305) in 2015 and 2017
Community Development Director, Danville, VA (population 43,000) in 2016
Planning and Development Director, Fairfax County, VA (population 1,150,309) in 2022
Director, Building and Development, Loudoun County, VA (population 336,900) in 2014
Community Development Director, Miami, FL (population 408,000) in 2008
Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012
General Manager, North Sarasota Redevelopment District, Sarasota, FL (population 53,000) in 2008
Growth Management Director, St. Lucie County, FL (population 261,000) in 2005
Community Development Director, Tamarac, FL (population 55,500) in 2007

Governmental Search Assignments (continued)

Completed Searches – Economic Development / Redevelopment

Growth Management Manager, Wellington, FL (population 55,000) in 2009
Executive Director, Camden County (GA) Joint Development Authority (pop. 51,400) in 2014
Economic Development Director, Collier County, FL (population 328,000) in 2012
Economic Development Director, Concord, NH (population 42,444) in 2017
Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009
Economic Development Director, Roanoke, VA (population 96,000) in 2012
Director, Office of Economic & Workforce Development, Durham, NC (pop. 220,000), 2009
Economic Development Director, Loudoun County, VA (population 326,000) in 2010
Economic Development Director, St. Johns County, FL (population 162,000) in 2011

Completed Searches – Engineers

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

Completed Searches – Facilities Management

Director, Performing Arts & Convention Center, Federal Way, WA (population 92,700) in 2015
Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Finance and Budget

Finance Director, Altus, OK (population 19,800) (background check) in 2012
Finance Director, College Park, MD (population 32,256) in 2016
Procurement Director, Collier County, FL (population 357,305) in 2016
Finance Director, Danville, VA (population 43,000) in 2014
Finance Director, Daytona Beach, FL (population 31,860) in 2012
Finance Director, DeLand, FL (population 28,230) in 2016
Finance Director, Escambia County (FL) Housing Authority (population served: 302,700), 2014
Chief Financial Officer, Estero, FL (population 36,939) in 2022
Finance Director, Fort Walton Beach, FL (population 20,000) in 2006
Finance Director, Gainesville, FL (population 133,857) in 2020
Finance Director, Groveland, FL (population 12,493) in 2018
Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012
Manager, Office of Management & Budget, Lake Worth Beach, FL (population 37,000) in 2010
Finance Director, Lauderdale Lakes, FL (population 32,000) in 1998

Governmental Search Assignments (continued)

Completed Searches – Finance and Budget (continued)

Finance Director, Miami, FL (population 408,000) in 2013
Finance Director, Miramar, FL (population 130,300) in 2016
Treasurer, Miami, FL (population (408,000) in 2013
Finance Director, Oregon City, OR (population 31,860) in 2012
Finance Director, Petersburg, VA (population 32,701) in 2017
Finance Director, Roanoke, VA (population 99,000) in 2014
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
Revenue Operations Director, Savannah, GA (population 142,800) in 2017
Budget Director, St. Petersburg, FL (population 248,000) in 2009
Finance Director, St. Petersburg, FL (population 248,000) in 2010
Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010
Finance Director, Surfside, FL (population 5,700) in 2012
Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009
Finance Director, West Palm Beach, FL (population 101,000) in 2007
Chief Financial Officer, Winter Springs, FL (population 36,342) in 2022

Completed Searches – Fire/EMS/Dispatch

Fire Chief, Cape Coral, FL (population 154,300) in 2013
Fire Chief, Lauderdale Lakes, FL (population 32,000) in 1999
Executive Director, South Sound 911 (serves a population of 808,000), Tacoma, WA, in 2013
Fire Chief, St. Lucie County Fire District, FL (population 298,600) in 2018
Fire Chief, West Palm Beach, FL (population 101,000) in 2005

Completed Searches – General Services / Administration

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

Completed Searches – Housing/Building

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

Completed Searches – Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006
Human Resources Director, Cape Coral, FL (population 154,300) in 2013

Governmental Search Assignments (continued)

Completed Searches – Human Resources (continued)

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

Completed Searches – Health and Human Services

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

Completed Searches – Information Technology

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

Completed Searches – Parks/Recreation/Libraries

Parks and Recreation Director, Cape Coral, FL (population 179,804) in 2018
Parks and Recreation Director, Deerfield Beach, FL (population 78,041) in 2017 and 2019
Director, Parks, Recreation, & Conservation, Hillsborough County, FL (pop. 1,292,000) in 2015
Director, Parks and Recreation, Hobbs, NM (population 35,000) in 2014
District Manager, Holiday Park Recreation District, Palm Bay, FL (population 1,400) in 2007
Libraries and Information Services Director, Newport News, VA (population 183,000) in 2017
Library Services Director, St. Johns County, FL (population 162,000) in 2007
Parks and Recreation Director, West Palm Beach, FL (population 101,000) in 2006
Parks and Recreation Director, Weston, FL (population 70,015) in 2019

Completed Searches – Police

Police Chief, Farmington, NM (population 45,900) in 2014
Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)

Governmental Search Assignments (continued)

Completed Searches – Police (continued)

Police Chief, Indian Creek Village, FL (population 89) in 2022
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
Chief of Police, Mooresville, NC (population 35,300) in 2016
Police Chief, Petersburg, VA (population 32,701) in 2017
Director of Administration – Public Safety, Ocean Reef Community Association, Key Largo, FL in 2016
Police Chief, Sewall’s Point, FL (population 2,000) in 2007
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012
Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010
Police Chief, Winchester, VA (population 27,216) in 2017

Completed Searches – Public Works

Public Works Director, Aventura, FL (population 37,200) in 2016
Public Works Director, Camden County, GA (population 53,044) in 2019
Solid Waste Director, Camden County, GA (population 53,044) in 2018
Public Works Director, Chandler, AZ (population 250,000) in 2007
General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Public Works Administrator, Renton, WA (population 100,953) in 2020
Public Works Director, Sammamish, WA (60,000) in 2016
Director/Capital Projects Manager/City Engineer, Sunny Isles Beach, FL (pop. 17,000) in 2007
Assistant Public Works Director, Sumter County, FL (107,000) in 2015
Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008
Public Works Director, Tamarac, FL (population 55,500) in 2003
Solid Waste Director, Tampa, FL (population 335,700) in 2014
Director, Landscaping, Weston, FL (population 65,300) in 2013

Completed Searches – Transportation

Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016 and 2022

Governmental Search Assignments (continued)

Completed Searches – Utilities

Water Resources Director, Asheville, NC (population 87,200) in 2015
Executive Director, Cape Fear Utility Authority, Wilmington, NC (population served 230,000) in 2021
Utility Director, Danville, VA (population 43,000) in 2015
Power & Light Division Director, Danville, VA (population 43,000) in 2015
Water and Gas Director, Danville, VA (population 43,000) in 2016
Utilities Manager, Deerfield Beach, FL (population 78,041) in 2017
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012 and 2020
Executive Director, Emerald Coast Utilities Authority, Pensacola, FL (population served 300,000) in 2020
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003
General Manager, Island Water Association, Sanibel, FL in 2018
Utilities Director, Lake Worth, FL (population 37,000) in 2009
Waterworks Director, Newport News, VA (population 183,000) in 2017
Executive Director, Onslow Water & Sewer Authority, Jacksonville, NC, (pop. 160,000) in 2009
Utilities Director, Palm Bay, FL (population 101,000) in 2005
Utilities Director, Panama City, FL (population 38,286) in 2017
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Executive Director, Sewerage and Water Board of New Orleans, LA (population 369,000) in 2013
Customer Service Chief (a C Suite level position), Sewerage and Water Board of New Orleans, LA (population 369,000) in 2020
Director, South Martin Regional Utilities, FL (population 22,000) in 2013
Executive Director, Spartanburg Water, SC (population served 327,997) in 2022
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
General Manager, Tampa Bay Water, FL (population served 2,400,000) in 2008 and 2021
Chief Operating Officer, Tampa Bay Water, FL (population served 2,400,000) in 2022

Completed Searches – Work Force Management

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

Completed Searches – Other

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016
City Clerk, Lauderdale Lakes, FL (population 32,000) in 1998
Clerk to the County Commission, Fulton County, GA (population 1.02 million) in 2018

Governmental Search Assignments (continued)

Completed Searches – Other (continued)

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, Sun City Summerlin Homeowners Association, Las Vegas, NV

(population 14,000) in 2015 and 2017

Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998

Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL
in 2017

Appendix B

*Sample Brochure:
City Manager Search
Jacksonville Beach, FL*



CITY MANAGER POSITION AVAILABLE
Apply by August 24, 2018

Welcome to Jacksonville Beach

If you are looking for an outstanding city manager opportunity with an extremely well run local government in an unbeatable location, read on.

Jacksonville Beach is a place where the elected officials, staff, and the public take their government seriously and are proud of what they have achieved. The city has a corporate style culture and expects everything they do to be done right and to be first rate. Their police department is accredited and the city's electric utility is one of the best in the country and is loved by its customers. To top it off, the city is located on a barrier island community fronting the Atlantic Ocean a little east of Jacksonville. It offers glittering, white sand beaches, music, arts, nature, and a wonderful quality of life while retaining a family-friendly, laidback atmosphere. It is a wonderful place already, but it is also brimming with potential!



Living in Jacksonville Beach has much to offer. The people are warm, friendly, and helpful. They welcome newcomers and you will feel right at home. The city has been recognized by several organizations including being ranked #2 best on WalletHub's "2016's Best & Worst Florida Cities for Finding a Job," on NerdWallet's 2015 "Best Places to Start a Business in Florida," and ranked the 7th Best City in Florida by Mike Anderson in Cost of Living 2013.

Crime is generally quite low here (particularly given its proximity to a major metropolitan area), the schools are excellent, and medical care is outstanding. The Mayo Clinic/Jacksonville is literally 15 minutes away and it is only one of several excellent facilities in the area. Housing opportunities are varied ranging from the reasonable to the pricey (the median price of homes is in the mid-\$400,000).

The opportunities for leisure are unmatched. The city has wonderful beaches that routinely grace top 10 lists for its beauty and activities along with a renowned fishing pier. Over seventy events are held here annually including blues, jazz, rock'n roll and pops concerts by the sea, beach runs, a national night out, art fairs, and much more. For those who enjoy the outdoors, you will find a boatload of activities: swimming, beach volleyball, surfing (some of the best waves in the region are found here), kayaking, windsurfing, fishing and boating.



Visitors and natives alike are delighted by dolphins frolicking just off the beach. Enjoy the Beaches Museum & History Park, Adventure Landing, and sports leagues including baseball, softball and football, or the city's newly redesigned golf course. Shopping is plentiful and it is easy to find whatever you want—if not here, in nearby Jacksonville. The nature-lover will find the area to be a paradise. Cradle Creek Preserve, the newest of Jacksonville Beach's parks, is 43.3-acres of primarily undisturbed land along the Intracoastal Waterway. To the south lies Guana River Management Area while to the north are the Timucuan Ecological and Historical Preserve as well as Kathryn Abbey Hanna Park and the Huguenot Memorial Park.

Historic St. Augustine and Fernandina Beach (on Amelia Island) are less than one hour away while Jacksonville is right next door. The latter hosts the Museum of Contemporary Art, the Museum of Science (with its Bryan Gooding Planetarium) the Jacksonville Zoo and Gardens, the Jacksonville's Time-Union Center for theater, symphony, and touring Broadway shows. The city is also home to the NFL's Jacksonville Jaguars and the headquarters for the PGA tour is located in nearby Ponte Vedra Beach

Travel is convenient in Jacksonville Beach due to its location as a nexus between major highways and ports. Jacksonville International Airport is 30 minutes away and those who love to cruise can sail out of the Port of Jacksonville or travel a few hours south to Port Canaveral, the second busiest cruise port in the world.

With beautiful sunny days and gorgeous ocean views, Jacksonville Beach is a tropical paradise, where you can

work, live, play, and enjoy the beauty that Florida has to offer. The city's steady growth and strong community await a City Manager to continue the trip to its destiny of becoming a world class city.

HISTORY

Modern history begins with French Huguenots and the Spanish laying claim to the area, what would come to be known as Jacksonville Beach. Its origins as a community truly began when river pilots and fishermen built a port on the nearby river in 1831. Over time, the population grew, and by 1885, the town had 600 inhabitants, a post office, a school, and a lighthouse. Steamships visited daily, bearing beach-goers from Jacksonville.

A group of businessmen in Jacksonville devised a railway that would lead to the beaches east of Jacksonville, where they intended to develop a summer resort to attract tourists. The Jacksonville and Atlantic Railway Company was chartered in 1883 to build 16.5 miles of railway, and the company acquired many acres of oceanfront property. These were sold in lots, drawing in many prospective buyers and totaling sales of \$7,514.

The area became known as Pablo Beach in 1886, named after the San Pablo River that divides the island from the mainland. The railway was completed in 1886, as well, and the first resort hotel was opened, The Murray Hall Hotel with 192 rooms and boasting its location on "The Finest Beach in the World!"

The railway continued to expand, leading to Pablo Beach's incorporation on May 22nd, 1907. The name was changed

to Jacksonville Beach in 1925. In that interim, the area’s reputation grew as a boardwalk was constructed, along with dance pavilions, shooting galleries, restaurants, and other forms of entertainment.

For the remainder of the 20th century, Jacksonville Beach continued to grow. It did not, however, always thrive. In fact, by the latter half of the century, it was rather run down and unsafe. Over the last 30 years, that has all changed through a great deal of hard work, and assistance from the city government. The downtown has been revitalized and the city is once again a true destination.

DEMOGRAPHICS

See Table 1 (right) for information regarding Jacksonville Beach Demographics.

CLIMATE

Jacksonville Beach’s climate is described as humid subtropical with primary seasons: the hot, rainy season, which lasts from May to September, and the mild, dry season, which runs from October to April. During the summer months, the high temperatures are typically in the high 80s, rarely falling below the mid-70s, and the afternoons often bring short bursts of rain and thunder. During the cooler months, the average temperature is in the mid-60s, with the lows landing in the mid-40s. The average rainfall is 51 inches a year.

Jacksonville Beach is less susceptible to hurricanes than much of the East Coast. In fact, the area has only received one direct hit from a hurricane since 1871—Hurricane

Table 1: Jacksonville Beach Demographics

Estimated Population: 23,518			
Distribution by Race		Distribution by Age	
Caucasian	90.6%	0 to 15	13.2%
African American	3.7%	15 to 25	9.0%
Asian	2.3%	25 to 45	30.1%
Native American	0.1%	45 to 65	31.3%
Two or More Races	3.3%	65 to 85	14.0%
Total	100%	Over 85	2.4%
Hispanic (all races)	5.0%		

Educational Achievement (over age 25)	
High School or Higher	97.1%
Bachelor's Degree or Higher	48.6%

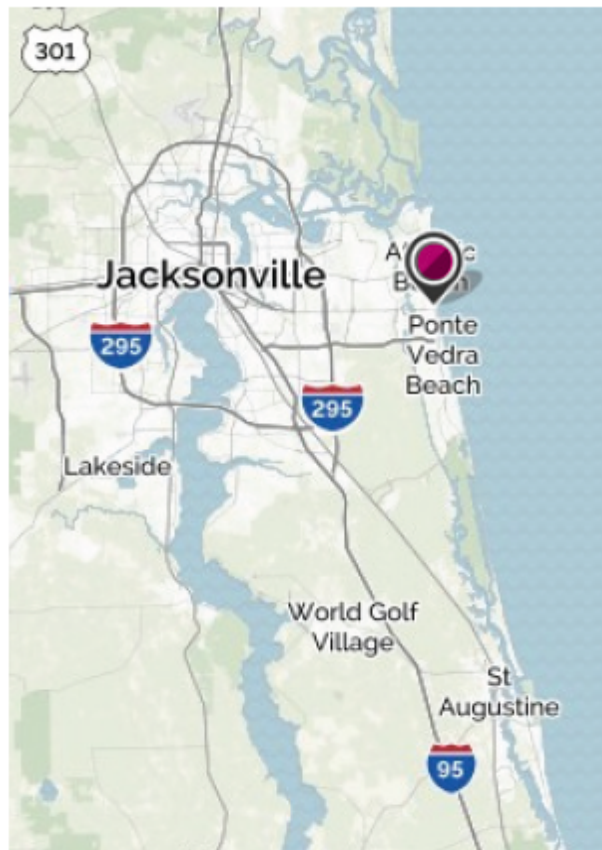
Other Statistics	
Median Age-Jacksonville Beach	43.2
Median Age-U.S.	37.4
Poverty Rate	8.2%

Source: U.S. Census Bureau

Dora in 1964. Recently, in 2016 and 2017, Hurricanes Matthew and Irma did not pass through the city but brought wind, rain, tree damage and some flooding

GEOGRAPHY

According to the United States Census Bureau, Jacksonville Beach covers a total area of 22.0 square miles, 7.3 square miles of which is land and 14.6 square miles of which is water. It is the eastern terminus of U.S. Route 90, which ends



at an intersection with State Road A1A three blocks from the Atlantic Ocean. It is due east of the city of Jacksonville and lies an average of 10 feet above sea level.

COMMERCE

See Table 2 (lower left) for information regarding Jacksonville Beach Principal Employers.

THE GOVERNMENT

Jacksonville Beach operates under a Council-Manager form of government. The seven-member City Council consists of the Mayor, three Council members elected at large, and three Council members elected by district. They serve staggered four-year terms and historically the Council has been relatively stable. The city does have, however, limits of two consecutive terms. The result is, along with retirements, three members will be leaving the Council this fall and the Mayor and remaining other

three will be termed out in 2020.

The Council is responsible for determining policy, passing ordinances, adopting the annual budget, appointing committees, and appointing the City Manager and City Attorney. The Council works well together generally and has a great deal of respect for city staff.

The City Manager is charged with carrying out the policies made by Council and managing

Table 2: Principal Employers, Jacksonville Beach and the Surrounding Environs

Employer	Industry	Employees
Naval Station Mayport	Military	9,000
Baptist Medical Center—Beaches	Healthcare	800
PGA Tour	Leisure	800
Ponte Vedra Inn and Club	Leisure	650
Sawgrass Marriot	Leisure	465
Optimum Healthcare IT	Healthcare	450
City of Jacksonville Beach	Government	400
TPC Sawgrass	Leisure	320
Vicar's Landing	Healthcare	320
U.S. Coast Guard	Military	300

Source: City of Jacksonville Beach, FL 2017 CAFR

the day-to-day operations of the city. The City Manager also prepares the annual budget for Council approval and hires City employees. He/she and the City Attorney are the Council's two appointees.

The city offers many services, including police, fire, code enforcement, animal control, beachfront restrooms and facilities, lifeguards along 4.1 miles of protected beach, a golf course, parks and recreation, two cemeteries, street maintenance, electric, water, stormwater, sewer, sanitation, and natural gas. Sanitation is provided through a third party and EMS transport is provided by the county.

City services are excellent and highly acclaimed. Beaches Energy is very well regarded and received the Diamond designation from the American Public Power Association for being a Reliable Public Power Provider in 2017 and was honored by the Florida Municipal Electric Association with the Building Strong Communities Award, most recently in 2015 and 2017. The Police Department has been accredited by the National Commission on Accreditation for Law Enforcement for 22 consecutive years. The city has received the Government Finance Officers Association awards for both the Comprehensive Annual Financial Report and the Annual Budget for over 20 consecutive years.

Jacksonville Beach is in extremely sound financial condition, and, through long-term planning and capital budgeting, expects to be debt-free by the year 2020. Its FY 2018 budget is \$164,505,457, and the general fund budget is \$21,520,576. The large majority of the difference comes from and goes to the city's utility operations. It has 343 full-time employees and 134 part-time. The largest departments are police (90 full time employees) followed

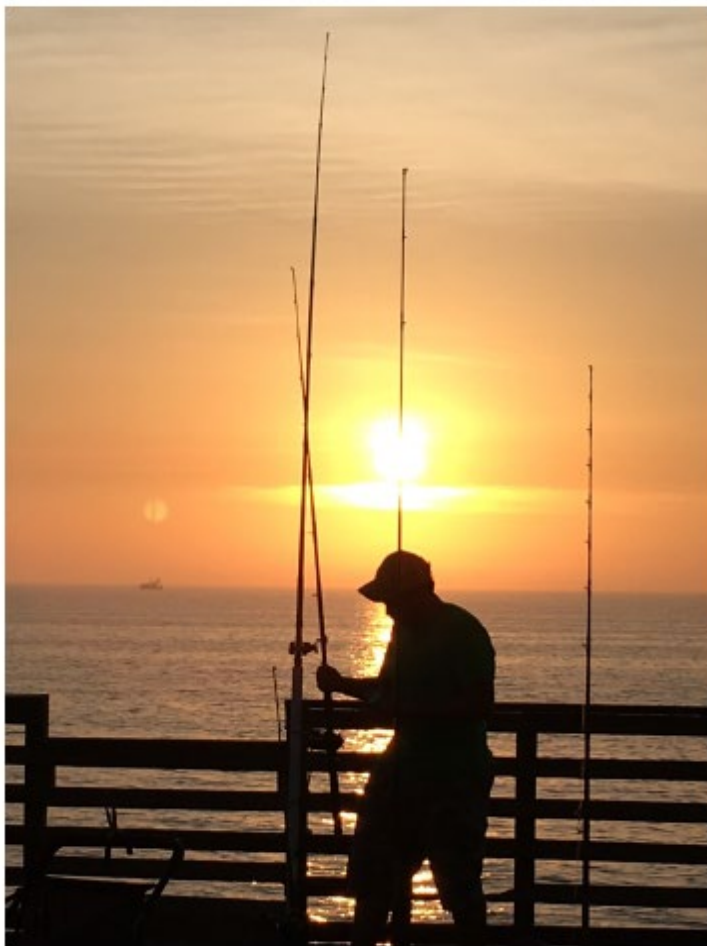
by Beaches Energy (75 fulltime) and public works (67 fulltime). The city has three unions—the Fraternal Order of Police, the International Association of Firefighters and the Laborers' International Union of North America.

THE CHALLENGES AND OPPORTUNITIES

Over the past 20 years, Jacksonville Beach has made a remarkable recovery. The once blighted downtown is now a destination for residents and tourists alike. The city is extremely well run and financially sound. It is not, however, without its issues.

First, while the downtown has made remarkable progress, it is not yet where the city wants it to be. By day, the downtown is a comfortable, family-oriented beach area. From about 5 p.m. to 10 p.m., it is frequented by those out for an evening dinner and a stroll. After 10 p.m., however, the dynamic shifts and until 2 a.m., when the bars close, the area is frequented by a much younger crowd. The influx of this late-night crowd creates significant issues that require additional policing efforts. You can read about recent incidents on the internet. The city and its residents are ready to eliminate this problem. The next manager will play a large role in helping create the solution. Jacksonville Beach's downtown has the potential to rival Florida's best—Naples, South Beach, and Delray Beach.

Intergovernmental relations are a focus area. In 1968, all but four cities (Jacksonville Beach, Atlantic Beach, Neptune Beach, and Baldwin) consolidated to become Jacksonville-Duval County under one government. That created a David and Goliath situation. Cooperation with the consolidated government is essential for many areas, but in particular



because it owns the Fishing Pier in the city, most of the main thoroughfares and the Mike McCue Boat Ramp, all of which are vital to the city's health. Unfortunately, they are not always vital to Jacksonville/Duval's health. The result is repairs to the Pier - Hurricane Matthew washed away 350 feet of it in the fall of 2016—will not be completed at least until mid to late 2019, and the county roads are not as well maintained as the city would like. A related topic is relations with the state. At the present time, the Mayor has very strong relationships in Tallahassee. As noted, however, he will be leaving in 2020 and someone else will need to step up in that area.

A related topic is how the city will provide fire service. Presently, the county provides EMS transport, while the city provides fire as well as some EMS service. The two are currently discussing the possibility of the city contracting with the county for those services.

As with most Florida coastal communities, ensuring that the beach does not recede is a continuing concern. When replenishment is needed, it will require coordination with the county, state and federal governments.

In another area, staffing may become an issue. Salaries at the county government are growing faster than those in the city. Further, as the region's prosperity continues, Jacksonville Beach will need to compete to keep its outstanding employees and that will have a

budgetary impact. A second personnel issue is that some key staff are retiring. The Public Works Director recently retired and the Police Chief will leave in January. The former's replacement has already been hired but the next manager will be responsible for selecting the next Police Chief. Succession planning is an area that will need more focus in the future.

Finally, whoever is selected will follow a very successful, long-term manager. After 23 years of extremely successful leadership, he has left very big shoes to be filled. Therefore, team building should be a priority for his replacement.

THE IDEAL CANDIDATE

Jacksonville Beach is seeking a highly motivated leader with a commitment to team and participative management. The individual will be a strong, experienced, ethical, forward thinking professional manager with a commitment to keeping abreast of new technology and other issues relating to local government management, an outstanding leader who will partner with the City Council, staff and residents to make the city the best it can be. He/she will be extremely competent as demonstrated by a track record of achievement. The individual will be a trusted advisor and skilled in building relationships and consensus. At the same time, the city is not looking for a yes man or woman. He/she will have a strong backbone and will be comfortable telling the Council diplomatically what it needs to hear rather than what it wants to hear. Speaking candidly to them and others will be important. The manager's only interest will be doing the right thing for the right reasons and what is best for the city and its residents.

The ideal candidate will be approachable, proactive, innovative, and have a passion for the city. He/she will be comfortable in the community and spend time interacting with residents and business owners. Providing outstanding customer service will be a core value and the manager will accept nothing less than excellence. He/she will lead by example, recognizing the customer may not always be right but their concerns must always be taken seriously, and treated with dignity and respect, with an effort made to resolve the issue favorably. Where the concern cannot be resolved to the customer's satisfaction, an explanation of why will be provided.

The manager will be a people person and have outstanding communications skills not just in speaking and writing but also listening, diplomacy and finesse. He/she will be able to break highly complex issues into simple pieces that everyone can understand. The individual will understand the need to share information and promote transparency. He/she will handle stress well and remain calm, rational, and effective in moments of crisis. When a problem arises, the manager will understand it, and deal with it quickly.

Personally, the next city manager will be upbeat, friendly, outgoing, intelligent, organized, cheerfully persistent, and positive—someone with a "can do" attitude and one who is visionary yet practical, and definitely not a bureaucrat. While process is important, he/she will realize it cannot override common sense. At the same time, the individual will be humble and recognize he/she does not have all the answers. The individual will be naturally curious and have strong analytical skills. The best candidate will be open to new ideas and willing to learn from everyone, including subordinates. He/she will know giving others



the credit is often the best way to get things done. The manager will be honest and exhibit unquestioned integrity.

The manager will like a challenge, think strategically, and visualize solutions. The individual will be able to anticipate potential issues and resolve them before they become problems. The best candidate will understand the importance of the day-to-day, but will not let it divert his/her attention from the need to plan for the long term and from accomplishing what needs to be done to ensure the city's future success. He/she will be able to look over the horizon, anticipate potential problems and take action to ensure they never come to fruition. The individual will constantly seek better ways to accomplish the city's mission, strategies, and day-to-day business. Knowledge of the application of information technology to optimize processes will be useful.

Overall, the staff is very strong and needs a leader, not a micromanager. The ideal candidate will set forth priorities, delegate, and then step back and allow those responsible to achieve the results. In fact, the individual will realize the staff members are the city's most important resource and offer encouragement, reward success and win their respect. Part of the manager's role will be to be a mentor and to help staff reach its full potential. That said, the next manager will ensure he/she is kept informed, expect deadlines to be met and anticipate timely results.

As noted, Jacksonville Beach is extremely strong financially, and the next manager will need to continue that tradition. As such, he/she will be extremely skilled in budgeting, finance, and fiscal management. Given the city has three unions, it will be important that the new city manager have demonstrated successful experience in labor relations and collective bargaining.

Experience working with Community Redevelopment Agencies (CRAs) and with redevelopment projects is important. Jacksonville Beach is largely built out so future growth will come from replacing what is already here. As a result, experience with infrastructure development/replacement projects will also be critical.

Skill in intergovernmental relations and building partnerships with other agencies will be critical. Knowledge of and experience in the operation and management of utility systems (including electric, gas, water, wastewater, and stormwater) is a significant plus. The ideal candidate will have at least seven years of progressively responsible experience in municipal management and at least five years as the manager or assistant manager. A Bachelor's degree from an accredited college or university, with a major in administration, management or a related field, is required. Finally, the City Council hopes to find a manager who will view Jacksonville Beach as a jewel in its own right and not a stepping stone. It hopes its next manager will honor the practice of its most recent manager and stay a long time.

COMPENSATION

The salary range is \$140,000 to \$170,000. The actual salary will depend on qualifications and experience. Benefits are

excellent. The City Manager can join the city's defined benefit pension program with full retirement at age 62 and 10 years of credited services or have contributions made to a 457 deferred retirement plan.

THE MOST RECENT CITY MANAGER

The most recent city manager is retiring after 23 years with the city.

RESIDENCY

The city manager is required to reside within the city limits during his/her tenure as manager.

HOW TO APPLY

E-mail your cover letter and resume to Recruit49@cb-asso.com by August 24th. Faxed and mailed resumes will not be considered. Questions should be directed to Colin Baenziger at (561) 707-3537 or David Collier at (772) 220-4320.

INTERNAL CANDIDATES

No internal candidates are expected to apply.

CONFIDENTIALITY

Under the Florida Public Records Act, all applicants are subject to disclosure upon receipt. As a practical matter, we do not expect extensive coverage until after semi-finalists are named on October 1st.

THE PROCESS

Applications will be screened between August 25th and September 30th. Finalists will be selected on October 1st. A reception and interviews will be held on October 11th and 12th with a selection shortly thereafter.

OTHER IMPORTANT INFORMATION

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

ADDITIONAL INFORMATION

For additional information about the city visit:

<http://www.jacksonvillebeach.org/>



COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING

Appendix C

Sample Candidate Report

Sample Candidate Report

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

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Cover Letter and Resume

March 26, 2020

Mr. Colin Baenziger
Colin Baenziger & Associates
2055 South Atlantic Avenue, Suite 504
Daytona Beach Shores, Florida 32118

Dear Mr. Baenziger:

Please accept the enclosed résumé for the position of City Manager for the City of Cape Coral, Florida. I am confident that my organizational and leadership abilities, educational background, and diverse professional experience are well-suited to the specific requirements of the position.

As indicated in the enclosed résumé, my professional background includes more than 25 years of progressive and responsible local government management experience. As an ICMA Credentialed Manager, I presently serve as the deputy city manager for the City of Fort Lauderdale, Florida. Prior to Fort Lauderdale, I served as the city manager for the City of Savannah, Georgia. In that capacity, I reported to a nine-member city council, created a new strategic plan - [SAVANNAH FORWARD](#), led a family of 2,513 exceptional employees, and implemented a lean operating budget of \$408 million and a capital improvement plan in excess of \$407 million.

My previous experience includes serving as deputy county administrator for Broward County Florida; deputy county manager for Fulton County, Georgia; and assistant to the county administrator, Broward County, Florida. Collectively, my service in these progressive communities has provided me with extensive knowledge and expertise in all aspects of local government operations including affordable housing, strategic planning, transportation, budget development, community services, economic development and community revitalization, human services, and public safety, among others.

I am confident that I bring the right skills, experience and talents to the position. If you would like to schedule an interview or discuss my interest in the position, please contact me at (954) 940-1065 or at robhernandez@comcast.net. Thank you for your consideration.

Sincerely,

Roberto Hernandez

Roberto Hernandez

Enclosure:
- Résumé

ROB HERNANDEZ

1873 Northwest 113th Way, Coral Springs, Florida 33071 | 954-940-1065 | robhernandez@comcast.net

Profile

Proven, resourceful, and results-focused public administrator with more than 25 years of progressive local government management experience. ICMA-Credentialed Manager known for leadership, professionalism and organizational abilities.

Relevant Experience

Deputy City Manager City of Fort Lauderdale, Florida	2019 - Present
City Manager City of Savannah, Georgia	2016 - 2019
Deputy County Administrator Broward County Board of County Commissioners; Fort Lauderdale, Florida	2013 - 2016
Deputy City Manager City of Coral Springs, Florida	2011 - 2013
Deputy County Manager Fulton County Board of County Commissioners; Atlanta, Georgia	2008 - 2011
Assistant to the County Administrator Broward County Board of Commissioners; Fort Lauderdale, Florida	2003 - 2008
Various Positions Broward County Board of Commissioners; Fort Lauderdale, Florida	1994 - 2003

Education

Master of Public Administration
Nova Southeastern University; Fort Lauderdale, Florida

Bachelor of Public Administration
Florida International University; Miami, Florida

Current Professional Affiliations

International City / County Management Association (ICMA) – Credentialed Manager

Florida City / County Management Association

Broward City / County Management Association

Candidate Introduction

EDUCATION

- Master of Public Administration, Nova Southeastern University
- Bachelor of Public Administration, Florida International University

EXPERIENCE

- | | |
|--|----------------|
| • Deputy City Manager; City of Fort Lauderdale, FL | 2019 – Present |
| • City Manager; City of Savannah, GA | 2016 – 2019 |
| • Deputy County Administrator; Broward County, FL | 2013 – 2016 |
| • Deputy City Manager; Coral Springs, FL | 2011 – 2013 |
| • Deputy County Manager; Fulton County, GA | 2008 – 2011 |

BACKGROUND

Fort Lauderdale is the largest municipality in Broward County and the ninth most populated city in Florida, slightly ahead of Cape Coral. Smaller in geographic area than Cape Coral, the city encompasses 38 square miles with a population of 186,220. A popular tourism destination, the city is often referred to as the “Venice of America” because of its many inland waterways, not too dissimilar to Cape Coral’s “Water Wonderland” designation.

The City of Fort Lauderdale is a full-service municipal corporation that provides police protection, fire-rescue services, parks and recreation programs, potable drinking water to a service area both within and outside the City limits along with wastewater collection and treatment, sanitation services, development regulation, parking, and street maintenance. The City also operates a general aviation airport, a downtown heliport, an aquatic complex, and an auditorium. Its current general fund budget is more than \$373.7 million or \$832.7 million in total.

As the deputy city manager, I assist the city manager in overseeing municipal operations, specifically coordinating the activities of the Transportation and Mobility, Public Works, Sustainable Development and Parks and Recreation departments. Collectively these departments have a combined operating budget of \$380 million and 1,527 full-time employees.

The three most critical issues facing the city are:

- Infrastructure
- Resiliency
- Affordable Housing

Both Fort Lauderdale and Cape Coral have identified infrastructure as key elements of their adopted strategic plans. Fort Lauderdale’s emphasis is by necessity due to a series of recent high-profile infrastructure failures and a state mandated consent order. Fort Lauderdale’s initial development boom occurred between the 1950s and 1970s during which the majority of the city’s

infrastructure was installed. Materials of that era include cast iron pipe which is now failing regularly as a result of corrosion and erosion. From the 1990s until today, the city experienced a vertical development boom witnessed by large-scale redevelopment on its barrier island and downtown. This explosive growth was not matched by investments in infrastructure capacity, redundancy, and resiliency. Missteps occurred along the way, including transferring more than \$20 million annually from the Water and Sewer Fund to the General Fund as a “return on investment”, reduction in preventative maintenance activities, and failure to modernize its primary water treatment plant. The consequences of these decisions would surface years later as sewer main breaks, water line breaks, and flooding would disrupt life throughout the city. The City has identified more than \$1.2 billion in needed infrastructure improvements over the next 25 years. In addition to rectifying years of disinvestment in its water utilities, the City’s park system and public safety facilities have suffered a similar fate. The City is now implementing a \$200 million parks bond and \$100 million replacement police headquarters bond referendum to improve those facilities.

Sea level rise is Fort Lauderdale’s second biggest issue. Fort Lauderdale has made adaptation to climate change and rising sea levels a top priority. Many neighborhoods in Fort Lauderdale now experience chronic flooding on a regular basis. According to recent projections issued by the Southeast Regional Climate Change Compact, 10-17 inches of sea level rise by 2040 and 21-64 inches are possible by 2070. The City now requires the impact of sea level rise to be incorporated in future infrastructure master plans. Also, City-owned seawalls are being replaced and elevated, tidal valves have been installed in flood-prone areas, and the City is exploring the feasibility of raising road elevations in certain neighborhoods that are threatened by sea level rise.

Fort Lauderdale’s housing costs are now among the highest in the nation. More than 60 percent of households in the city spend more than 30 percent of their income on housing. The price of single-family homes has increased 41 percent since 2013. In 2018, the median sale price for a three-bedroom home was \$440,000. A four-bedroom home is now \$835,000. Given the high cost of homeownership, many are forced to rent; however, rental costs are equally unaffordable with the average two-bedroom rental costing \$2,705 monthly. Three bedrooms, \$3,204. The City is attempting to incentivize various housing types to support all income groups by providing zoning incentives such as height and density bonuses, no- or low-interest loans, or grants to developers to facilitate the construction of more affordable units. Without an affordable and diverse housing stock, the city, county, and region will not succeed in creating a diversified and balanced economy.

GENERAL MANAGEMENT STYLE AND EXPERIENCE

Cape Coral is a jewel for public administration professionals to practice their craft in a progressive environment. The challenges in Cape Coral are similar to those I have faced throughout my career as a city manager or deputy manager. For those reasons, I believe that the combination of my experience as a proven leader understanding local government in Florida, the ability to work with elected and appointed officials and the ability to understand and solve problems will allow me to excel as Cape Coral’s next city manager.

Many can manage but few can lead. Management is something I did earlier in my career; at this point in my professional career and personal life, I believe it is more important to exercise leadership. As leaders, we must communicate a clear vision and direction. We must demonstrate a passion for what we do – that is, to make a difference every day. For me, leadership is situational. When time, resources, and skills permit, my leadership style is participatory and collaborative. In other circumstances, it must be directive.

Great leadership is infectious. People are your greatest assets. It is important to create an environment where people want to work hard by making things fun, challenging, and rewarding. I believe in building a positive work climate where people are appreciated and valued. I like to consider myself a “macromanager” rather than a micromanager. I view my role as explaining the project or task, the expected result and deadline, and monitoring performance on a regular basis. I track projects and assignments using a Sharepoint site and meet with staff on a routine basis to review progress. I meet with staff more frequently on an as-needed basis. I describe what needs to be done, provide them the resources, get out of their way, and hold them accountable. So far, I think this approach has worked.

I am confident that staff and elected officials would describe me as professional, thorough, hard-working, ethical, honest, opinionated, and transparent. They would hopefully view me as engaged, participative and inclusive and valuing open communication and feedback, while also allowing for empowerment and accountability.

Two strengths that others will point to are my transparency and ability to make strategic decisions. In terms of a weakness, I believe that my commitment to my organization and loyalty to my teammates has led others to conclude that I can be defensive at times.

Regarding performance measurement, I believe it starts at the top with the governing body establishing a clear strategic vision for the organization, and cascades downward. Once key strategic objectives are defined by the governing board, it is the manager’s job to develop strategies to meet those strategic objectives. Business units then must identify those operational efforts and measures that are aligned with the strategies and long-term objectives. Those help form the basis for developing individual performance measures that are included in performance reviews.

In terms of a significant professional achievement, the revitalization of the Fulton Industrial District (FID) in metro-Atlanta, one the largest industrial, warehousing and logistics centers in the southeastern United States, is one that I am most proud of. In the fall of 2008, I toured FID as Fulton County’s new deputy county manager. What was once a leading center of economic activity was now rife with rampant prostitution, open drug sales, shuttered buildings, neglect, and decay. FID was well into a state of decline that began in the 1980s as its warehouses were abandoned for taller and larger ones elsewhere and manufacturing disappeared overseas. I observed conditions that I had never seen in my career until that day. Families called extended stay motels home. A police detective explained how FID was the child prostitution hub for the entire metropolitan Atlanta region. After a woman was found locked in a dog crate in one of FID’s many hotels, I was horrified and said: “not anymore – not on my watch.”

For the next three years, we made it our mission to make FID better. We used every conceivable resource within county government and put together a team of county agencies that included everything from arts to zoning. We rolled up our sleeves and went to work. We attacked the issues from every angle: from health to human services to public safety. With the help of a dedicated team, we accomplished a remarkable turnaround that included:

- Adoption of the Fulton Industrial Redevelopment Framework
- Designation by the State as an “Opportunity Zone”, providing needed economic incentives
- Establishment of the Fulton Industrial Community Improvement District, a self-taxing entity to take on area wide governance and improvements
- Establishment of the South Fulton Service Center which relocated two county commissioners, police, fire, and all other unincorporated area services to FID

Today, FID is healthy and vibrant. It is now a place where businesses invest rather than flee.

My biggest disappointment thus far involves the establishment of a fire assessment fee in Savannah. A \$14 million budget deficit welcomed me upon arriving in Savannah in October 2016. As I tackled the deficit with my new team members, I realized the City had a structural imbalance that needed a long-term solution. Although revenue growth was respectable, it lagged projected expenditures well into the future. Working with the city council, we agreed to a stopgap approach for Fiscal Year 2017 with the understanding that we would bring back long-term options the following year. Fiscal Year 2018 presented a \$12 million imbalance and to address it, I proposed a fire service assessment using an approach and the same consulting firm as Cape Coral. After spending considerable time and effort creating such a fee, the city council adopted the budget with this fee. The fee provided financial stability, allowed us to lower the millage rate, and provided resources to address capital needs and service priorities. The fee was controversial and faced stiff public resistance. Continued opposition to the fee caused the city council to reverse its decision midway through the fiscal year, requiring us to identify more than \$16 million in new revenue and expenditure reductions. Rescinding a budget halfway through the fiscal year was disruptive to operations. In retrospect, I did not anticipate such stiff opposition since we held more than 60 community meetings and thought we had obtained community buy-in to the extent we could. Newspaper editorials supported our approach. In the end, the fire assessment was reversed, the equivalent of two engine companies eliminated from the fire department’s budget, and the millage rate increased. The painful lesson I learned throughout all of this is that local government must do a better job educating the public on how well it is performing and safeguarding the public’s resources. It was a painful lesson – it still hurts to sit to this day.

Employee terminations are always an unfortunate aspect of what we do as leaders. Unfortunately, I have had to dismiss employees throughout my career for poor performance or poor leadership. While it is never an encounter that brings pleasure or satisfaction, these separations were not a surprise to the affected individual. In every instance the individual was counseled and made aware of performance deficiencies beforehand, corrective actions identified, and the consequences of not meeting the performance standards explained. I hope that in every instance, I treated the employee with respect and dignity. I allowed them to “write their final chapter” with the organization and

allowed them to leave at the top of their game with a celebration of their accomplishments to the organization.

The issues and challenges facing Cape Coral's next city manager are:

- Leading in the Post COVID-19 Era.
- Ensuring continued Smart Growth.
- Continuing to expand and upgrade critical infrastructure.

Sadly, Cape Coral's next city manager will have to lead the organization through the aftermath of Covid-19's devastation. Although the City has a diversified revenue base not overly dependent on one specific funding source, it can expect revenues of all types to be impacted. While the financial realities of the pandemic will become clearer in the months to come, Cape Coral's next city manager will need to assess the financial impacts and determine how to continue basic municipal services, allow for certain aspects of the local economy to resume and balance the workforce and service demands with the new fiscal realities.

Second, Cape Coral's next city manager will need to continue to position the city for growth once the post-COVID 19 recovery begins to take shape. The City will need to continue progressive land use policies and zoning incentives to attract orderly and smart development to greenfields and redevelopment. Promoting growth in the tax base and employment for the city's residents must be a top priority. Fortunately, Cape Coral is well-positioned to attract further economic investment once the nation and the state adjust to the realities of the post-pandemic world.

Finally, investments in infrastructure must continue to drive the next city manager's agenda. During difficult times, many municipalities defer or eliminate investments in critical infrastructure improvements. This is a grave mistake and the next city manager must avoid the urge to gut capital investment plans. Since capital investments are long-term in nature, it is important that Cape Coral's next city manager appreciates the need to ensure adequate investments are made in all facets of municipal infrastructure including roadways, water utilities, facilities, and information systems. For Cape Coral, this includes expanding infrastructure utilities to areas currently not served plus parks and open space to accommodate neighborhood growth. The benefits of such continued investment will pay off in the longer-term. It is important to take a long-term view rather than an immediate one, however painful it may be.

If selected for the position, during my first six months I will:

- Listen, listen, and listen to understand issues, challenges, and desires of all stakeholders: elected officials, neighborhood groups, organized labor, business community, education representatives, the local media, and others;
- Forge a close relationship with the City Council and Mayor;
- Review goals and objectives for the organization with the Mayor and City Council;
- Reach out to department directors and learn about their challenges, priorities, and programs;

Rob Hernandez

- Meet as many employees as possible by conducting several “town hall” sessions;
- Establish trust and credibility with all stakeholders; and.
- Become familiar with the community and its culture.

As for media relations, I appreciate the work the media does. The media can be a great asset if managed properly and cultivated. Being open and honest with them is important. Integrity is an essential part of the relationship with the media. In Savannah, I practiced an open-door policy with the media and reserved a better part of Tuesdays to meet with them. I am not aware of anything in my background that could be considered embarrassing to a potential client.

Social media is an effective tool in keeping the public informed and is changing how government communicates with its various constituencies. I have used social media, primarily twitter, to keep interested individuals informed with short briefs on an issue. This helped us shape our story and put us in leading the community conversation rather than delegating that role to media. I have used social media to help sustain interest on an issue and to keep the public informed on upcoming discussions or significant events. During workshops or regular meetings of my elected body, we would “tweet” aspects of the discussion. In Fort Lauderdale, we rely on ZenCity to help us mine social media on a regular basis to help us gauge public sentiment on a variety of issues.

There is “no dirt” on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night. I also treat people with professionalism and respect. I am honestly not aware of anything in my professional or personal lives that could be viewed negatively. However, while serving as the city manager of Savannah, there were a few individuals who were not supportive of my efforts or views. You may find some blogs critical of my opinion on building materials in the city’s landmark historic district, my hesitance in assuming the operating costs of a regional expressway, and of the ill-fated fire assessment. Regardless, I always conducted myself professionally and never brought any negative attention to the elected officials or the organization I worked for.

My personal interests include the outdoors and pursuing home improvement projects.

ADJECTIVES OR PHRASES THAT DESCRIBE ME:

Driven, Professional, Focused, Disciplined, Organized, Thorough

REASONS FOR CONSIDERING LEAVING CURRENT POSITION:

I am considering opportunities beyond Fort Lauderdale because I believe that I can have a greater impact on an organization and a community by serving in the top leadership role.

CURRENT SALARY

+/- \$217,000 plus \$4,680 auto allowance and \$1,310 cell phone allowance.

CB&A Background Checks

**Background Check Summary for
ROBERTO HERNANDEZ**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
State	
Florida	No Records Found
Georgia	No Records Found

Civil Records Checks:

County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
Federal	
Florida	No Records Found
Georgia	No Records Found

Motor Vehicle

Florida	No Records Found
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Credit	Very Good
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Bankruptcy	No Records Found
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Education	Confirmed
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Employment	Confirmed
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Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern.

**Background Check Summary for
ROBERTO HERNANDEZ
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: ROB HERNANDEZ

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Do you have a personal My Space, Face Book or other type of Web Page?
Yes ☐ No ☒
9. Do you have a personal Twitter Account?
Yes ☐ No ☒
10. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
11. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
NONE

Attested to: _____


Signature of Applicant

Please email this form via PDF DOCUMENT to Lynelle@cb-asso.com or via fax to
(888) 539-6531 no later than 5:00 PM PST 04/13/2020.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Property of Colin Baenziger & Associates

CB&A Reference Notes

Reference Notes

Roberto “Rob” Hernandez

Elizabeth Taschereau – Director of Developmental Services, City of Margate, FL
954-884-3686 954-218-9798

Ms. Taschereau has known Mr. Hernandez since 2011 when he was hired as the Deputy City Manager for Coral Springs. She was the Community Redevelopment Agency Coordinator and reported to him. She later followed him from Coral Springs to the Savannah when he became the City Manager. She had enjoyed working for him and had wanted to continue learning from him so much that she willingly commuted between her home in Florida to her job in Georgia. After he left Savannah to go to Fort Lauderdale, she also left.

Mr. Hernandez was a successful and professional leader. He had strong project and time management skills. Ms. Taschereau especially admired how well he kept track of numerous project deadlines on his calendar, which she had access to when working under him. He worked well with team and delegated excellently. The only possible weakness he had was his high expectations. He strove to accomplish much, and he expected his staff to perform similarly. Such expectations may have been overwhelming for some who were unsure of their abilities to accomplish their tasks. However, staff members were able to look back and be amazed by how much and how well they accomplished those tasks. Though his high expectations were a challenge for some, many Cities turned around for the better because of his drive.

Mr. Hernandez worked on numerous high profile projects, such as building a new city hall. The old city hall was built in 1905. It was very much out of date and far too small for a city of Savannah's size. That said, building a new city hall spurred a great deal of controversy over architecture and location. Recognizing it as a critical need, Mr. Hernandez took charge of the project and eventually achieved community acceptance of the building's location downtown and of the architecture. It all came about in approximately a year and a half and the new city hall celebrated its grand opening in 2018. Another significant project he worked on as upgrading the City's arena while working with a management company. He was able to renovate the facility while negotiating a contract that was eventually approved by the County Commissioner. It was a huge accomplishment.

Mr. Hernandez was very inclusive of employees in projects, meetings, emails, status reports, memos, and other forms of communication. He communicated in a way they easily understood, and he expected his staff to communicate with him. Such an inclusive mindset was different for staff from the Cities of Coral Springs and Savannah, where the culture was less inclusive. He managed several internal and external projects that involved multiple people across different divisions. Many commented how they had not enjoyed such high communication levels before Mr. Hernandez came. Previously, little communication occurred between divisions. As such, decisions were delayed and less efficient. When he effectively included different groups to integrate on multi-division projects. He helped projects move forward.

Mr. Hernandez also generally made good decisions. He had high integrity. He made the best recommendations and decisions possible for the community as a whole. He did consider the input of groups with special interests, but he strove to make the best possible decision. He also made good decisions with staff members. For example, he reorganized the Savannah City staff, which

Reference Notes

Roberto “Rob” Hernandez

composed of approximately 2,400 employees. This momentous change created openings, which he filled with sharp and high performing individuals. The new employees immediately began planning and establishing standard procedures. The City began to change, and consequently, so did the community. Furthermore, Mr. Hernandez greatly believed in committees. He formed several committees with the Human Resource Department and with staff, sometimes even bringing in external panel members if necessary. He wanted people in high-level positions to make decisions together.

As a great public speaker, Mr. Hernandez worked well with the public. He always remained composed and professional. He had excellent presentation skills. People were generally perceptive to his ideas when he spoke, and he communicated well when invited to speak for different organizations. Even if some people at those meetings were exceedingly unprofessional toward him, he managed himself well. He performed well despite those difficulties. In addition, Mr. Hernandez worked well with individuals. He educated others, providing recommendations on what the Mayor and others needed to vote on. Because of these interpersonal abilities, Mayor and Councilmembers voted on multiple successful projects. Moreover, Mr. Hernandez had good financial skills. He used a hands-on approach with the city budget and worked closely with chief financial officers and the Budget Director. He wanted to ensure he understood the budget accurately.

Though a change agent, Mr. Hernandez did not seek change for the sake of change. He carefully evaluated a City’s situation, whether involving technology, processes, or even City culture. He observed how others managed tasks before he made necessary changes to keep the City moving forward. Ms. Taschereau has done her best to incorporate this valuable lesson into her own leadership skills. Also, Mr. Hernandez an effective problem solver. He solved numerous issues that had existed for long periods of time. Some problems required many changes and more money, which made certain solutions difficult to implement. He attempted to solve these, and then he put plans into place to initiate these necessary changes once enough resources were available. Other problems were out of his realm of influence. As such, Mr. Hernandez made good recommendations, even if people did not follow his advice.

Ms. Taschereau is unaware of anything in Mr. Hernandez’ personal or professional background that will concern a future employer. She would definitely hire him if possible. As someone who has worked for him, she knows how good he is at overcoming challenges and managing a city. Mr. Hernandez is passionate about municipal work. He wants his employers to be high-performing organizations. He has been and will continue to be a very good Manager.

Words or phrases used to describe Roberto Hernandez:

- Successful,
- Professional,
- Collaborative,
- Inclusive,
- High integrity,
- Good speaker, and
- Influential.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Project management, leadership and staff management, presentation abilities, financial understanding.

Weaknesses: His high expectations can be daunting at time, but his expectations drive people to accomplish goals they previously thought they were incapable of achieving.

**Skye Patrick – former Director of Libraries, Broward County, FL 562-940-8400
562-659-1155**

Ms. Patrick has known Mr. Hernandez since 2014. She really enjoyed working with him and learned much from him.

Public Administration was Mr. Hernandez’s strong suit. He was thoughtful and he understood County policy and procedures very well, which meant he navigated in a way that was very helpful to his department. He did not know much about the library system when he was hired, but he studied and learned about how they operate and developed a good understanding.

The Directors hired by Mr. Hernandez were very good selections. He sat on the panel that hired the Finance and Business Administrator, and helped with the searches for the Aviation Director and Human Services. When making decisions in general he was very thoughtful and took the time to gather information.

In general, Mr. Hernandez maintained the organization at a high level and had learned from his department heads to be innovative and creative. They had a monthly meeting where Mr. Hernandez provided information on organizational changes. Ms. Patrick headed a very large organization with many issues. He was always available and responsive.

Some community members were very aggressive. Mr. Hernandez took the time to attend both scheduled and off the cuff meetings with individuals who had concerns about an issue. His openness and willingness to address an issue immediately, without any delay, was impressive.

In his capacity Mr. Hernandez really tried to lead the organization, and was creative and thoughtful in meeting goals. He worked very well with the Board, which consisted of nine voices with sometimes conflicting concerns. He protected the department heads when necessary and did a great job balancing the administration and the politics, which is no small feat.

Several major personnel issues involving union members were escalated to upper management. Mr. Hernandez was not required to attend the meetings but he came to help negotiations. The union had between 500 and 600 members. He helped navigate the very rocky road between the union relationship and County protocol. He showed great initiative in addressing problems that existing prior to his arrival. He helped resolve long-standing issues in only 2 to 3 meetings.

Mr. Hernandez was given directives to create a business plan for the new Panther Stadium. The process took several months and he worked with several departments to create the business model. He also worked on a new transportation plan that was very complex. The process has spanned for several years and involves 15 of the 31 cities in Broward County.

Reference Notes

Roberto “Rob” Hernandez

They were short 800k in a capital budget of \$5 million dollars. Mr. Hernandez worked with the staff to review the overall budget and prioritize projects. Several of the big-ticket items related to technology were prioritized, and he found a way to upgrade their enterprise software.

They only knew each other for a few years, but Ms. Patrick does not know anything controversial that involves Mr. Hernandez.

Broward County has a \$6.5 million dollar budget with 31 cities plus some incorporated areas. Ms. Patrick would hire Mr. Hernandez and feels he is well suited to run a community the size of Broward County or slightly larger. Every department head he worked with has a positive opinion of his management and leadership qualities. Employees are comfortable working with him and felt very supported by him. He ensured that Ms. Patrick had the financial resources she needed. She confidently recommends him for a Manager position.

Words or phrases used to describe Roberto Hernandez:

- Extremely thoughtful,
- Very intelligent,
- Incredible business mind,
- Perfectly capable administrator,
- Incredible leadership qualities, and
- Shows initiative and foresight to present quantifiable outcomes.

Strengths: Thoughtful; understands policy and procedures; public administration; learns what he needs to know.

Weaknesses: He could have a greater understanding of the different lines of work that each department head was responsible for.

Van Johnson – Mayor, City of Savannah, GA 912-651-5988 912-651-6444

Mr. Johnson worked with Mr. Hernandez between 2016 and 2019 when Mr. Hernandez became the Savannah City Manager. Mr. Johnson and Mr. Hernandez had a good relationship.

Mr. Hernandez performed decently as City Manager. He was smart, strong-willed, and a hard worker. He was a workhorse who innovatively tried to find solutions to problems. He was always quite professional, cordial, and direct. At times, his passion and directness may have caused people to think Mr. Hernandez was emotional or overly direct. However, these traits were a function of his military background.

Mr. Hernandez had good communication skills. He kept Mr. Johnson informed via email, phone, and personal communication when appropriate. Mr. Hernandez generally made good decisions and usually made good decisions when hiring personnel. He was customer service oriented. He accomplished tasks in a timely manner.

Additionally, Mr. Hernandez tried to make the City to a high-performing organization. He recognized several structural financial issues within the City and put the City on track. He was

Reference Notes

Roberto “Rob” Hernandez

both a leader who rallied employees around the organization’s vision and a manager who oversaw processes behind a desk. He worked hard to effectively solve problems to the best of his abilities. For example, he brought about a strategic plan for the City, which had not existed prior to Mr. Hernandez’s arrival. He led the Council and the organization to determine a goals and priorities. The Savannah Forward strategic plan is still currently used.

One of the largest criticisms against Mr. Hernandez was that he was less social than the public expected their Manager to be. Certainly, he was kind and polite. He had experience working with the public and sometimes was out in the public attending community meetings to represent the organization. However, he often worked more than he socialized.

At times, Mr. Hernandez experienced some difficulties wading through the City’s Council-Manager form of government. These hardships were not entirely his fault because some councilmembers violated these lines at times. Usually, Mr. Hernandez persevered. Eventually, these challenges became too much for him to bear. For example, he proposed instituting a City fire fee similar to what Florida cities used to address the City’s structural deficits. The Council accepted the idea. However, when the public became upset with the fee, the Council blamed him for the failure. Furthermore, the previous Mayor needed a scapegoat for some of his poor decisions and blamed Mr. Hernandez – even though the City Manager only carried out decisions made by the City Council.

Mr. Johnson is unaware of anything in Mr. Hernandez’s background that will concern a future employer. If given the opportunity to rehire Mr. Hernandez, Mr. Johnson would consider him as a candidate. Given the difficult circumstances in Savannah, Mr. Hernandez was a great Manager.

Words or phrases used to describe Rob Hernandez:

- Smart,
- Strong-willed,
- Hard worker,
- Good work ethic,
- Innovative, and
- Professional.

Strengths: Work ethic, innovative solution finding.

Weaknesses: Mr. Hernandez’s passion and directness may have been misconstrued as being emotional or overly direct.

Claudette Bruck – former Commissioner, City of Coral Springs, FL 954-562-2526

Ms. Bruck has known Mr. Hernandez since 2011. He was their Deputy City Manager for all too short of a time. They were sad to see him leave and would love to have him back.

Mr. Hernandez was extremely bright, very diligent and focused. When he first came to the city he first stood back and analyzed the organization. When it was his turn to speak, he impressed

Reference Notes

Roberto “Rob” Hernandez

everyone. His presentations are flawless but factual. Everything he said was entirely trustworthy; he presented information he could stand behind.

Their interactions were all professional. Mr. Hernandez was very respectful. He listened and was prompt in responding to inquiries. His decisions when hiring personnel were very good. He was innovative and operated at a high performance level. He listened, assessed a situation, and then came forward with an excellent recommendation. He was very experienced and innovative.

Mr. Hernandez frequently gave presentations at workshops, commission meetings and community meetings and always did an excellent job. He had good rapport with the audience and a demeanor that invited trust.

Mr. Hernandez kept the Commissioners informed as appropriate. The Manager’s office operated independently of the Commission. Rather than reporting in on a daily basis, they did so at special meetings or as needed. Mr. Hernandez did not have the opportunity to work one-on-one with residents, but he did present information about projects to the community. He was always prepared and answered questions on the spot.

The Commission received much information from varying sources, and the information was not always accurate. They felt very fortunate to have Mr. Hernandez on staff and trusted his accuracy. He led the organization well because he earned the trust of employees.

Mr. Hernandez played a significant role in pension discussions. He responded to questions at community and commission meetings. He followed through and was customer service oriented. He always did what said to do. He was not directly involved in the finance department or the creation of the budget, but he had a good understanding of the numbers.

Ms. Bruck is unaware of any controversy involving Mr. Hernandez. She would hire him and feels he would be a great Manager. He was knowledgeable, experienced, task oriented, focused, and could always be trusted. His departure was a tremendous loss to Coral Springs.

Words or phrases used to describe Roberto Hernandez:

- Trustworthy,
- Bright,
- Quick study,
- Serious about his position,
- Honorable, and
- Innovative.

Strengths: Very thorough; brought an idea forward only after it had been thorough researched; good at identifying problems and determining solutions.

Weaknesses: None identified.

Reference Notes

Roberto “Rob” Hernandez

Brooks Stillwell – former City Attorney, City of Savannah, GA 912-484-1690

Mr. Stillwell worked with Mr. Hernandez between 2016 and 2019. During this time, Mr. Stillwell was the Savannah City Attorney and Mr. Hernandez was the City Manager. They worked closely together daily and reported to the City Council.

Mr. Hernandez was a great City Manager operationally. He worked hard and had good fiscal planning abilities. He had several good ideas for the City and was a good strategic planner. He possessed a long-term vision of what he wanted to accomplish and strove to quickly achieve those goals. He was driven and dedicated.

Mr. Hernandez managed day-to-day operations exceptionally well. He worked well with staff members and those close to him in the office. He met with Mr. Stillwell during weekly meetings with City leaders and kept the City Attorney well informed.

As a change agent, Mr. Hernandez came in and proposed several changes to help the City run better. He initiated several positive transformations, such as with implementing the City’s strategic plan. However, Mr. Hernandez implemented other changes too quickly for the historical City to handle. For example, he tried to completely change the City’s property exchange, planning, and financing. Each area’s change was tough individually, but all these at once were especially difficult to maintain.

Savannah is a very unusual city. Its roots go back almost 300 years and Mr. Hernandez did not fully appreciate how the City’s unique historical culture differed from the culture found in his previous positions in Florida. In past jobs, he rarely handled city politics as the person second in charge. In Savannah, he had to involve himself more than he had previously done. The City traditionally expected the City Manager to be its Chief Executive Officer and to be heavily involved with the entire community outside of city government organization. As such, Mr. Hernandez had to work with county officials, chamber commerce, state legislature, and community leaders. Though Mr. Hernandez worked well with staff, he did not see community politics as part of his job, which was a large issue for the City. He frankly did not anticipate the public blowback from some of the programs he recommended the City Council implement. As such, he faced many challenges.

Even though many of his ideas were conceptually good, Mr. Hernandez was unable to bring the public to side with his solutions. For example, he tried implementing a fire fee to unburden property owners’ taxes. He saw the fee as a method of fixing the City’s fiscal problem. Though he initially had the Council’s support, Mr. Hernandez eventually faced huge public backlash. Then some council members tried to politicize the plans which led to the fee being poorly implemented. Mr. Hernandez also tried to implement a union contract with the fire union, which ended up facing public blowback as well. He had little Council support because such a plan did not translate well to Georgia.

Eventually, Mr. Hernandez left the City to return to Florida. Both his wife and he were unhappy with how rough this period was for them. He gave several months’ notice before his resignation.

Reference Notes

Roberto “Rob” Hernandez

Despite these issues, Mr. Hernandez was a great City Manager. He spoke well with public groups. He was an excellent fiscal manager. He generally made good decisions and hired personnel quite conscientiously. He was particularly customer service oriented. He was a leader who had a vision of how to accomplish goals and who tried to mold the City’s organizations to this vision. He accomplished tasks in a timely manner. He set goals and timeframes to move forward. He solved several problems effectively. He successfully implemented the complete reorganization of the City’s organizational department. He worked hard through stress to overcome issues. He also was outstanding with crisis management, such as when the City dealt with two hurricanes.

Any future employer will need to discuss what they expect Mr. Hernandez to do and what he expects to do with public and community leadership. These clear explanations are critical. Mr. Hernandez will perform well under a strong County Manager or strong Mayor who assumes all roles of working with the public. Mr. Hernandez understands how this type of government is organized and will do well in this system. Mr. Hernandez was an excellent City Manager on a whole, just not for the City of Savannah.

Mr. Stillwell is unaware of anything in Mr. Hernandez’s personal background that will concern a future employer. Though Mr. Stillwell would not rehire Mr. Hernandez for the City of Savannah, Mr. Stillwell would definitely hire Mr. Hernandez for most any other municipality. A future employer will not find a more dedicated, hardworking person who can implement ideas well. Mr. Hernandez has been and will continue to make a good Manager.

Words or phrases used to describe Rob Hernandez:

- Tremendously hardworking,
- Good strategic planner,
- Aggressive in a good way,
- Dedicated, and
- Visionary.

Strengths: Long-term planning, fiscal planning, management skills.

Weaknesses: Interacting with public and political leaders was hard for Mr. Hernandez, who was used to a more strictly managerial position.

Zachary Williams – former Fulton County Manager, GA 404-990-6545 404-371-2881

Mr. Williams has known Mr. Hernandez since 1994. They worked closely from 2008 to 2011 when Mr. Hernandez was the Deputy County Manager. He did an excellent job. His work performance, personality, and interactions were outstanding. He was handpicked from South Florida to come and work for Mr. Williams.

Mr. Hernandez had an excellent work relationship with his elected officials. They trusted that what he said to had been well researched. He earned their respect and represented Mr. Williams very well.

Reference Notes

Roberto “Rob” Hernandez

Once he had been given a problem to solve, Mr. Hernandez was tenacious. He marshaled resources and focused them through team building to get the job done. He did not shy away from challenges. He was patient when it was warranted; however, it did not come naturally to him.

Mr. Hernandez preferred face-to-face interactions whenever possible. If meeting a person directly was not an option, then he used the phone. He was an excellent writer and could be successful using email; however, he had developed respect from his subordinates by meeting with them personally, listening to their issues, and explaining his thoughts.

Depending on the nature of the decision that needed to be made, Mr. Hernandez responded quickly. Circumstances that required gathering facts may have taken him longer. He was not indecisive but rather took the appropriate amount of time to gather the information and opinions he needed to make good decisions.

Mr. Hernandez hired good employees. In some instances where a hire did not work out, he did all he could to work with them. He went through exhausted hiring practices involving many stakeholders. He was analytical and used that to his advantage in the hiring process.

Mr. Hernandez was innovative but did not try to change things just for the sake of change. He was mature enough to leave a process alone when it worked well. He had improved existing processes in Fulton County.

Mr. Williams was proud of the redevelopment that was carried out on Fulton Industrial Boulevard. Under Mr. Hernandez’s leadership, an area known for drugs, prostitution, and crime had reversed its negative direction to become an area where businesses wanted to locate. Mr. Hernandez created momentum in this large container warehousing district. He acquired State funding and formed a commercial improvement district.

There were very few tasks in public service Mr. Hernandez could not do well. He is ready to take the helm of an organization and become a Manager. Mr. Williams gives him his full and complete endorsement and support. Mr. Hernandez was one of the best public servants Mr. Williams has ever worked with.

Words or phrases used to describe Roberto Hernandez:

- Embodies what public service should be,
- True believer in the mission to make other people’s lives better,
- Tenacious,
- Analytical,
- Hardworking, and
- Professional.

Strengths: Problem solving; tenacity; marshaling resources; and team building.

Weaknesses: He could be patient when it is warranted; however, it did not come naturally to him.

Reference Notes

Roberto “Rob” Hernandez

**Dele Lowman – former Assistant to the County Manager, Fulton County, GA
(404) 612-8331**

Ms. Lowman worked with Mr. Hernandez in the Fulton County Manager’s Office. She had known him since 2003 where they worked together in Broward County. They had a good working relationship. He was very diligent and mission focused.

When Mr. Hernandez first arrived in the Administrative Office in Broward, she was working as a graduate being mentored by the County Administrator. She was told to watch Mr. Hernandez and learn from how he took a task, broke it into small parts, and organized people to get the job done. If there was something he did not know he studied to become more effective.

Mr. Hernandez and Ms. Lowman had philosophical differences yet got along quite well. His military background had shaped his personality and made him the driven person he was. He worked well with elected officials. He spent most of his time with the commissioner over the unincorporated areas. Though their interests were not always the same, they worked well together. He had the respect of the commissioners. Mr. Hernandez valued loyalty. His greatest strengths were diligence and following through. No matter how difficult a situation had become, he did what he needed to for the best interest of the community.

Laser focus was both strength and a weakness for Mr. Hernandez. In his current role as second in command, he did what he was asked without stepping back to see if there was another way. If he was the final decision maker, perhaps that would have been different. Unlike many managers, Mr. Hernandez did not have an aversion to staff meetings. He liked to speak with people face-to-face. He was more than capable of interacting via telephone and email, but he favored the personal approach when dealing with direct reports.

Mr. Hernandez was a great public speaker. He had a teaching background in the military. He interacted well with the public and dealt with residents often in the unincorporated area.

One task Mr. Hernandez was asked to take on was building the first amphitheater on the south side of the county. It was an overwhelming project with an unreasonable timeline and difficult budget. He did an outstanding job and followed it through to opening day.

There are certain people Ms. Lowman has worked with that she would hand pick to be on her team and Mr. Hernandez is one of them. She highly recommends hiring him.

Words or phrases used to describe Roberto Hernandez:

- Focused,
- Reliable,
- Diligent,
- You can trust him to do what he says,
- Professional and,
- Hard working.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Diligence; follow through; loyalty.

Weaknesses: Laser focus, however he might step back if he were the manager.

Bill Durrence – former Alderman, City of Savannah, GA 912-247-8108

Mr. Durrence worked with Mr. Hernandez between 2016 and 2019. At the time, Mr. Durrence was in his first term as Alderman. Mr. Durrence was one of the Savannah City Councilmembers who hired Mr. Hernandez to be City Manager. Mr. Durrence was one of Mr. Hernandez’s directors.

Mr. Hernandez possessed an impressive and thorough understanding of the City. He had extensive knowledge from public works to finance. He was as open as possible with councilmembers. Even though working for nine directors made things complicated, Mr. Hernandez was exceptionally competent and provided numerous innovative ideas. He was good internally and developed good staff relationships. He accomplished tasks in a timely manner. He was highly skilled in running the City.

Mr. Hernandez offered many solutions to the City’s issues. He helped councilmembers understand the reason for the City’s problematic budget stresses. Although the City was a successful destination for tourism, very little of that money went to the City’s coffers. Certainly, some sales tax revenue came to the City, but most went to businesses involved with tourism. Mr. Hernandez clearly identified the City’s financial stress points.

As good as he was with finances, Mr. Hernandez struggled to maintain public posture as Savannah City Manager. First, he underappreciated the historical nature and character of the City that brought much community pride. Because historic landmarks and districts made the City different, many people expected solutions to be likewise unique. Local attitude often discouraged researching how other places solved similar problems. Mr. Hernandez’s approach to look at other cities’ solutions made people feel slighted. As such, he missed an opportunity to engage early and gain the public’s support. Second, he was generally more of a hands-on manager who seemed uncomfortable interacting in social management of a highly networked City. He was more comfortable rolling up his sleeves and working than being a public face for the City. Because he did not engage people to his side, he was less effective than he could have been.

Mr. Hernandez generally made good decisions. He also hired well for many top staff members, including the Fire Chief, Police Chief, and Human Resources Director. He often reached out to other senior staff when looking for personnel, and this collaborative approach was helpful. Some personnel he inherited were not highly qualified for their positions. At one point, Mr. Hernandez successfully moved senior personnel to fill vacancies. Prior to this major shuffle, staff members were scattered all over the City, causing much unnecessary work. He consolidated staff, thus making processes more efficient. Occasionally, Mr. Hernandez needed to be more disciplinary, but he eventually let a number of problematic people go. For example, he fired the Director of the Department of Revenue because she was simply unable to fix a particular issue, even after being given adequate time and resources.

Reference Notes

Roberto “Rob” Hernandez

Mr. Durrence is unaware of anything in Mr. Hernandez’s background or conduct that will concern a future employer. If given the opportunity, Mr. Durrence would rehire Mr. Hernandez. Being new to a large leadership position as Alderman, Mr. Durrence understands the learning curve Mr. Hernandez faced while being City Manager for the first time. Mr. Hernandez was a bright individual who experienced valuable lessons. He was a good Manager.

Words or phrases used to describe Rob Hernandez:

- Knowledgeable,
- Competent,
- Introvert,
- First rate manager,
- Innovative, and
- Open.

Strengths: Financial skills, extensive understanding of how to run a city, executive functioning.

Weaknesses: He did not fully appreciate the City of Savannah’s uniqueness and had a hard time connecting with the City’s people.

William “Bill” Hubbard – Chief Executive Officer, Savannah Area Chamber of Commerce, GA 912-657-9207

Mr. Hubbard and Mr. Hernandez interacted when Mr. Hernandez was the Savannah City Manager between 2016 and 2019. They have since messaged each other occasionally.

When Mr. Hernandez worked in the City, he communicated fairly regularly with Mr. Hubbard. Mr. Hernandez called and sent emails. He sometimes dropped by Mr. Hubbard’s office, and they typically saw each other weekly during city events.

Mr. Hernandez was a decent City Manager. Mr. Hernandez was a good, smart man. He was quite professional and thoughtful. He had good financial grounding. He built good staff around him and organized them well. He generally made good decisions. He also did a great job with reorganizing the city staff. At times, though, Mr. Hernandez made some poor staffing decisions. For example, he left an engineer in a developmental position a bit longer than others might have preferred. Additionally, he let go an assistant city manager by leaving a note on her chair. Although several elected officials asked him to let her go, this approach was unprofessional.

Mr. Hernandez faced difficulties integrating himself in the community. As a first time city manager, Mr. Hernandez was not accustomed to being one of the City’s key leaders. He wanted to ensure others did not accuse him of playing favorites. As such, he interacted with the philanthropic, nonprofit, church, and business communities on a purely business level. He experienced difficulty developing tough enough skin to deal with criticism. This weakness held him back and

Reference Notes

Roberto “Rob” Hernandez

undermined his ability to be effective. Despite his strengths as City Manager, his inability to fully participate in the community affected the public’s confidence in him. He needed to get to know these smaller communities better.

Mr. Hernandez was a good manager who oversaw processes behind a desk. He had great management skills and good knowledge of running a city. He thoroughly researched various solutions and made decisions effectively. For example, he led a team in providing a strategic plan in a fairly short time period. He worked with elected officials to agree to this plan.

Unfortunately, Mr. Hernandez had challenges working through the politics to implement the strategic plan. In one instance, Mr. Hernandez proposed a fire fee to help city finances. Around this time, the City had collected approximately \$10 million in revenue. While garnering public support for the fire fee, Mr. Hernandez was also especially transparent with this revenue. Because the public misunderstood how the revenue was not part of the City’s own earnings, people were particularly upset with the fee. Mr. Hernandez had admirable intentions to be transparent, but his timing cost him the fire fee concept.

Despite these challenges, he was always polite and diplomatic with people. Even when church groups angrily protested and wanted him fired, he kept going. He handled stress well for the most part and never showed a temper. Eventually, however, Mr. Hernandez and his wife left the City because they felt alone.

Mr. Hubbard is unaware of anything in Mr. Hernandez’s professional or personal conduct that will concern a future employer. Mr. Hernandez had been purely professional, honest, and transparent. Although Mr. Hubbard would not rehire Mr. Hernandez to be City Manager, Mr. Hubbard would consider Mr. Hernandez for an Assistant Manager position. Mr. Hernandez was strategic and smart. He would excel in the responsibilities expected of a Deputy Manager.

Words or phrases used to describe Rob Hernandez:

- Professional,
- Good guy,
- Quite thoughtful,
- Polite,
- Diplomatic, and
- Capable.

Strengths: Financial skills, building good staff.

Weaknesses: He was politically weak and often distant from constituents.

John Hearn – City Attorney, Coral Springs, FL 954-344-1011

Mr. Hearn has known Mr. Hernandez since 2011. In terms of job performance, Mr. Hernandez was very energetic and a go-getter. He really moved projects along and stayed on top of them. He was a change agent.

Reference Notes

Roberto “Rob” Hernandez

City Hall was in an office that was built by General Electric for selling homes. The City had been trying to build a City Hall since 1993. Mr. Hernandez really energized those involved, and the new City Hall was finally under construction.

Mr. Hernandez was always very involved in the community, and he attended community meetings. He had a very good relationship with the public. He was customer service oriented.

Mr. Hernandez led staff to fulfill the vision of the Board. Employees did not have much appetite for moving forward with the downtown development, which included the new City Hall. He took the bull by the horns and made a very detailed PowerPoint presentation showing all the issues that their current City Hall had. He demonstrated how having a vibrant downtown area would benefit the City and residents. He did a nice job leading the project.

Mr. Hearn was not directly involved with the budget and finances, but in the course of their conversations he came to believe that Mr. Hernandez had good financial skills. Mr. Hernandez completed tasks by the deadline given.

Mr. Hernandez had not been involved in anything personally or professionally controversial. He left Fulton County because his family wanted to return to Florida. When an opportunity opened up on Broward County, he embraced it. He moved forward when doing so made sense.

Mr. Hearn would hire Mr. Hernandez and had a positive experience working with him. Mr. Hernandez would be a good City or County Manager. The five Commissioners and City Manager in Coral Springs loved working with Mr. Hernandez.

Words or phrases used to describe Roberto Hernandez:

- Energetic,
- Outgoing,
- Positive,
- Change agent,
- Engaged, and
- Active.

Strengths: Energetic; very much wanted to make decisions; could shepherd a project from A to Z very well.

Weaknesses: People’s greatest strengths are often their greatest weaknesses. Because he moves projects along so well, Mr. Hearn had to slow him down a little and occasionally reminded Mr. Hernandez of a step that needed to be taken in the process.

Prepared by: Danielle Dayton and Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

WLRN News HD1 (FL)
February 21, 2020

Fort Lauderdale Officials Respond to \$1.8 Million State Fine for Sewage Spills

Author: *Alexander Gonzalez & Tom Hudson*

Pipes in Fort Lauderdale keep breaking--it's been an almost daily reality for many people living and working in the city. More than 200 million gallons of sewage have spilled from busted pipes in Fort Lauderdale since December. The state responded to the sewer spills this week. The Florida Department of Environmental Protection fined the city almost two million dollars. That amount is based in part on how much sewage has spilled. On the South Florida Roundup, host Tom Hudson talked about the issue with WLRN's Broward County reporter Caitie Switalski and Fort Lauderdale's deputy city manager **Rob Hernandez**.

Here's an excerpt of their conversation: Tom Hudson: What are the funding options if the city has to pay the state this \$1.8 million fine or any fine for that matter?

Rob Hernandez: Well, if we have to pay the fine, it's either going to have to come out of the Water and Sewer fund or the city's general fund. And again, we believe that \$1.8 million will best serve our local residents and our taxpayers by being reinvested into some of these projects rather than just going in and being deposited into a general fund at the state level. We're not being critical of the state. We understand that they were in the position where they felt that they had to take some sort of action. But we're hopeful that we'll be able to work something out that is slightly different than just the fine.

Caitie Switalski: When it comes to the punitive nature of the fine, \$1.4 million of the \$1.8 million is civil penalties based on how much sewage and how many days the sewage spill went on. I know the city is in the middle of weaning off trying to take money out of those funds [general or Water and Sewer funds] to balance the regular budget. That was a practice leftover from the last city administration. But if the city has to pay part of this fine out of those funds again, have you heard from any residents about that?

Hernandez: No, we haven't heard from any residents. And certainly I don't think it's going to change the practice. The city commission has made it abundantly clear that we were going to transition away from transferring funds from the Water and Sewer fund into the general fund. The city commission that's currently in office directed the city manager to transition us over a four-year period. They have since directed us to accelerate that transition. And that's something, going into next fiscal year, that we're certainly looking at. If there's an opportunity to return those funds at midyear this year, that's something that our city manager is looking at. But I don't think that the fine is going to derail us from making progress. And using your word, "weaning" ourselves off of that budget transfer. We're under clear direction that the funds that are generated by the Water and Sewer fund are going to go back into the necessary improvements that need to be made. And certainly we've been working in that direction for the last couple of years and we will continue to do so.

South Florida Sun Sentinel (FL)
July 23, 2019

Fort Lauderdale: Contractor Who Broke Water Main Wasn't Digging Where it told us

Author: *Larry Barszewski*

Fort Lauderdale never warned a contractor that a critical water line lay buried where workers planned to dig last week, a report shows, but city officials say that's because the contractor supplied the wrong address. The misinformation led to a failure that ultimately dried up the city's water supply and led to days of boil-water orders. Taps ran dry hours after the contractor drilled into the water supply line July 17. Countless businesses were forced to close, and more than 200,000 people were left without water to drink or shower. The contractor, Florida Communication Concepts, used a service called Sunshine 811 to find out whether there were underground utilities it had to watch out for while doing work for Florida Power & Light Co. The statewide utility service is authorized under Florida law and is the state's official resource for companies and individuals planning underground work.

The report shows Fort Lauderdale never told the contractor that the site in the back of 2525 NW 55th Court contained a 42-inch pipe that supplied raw water to the main water treatment plant. Instead, the city indicated that it didn't provide service there, according to the report from Sunshine 811. Deputy City Manager **Rob Hernandez** said the city's water line isn't on that property; it's 75 feet north. The digging was being done to the north and east of the requested location, he said. "It appears that where the contractor was digging is not where they indicated on the 811 ticket," **Hernandez** said. "Our investigation is still ongoing." The owner of Florida Communication Concepts, Tim Hicks, said he couldn't comment, and FPL has declined to answer reporters' questions.

Contractors contact Sunshine 811 to alert agencies about the work they plan to do and to find out whether there are pipes or underground facilities they need to avoid when digging. The service then alerts the utilities, which are supposed to inform the contractor whether they have lines in the area and mark them if they do. Florida Communication Concepts filed a ticket with Sunshine 811 on June 25 to install conduit in July for FPL near Fort Lauderdale Executive Airport, records show. Sunshine 811 notified Fort Lauderdale and nine other entities, based on maps they submitted to Sunshine 811 that indicated it was possible they could have equipment near the work site. Tamarac and Crown Castle Fiber responded that they had no facilities there. Oakland Park, Teco People's Gas of South Florida and CenturyLink said their lines were outside of the work site.

Others said they did have equipment in the area. Fort Lauderdale Executive Airport, Comcast Cable, AT&T and FPL indicated that they marked the locations of their lines for the contractor. Fort Lauderdale responded as well, but it used a code indicating that no city utilities were present at that excavation site. The code it used said "another company provides the services at this location." That code typically is used by utilities that do not have services at that exact location, according to Sunshine 811's online site. **Hernandez** said that's because the city doesn't have any water lines at the property address the contractor listed. He also said Florida Communication

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Concepts said on its Sunshine 811 form that it would not be doing boring, but that's how the city's pipe was pierced. Fort Lauderdale receives dozens of requests each day from Sunshine 811 for underground line information. Sunshine 811 sent the city 20,501 notices last year and 12,635 so far this year, the service reported. The requests go to the city's distribution and collections chief for its water and wastewater services. A city police report filed at the time the line was punctured said the company had used the line-locating service. However, it cited Florida Communication Concepts for not having a permit for the work, violating city codes. It issued the contractor a "Notice to Appear" citation. City officials said a date has not been set for a hearing. It's not clear whether a permit was needed. **Hernandez** said last week that FPL has a franchise agreement with the city that does not require the utility to get a permit every time it digs.

Post Gazette (PA)
July 19, 2019

Fort Lauderdale gets 'Temporary Relief' While Crews Repair a Water Main Break

Author: *Dakin Andone & Emanuella Grinberg*

Officials in Fort Lauderdale, Florida, said a temporary fix water has running again after a main break left an estimated 220,000 customers without service Thursday. Water is flowing below normal pressure and is expected to return to "near normal" sometime Thursday night, Mayor Dean Trantalis said in an evening news conference. A subcontractor repairing electric lines on Wednesday struck a pipe that supplies water to a treatment plant, cutting off the city's water supply. No major incidents were reported as a result of the outage, the mayor said. A partial patch was placed on the hole, increasing water pressure, Mr. Trantalis said. Those involved in the repairs are "confident" that the patch will provide "temporary relief" while crews work to redirect the water flow through a backup line and replace the broken pipe, he said.

The installation could take through the weekend, Mr. Trantalis said. While repairs are underway, a boil water advisory is in effect until and water distribution sites will stay open until at least Saturday, Mr. Trantalis said. With repairs underway, he said the city's focus will shift to investigating the cause and seeking compensation for not only the city but hotels, restaurants and other businesses impacted by the service outage. "This was not just a minor incident, this impacted many hundreds of thousands of hundreds of people," Mr. Trantalis said. "It was clearly haphazard," he said. "It's clearly something that we're going to seek retribution for."

What the city is doing to fix the pipe

On Wednesday, a subcontractor working near the city's Executive Airport for Florida Power & Light damaged a 42-inch city pipe that supplies water from wellfields to the Fiveash Water Treatment Plant, the mayor said. The service outage impacted the city and surrounding municipalities that receive water through the city, including Lauderdale-by-the-Sea, Oakland Park, Wilton Manors and sections of Davie and Tamarac. An estimated 220,000 customers were impacted, Deputy City Manager **Rob Hernandez**. Crews are now building a concrete bunker around the broken pipe to seal the break and protect the pipe, Mr. Trantalis said. The bunker should be completed by 10 p.m. ET and the Fiveash Water Treatment Plant should be back to full and normal operation, he said. The temporary fix will give crews time to redirect the water flow through a backup line, Mr. Trantalis said. Once the backup line is in place, a replacement pipe for the primary main will be installed, likely over the course of the weekend, the mayor said.

Cause of outage under investigation

Earlier Thursday, Mr. Trantalis said crews responded immediately, but as they were working, the damaged pipe collapsed, forcing the city to turn off the water flow. During Thursday night's news conference, he suggested the subcontractor bore the brunt of the blame for "something they should not have done." The subcontractor has been cited and an enforcement action has been launched, the mayor said, although he was unable to identify the specific citation. When initially asked if there was anything the city could have done better, the mayor responded "no," then

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added, "Yes -- we could have foreseen this but you can't foresee these types of things." Later in the press conference, the mayor maintained the incident an "accident" caused by "human error," but he also acknowledged that it put a spotlight on the city's redundancy systems.

Deputy City Manager **Rob Hernandez** said "difficulty" with at least one valve that was supposed to redirect water to the redundant system, leaving them unable to isolate the damaged section of pipe. "What [this] pointed out to us is that we need to pay more attention to our infrastructure needs and that we need to go back and make sure that these redundancies systems do work when they're supposed to work." Residents in need of bottled water can find it at the Beach Community Center on 33rd Avenue, Mills Pond Park on Northwest 9th Avenue and Riverland Park on Southwest 27th Avenue.

SavannahNow

Posted May 26, 2019 at 8:18 PM Updated May 27, 2019 at 12:29 AM

Savannah's city manager out on medical leave

By DeAnn Komanecky and Eric Curl

Savannah City Manager **Rob Hernandez** is out on medical leave, with Patrick Monahan now serving as acting city manager. **Hernandez** tendered his resignation on April 12 with a last work day date of June 30. Whether **Hernandez**'s medical leave will change when he leaves his post is not known. City spokesperson Ken Slats said no other details are currently available. Monahan, a former Chatham County assistant manager, was hired in April as a consultant to work with **Hernandez**, starting in May. Monahan retired from the county in 2013 and has said he would only take the interim position temporarily, but is willing to stay long enough after this fall's election for the new city council to hire the long-term manager next year. He will be paid \$20,000 a month for up to 12 months, under the agreement.

Hernandez's resignation came after news broke of his pending departure for a job as deputy city manager of Fort Lauderdale, Florida. **Hernandez** declined interview requests regarding his resignation, but said in a subsequent press release that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. He indicated there was more to the decision than just family reasons, however, in correspondence obtained by the Savannah Morning News. **Hernandez** said he intended to stay away from city manager positions for a while after being asked about his plans by Lake Wales, Florida, City Manager Kenneth Fields. "The last three years here have been tough as a (city manager)," **Hernandez** said. He responded in a similar manner to an April 12 email from Chatham County Engineer Leon Davenport. "Tough town," **Hernandez** said. "Going back to Fort Lauderdale."

The city council hired **Hernandez** as city manager Sept. 1, 2016, with a \$238,000 salary and \$600 monthly vehicle allowance, as well as a \$7,000 annual 457 retirement plan. After his arrival, **Hernandez** led the city through a major restructuring and successful development of a strategic plan. The city has also experienced two years of budget surpluses after **Hernandez** had implemented a hiring freeze and budget cuts. His impact was praised by some of his executive team following word of his departure.

City Management Coordinator Joe Shearouse Jr. wrote in response to his resignation notice that he thought a lot about the accomplishments **Hernandez** had made in Savannah. "Your impact on people is extensive and much more influential than a project or initiative," Shearouse said. "Your openness and eagerness to provide us opportunities to grow and learn is lasting and far reaching." Special Projects Coordinator Daphne Williams said in an email that it may be a long time before they get someone else comparable. "Our team was on fire," Williams said.

Hernandez also experienced his share of criticism, which began shortly after his arrival when he proposed cuts, which were ultimately restored, to arts organizations and social programs. And he was widely panned by residents following the implementation of a fee for fire service.

Hernandez had touted as a way to get all property owners — including those that are tax-exempt

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Roberto Hernandez
(Articles are in reverse chronological order)

— to contribute to the rising costs of providing fire protection. Public indignation only grew when **Hernandez** presented the council with a spending plan for a budget surplus from 2017 of more than \$10 million about five months after the fee was adopted. The fee was ultimately repealed, but **Hernandez** later attributed some subsequent job searches to the widespread opposition he encountered following its implementation.

Savannah Morning News (GA)
April 29, 2019

Savannah Could Get More Affordable Housing Under These Proposed City Programs

Author: *Eric Curl*

About 44 percent of Savannah families cannot afford quality housing, according to city officials. In other words, almost 24,000 local households are cost burdened because they spend 30 percent or more of their income on housing, said Housing and Neighborhood Services Director Martin Fretty. To address the issue, the city is considering some new affordable housing initiatives that were presented to the Savannah City Council during a workshop Thursday. The initiatives include a \$20 million investment to acquire, redevelop and sell 1,000 blighted properties over a 10-year period. The investment would provide more affordable housing, while also reducing the number of abandoned properties that cost the city an average about \$1,300 a year each in lost tax revenue and expenses related to police, fire and code enforcement services, Fretty said. The city is hoping to get \$10 million for the acquisition program included on the Special Purpose Local Option Sales Tax referendum going before voters this fall. The eventual sale of the properties would go back into a revolving fund and help drive down costs for future investments, Fretty said. "After a couple of years you ought to be able to recover, we think, 80 percent of what we invested in the properties to acquire them," he said. The city is expected to meet with Chatham County officials next month to discuss the SPLOST project list and determine Savannah's distribution share of the sales-tax revenue. Savannah affordable housing presentation by savannahnow.com on Scribd. Inclusionary zoning. The city is also contemplating the implementation of an inclusionary zoning policy, similar to one established in Atlanta last year. The policy would require developers of apartment projects to include a certain percentage of affordable units or pay a one-time fee into a city housing fund. In turn, the developer could select from a list of incentives that could allow for more units, reduced parking requirements and a streamlined permitting process. In Atlanta the program applies to areas where the city is experiencing the pressures of redevelopment, said Bridget Lidy, Savannah's director of planning and urban design. In Savannah, the Canal District, where the new arena is being built west of downtown, provides an opportunity for the program's launch, Lidy said. "It's ripe for this," she said. The proposal received general support from the council, although it is still early in the process. Lidy was encouraged to set up a meeting with Atlanta officials, who she said have expressed interest in helping Savannah establish their own initiative.

And City Manager **Rob Hernandez** said he thought the city would likely need to hire an outside consultant before they could develop an inclusionary zoning policy. "I think we need to bring in the resources from other communities that have gone through that process," **Hernandez** said. "We haven't and there is a lot of stakeholder involvement and a lot of legalities involved." In the meantime, the city has developed some proposed standards to reduce development costs and increase the amount of affordable housing, including the reduction of the minimum lot size and parking requirements in traditional neighborhoods. In addition, the city's proposed new zoning ordinance, NewZo, provides more flexibility for constructing accessory dwelling units, with no more than one bedroom, in some areas. City officials are planning for the new ordinance to be adopted in July after public hearings are held in June.

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(Articles are in reverse chronological order)

Savannah Morning News (GA)
April 13, 2019

Hernandez Formally Resigns Post

Author: *Savannah Morning News*

Savannah City Manager **Rob Hernandez** formally submitted his resignation letter Friday morning. "Such letters are never easy to write and I hope it conveys my appreciation to all of you and our great staff, especially those that sit around the table with me each Monday," **Hernandez** wrote in an email to the city council and city staff. "I know that I've made some mistakes along the way as I am far from perfect. Please know that I have always attempted to do what is in the best interest of the city in the long term, and endeavored to create a culture of fairness, professionalism, integrity, inclusion, diversity, opportunity and ingenuity. I'm fortunate to have been surrounded by a team of good people. I'm grateful to have known you. Together, we've gotten a lot done since October 11, 2016. I hope that I have served all of you well," he wrote. "Thank you for the opportunity to serve as your city manager."

Fort Lauderdale City Manager Chris Lagerbloom informed the Savannah Morning News on Thursday that **Hernandez** will be joining the city as deputy city manager later this summer. In a formal resignation letter addressed to the mayor and alderman, **Hernandez** touted the team's accomplishments, from upgrading the city's bond rating to launching the design of the new arena. "I have been honored with the privilege of serving as Savannah's eighth city manager since adoption of the council-manager form of government in 1951. I joined the City on the heels of Hurricane Matthew on October 11, 2016, and since then we've weathered literal and figurative storms and overcame numerous obstacles in providing exceptional municipal services," **Hernandez** wrote. "We accomplished much during this time while simultaneously creating an organizational spirit focused on one simple concept: Forward. Forward is a fanatical passion for momentum, progress and achievement. It is an obsession with what is possible rather than the status quo. It is the driver behind our biggest accomplishment - SAVANNAH FORWARD, our guide to strategic policy-making and investments through 2025."

Hernandez said in a press statement issued later that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. His resignation is effective June 30. Savannah Mayor Eddie DeLoach has recommended that former assistant Chatham County Manager Pat Monahan serve as interim city manager, but he is awaiting support for that decision from the rest of the city council. A special meeting has been called for 6 p.m. Monday in the Media Room on the second floor of City Hall for the council to consider an interim city manager. The next city manager is not expected to be hired until after the new city council is sworn in next year following this fall's election.

Savannah Morning News (GA)
January 9, 2019

Savannah City Manager Rob Hernandez: Government Leadership Backs Savannah Fire Department

Author: ***Rob Hernandez***

There has been much discussion in recent days about staffing levels within Savannah's Fire Department. I would like to take this opportunity to address misinformation circulating in social and regular media outlets.

First, what the city government has not done:

- We have not closed any fire stations.
- We have not laid off any fire personnel.
- We have not left any neighborhood in Savannah unprotected.
- We have not taken steps that will delay Savannah Fire's response time to an emergency.

What we have done is eliminate vacant positions in Savannah Fire over the past two years. To put those reductions in context, I would like to take you back to 2014. For the first time that year, Savannah Fire was granted an ISO Class 1 rating — an insurance classification that evaluates a community's fire operations and water infrastructure. Less than 1 percent of fire departments in the nation are rated Class 1. The following year, in 2015, Savannah received a three-year, \$3.5 million FEMA grant designed to increase staffing levels in Savannah Fire. We did just that. In 2015, we added 15 firefighter positions. In 2016, we added another 15 firefighter positions. And in 2017, we grew by 10 more firefighter positions. Add it all up and over a three-year period we added 40 new firefighters to our payroll — a 12.6 percent staffing increase. At 366 total positions, including 341 firefighters, this was the highest staffing level in Savannah Fire's history.

That grant ended in 2017, and with it we faced a difficult decision: Do we ask Savannah taxpayers to continue funding this increased staffing level, or do we make reductions? We were facing flat revenues that year, and direction from city council to continue making investments in the police department. To balance the 2018 budget, we eliminated 45 vacant positions across the city government organization, including 18 within Savannah Fire. Council directed that those cuts come from Engine 16/Marine 1 — a specialized unit that operates the fire boat and a backup pumper truck at fire department headquarters on Oglethorpe Avenue. That same budget authorized a permanent funding solution for fire operations: the fire fee. That fee was rejected over the summer, and during months of public discussion we heard repeatedly from property owners that they preferred a smaller fire department over paying a new fee to fund fire services.

We contracted with the University of Georgia Carl Vinson Institute of Government to analyze Savannah Fire operations and make recommendations on better use of resources. I expect those recommendations within the month, but preliminary discussions with the report authors identified options for increased efficiency and reducing costs. The 2019 budget was balanced with the elimination of another 15 vacant positions. The UGA recommendations will drive where

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those reductions are made. It is important to note that even with the elimination of these 33 vacancies over the past two years, Savannah still has seven more firefighter positions today than we did in 2014, when we received our ISO-1 rating. And we are still well-staffed compared with communities our size; Charleston, for instance, has one fewer firefighter position than Savannah, and 24 percent more territory to cover.

As a resident or business owner in this city, you are served not just by the fire station located in your neighborhood, but a fire protection system consisting of 15 stations and 22 emergency response vehicles. The city government also maintains agreements with our adjacent cities, which provide us access to more than 20 other fire stations, firefighters, and equipment should they be needed in the unlikely event all of our resources are unavailable. No area of the city will ever be left without a response to a fire. We are fortunate to have one of the best fire departments in the nation. Savannah Fire will continue to be, even with these adjustments.

Rob Hernandez is Savannah's city government manager.

WTOC 11

April 9, 2019 at 11:21 PM EDT - Updated April 11 at 10:36 AM

City of Fort Lauderdale extends offer to Savannah city manager

By Sean Evans

SAVANNAH, GA (WTOC) - Several sources have confirmed that Savannah City Manager **Rob Hernandez** is leaving his job. "The city is losing a very smart and talented individual," Savannah Alderman John Hall said. "I wish Mr. **Hernandez** the best wherever he goes. Our loss is another city's gain." **Hernandez** said that he has not officially tendered his resignation or discussed this with all of city council as a group. He said he will not release a statement until he felt it was the appropriate time. We've reached out to the mayor's office and the city spokesperson for comment.

Hernandez came to Savannah from Broward County, FL in 2016. "He inherited a virtual mess. Remember, he came in in the middle of a hurricane. The first hurricane we'd had in what, 27 years," said District 4 Alderman, Julian Miller. In addition to dealing with the aftermath of Hurricane Matthew, **Hernandez** was tasked with completing a budget and coming up with a blueprint that would carry Savannah years into the future. "He has come up with the city's first strategic plan and gotten it going. He has refined our logo so we have the same logo everywhere. There's an awful lot he has done, most of which the public will never see," Alderman Miller said. Several things spear-headed by **Hernandez** have been very public, like re-establishing a Savannah Police Department after the de-merger with the county, the search for a new police chief, and the fire fee proposal.

Less than a year after the fire fee proposal was dropped by city council after public backlash, **Hernandez** referenced it in a moment of levity during his speech at a firefighter award ceremony Wednesday afternoon. "Believe it or not, the city actually imposed a fire fee way back in the early 1800's to provide fire protection services to all property owners of the city. I wish I would've known that a year-and-a-half ago. That could have helped us sell what we were trying to do a little easier to those that were opposed to what we were trying to do," he said.

If **Hernandez** is in fact out the door like sources tell us, city leaders know they need a similar leader to take the helm. "When you run a city, there are so many moving wheels and so many gears going in different directions. There's always going to be hundreds of things that have to be addressed. That's why it's going to take someone who really knows what they're doing to pick up the mantle and go forward," Miller said.

Hernandez's previous attempts to change jobs have been publicized. In August of 2018, it was announced that **Hernandez** did not get a county administrator position in Pinellas County, FL. The city of Savannah confirmed he was a finalist for the position. **Hernandez** was also on the shortlist for a city manager position in Brownsville, TX. At the time, **Hernandez** said he wasn't sure if the Savannah community wanted to work with him. "Criticism of government is healthy and important, and comes with the territory," he said in a statement in August of 2018. "I don't take it personally, even if some of the attacks on me have been very personal. What I do want is

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to work in a community that wants to work with me. I am not sure that is currently the case. Amid a sustained level of criticism and uncertainty, I have considered opportunities outside Savannah. While I have no desire to leave, I did feel it was a prudent move for me and my family.” **Hernandez** was a key architect of a proposed fire fee in Savannah that drew the ire of many in the city. The city council withdrew the fee from consideration after a tortured fine-tuning process. The mayor proposed to halve the fee weeks before it was withdrew.

Chaz Adams with the city’s strategic communications office says **Hernandez** has received an offer as Deputy City Manager for the City of Fort Lauderdale Florida. “The City of Fort Lauderdale has extended an offer to Roberto “Rob” **Hernandez** for the position of Deputy City Manager. The offer is contingent upon approval from the Fort Lauderdale City Commission. The commission plans to consider the item at their next meeting, which will take place on Tuesday, April 16,” Adams said. City council will hold its regularly scheduled meeting on Thursday. We’ll be following this closely to see if anything is announced regarding a resignation, as well as what’s next if the Savannah city manager position becomes vacant.

Savannah Morning News (GA)
December 20, 2018

Savannah City Council Oks \$1M Fire Station Sale Despite Buyer's History of Code Violations

Author: *Eric Curl*

The Savannah City Council on Thursday approved the sale of a former fire station, despite the buyer's history of being cited for code and maintenance violations at multiple properties throughout downtown. The \$1.05 million sale to Inman Park Properties came after three proposals were submitted to the city and evaluated by a five-person staff committee. Inman received the highest score after proposing to preserve and restore the 72-year-old building at 6 W. Henry St. for use as a cafe and office space. Rajesh Patel had proposed paying \$525,000 for the property, while Lynch Associates Architects offered \$455,000. The sale was quickly approved without discussion by the city council, with the exception of Alderman Bill Durrence, who had stepped out of the chambers to speak with someone who was leaving.

Durrence, who represents the area where the building is located, said he probably would have voted for the sale also. It was his understanding that most of the property maintenance issues have been addressed and he was hoping to see something done with the building, Durrence said. "The bottom line for me is that it didn't matter how I voted because the majority of council made up their mind that for that price point, they were going to sell it," he said. Inman's proposal is expected to activate the "somewhat stagnant" block and generate 75 full-time jobs in the neighborhood, according to the developer's proposal. Inman reported that construction was expected to begin 120 days after closing and take one year to complete.

Staff had delayed consideration of the sale in October following inquiries from the Savannah Morning News into the buyer's past code and property maintenance issues. From 2012 through 2016, the city instigated 16 Chatham County Recorder's Court cases against Inman's owner, Jeff Notrica, for 14 downtown properties. Charges related to overgrown vegetation, maintaining a clean and sanitary property, safety, defacement of property, accumulation of garbage, and an unsafe building. The pending sale comes after the approved sale this year of multiple downtown city properties. City Manager **Rob Hernandez** has touted the sales as a way to return outdated properties to the tax rolls and raise revenue for the construction of a new municipal center west of the Historic District, where the city is building a new arena.

However, **Hernandez** said during an interview Tuesday that the sales revenue may instead go toward construction of the arena. The amount of current voter-approved Special Purpose Local Option Sales Tax is expected to raise \$120 million, while about \$22 million was raised during previous tax periods. Still, the city expects to need an additional \$20 million to \$40 million to cover the estimated \$140 million to \$160 million costs of the arena's construction, as well as relocating public works from the arena site and building a new complex for that department, **Hernandez** said. The city does not plan on adding the arena to the next SPLOST referendum going before voters this fall, he said.

Savannah Morning News (GA)
November 16, 2018

Savannah Proposing Slight Property Tax Cut, Employee Wage Hike

Author: *Eric Curl*

The owner of a home valued at \$100,000 will save about \$8 a year under a proposal to reduce the property tax rate in 2019, according to city estimates. The reduction from 13.40 mills to 13.20 mills was requested by the Savannah City Council on Friday, the second day of a two-day budget retreat, after staff had initially proposed retaining the existing rate. Alderman Brian Foster advocated for the reduction to provide some relief to taxpayers after the rate was increased from 12.48 mills this year following the elimination of the widely opposed fire fee. "It's a start," Foster said. The council also directed staff to incorporate a 3.5 percent wage increase for employees next year. The proposed increase was agreed to as a compromise after Alderman Van Johnson had initially sought to bump staff's recommended 3 percent wage increase to 4 percent. "The fight for the best and the brightest is real and people ultimately go where they will be paid," Johnson said.

To maintain a balanced budget, while accommodating the council's wishes, staff said they increased their "conservative" projections for property tax revenue growth next year from 3 percent to 4 percent. In addition, staff plans to cut another \$1 million from the proposed budget to cover the remaining costs, said City Manager **Rob Hernandez**. The 2019 budget is expected to be presented to the city council for adoption next month. Since **Hernandez** arrived in late 2016, he has touted the need to address what he described as a structural imbalance resulting from expenses exceeding revenue. The fire fee adopted this year was an attempt to address that imbalance, but the council voted to repeal that new revenue source after facing widespread opposition from property owners.

Hernandez said he believes the city has made progress, but noted the concerns raised by the council during the retreat that funding was lacking for infrastructure and service improvements. "We're still imbalanced in that this budget is not able to adequately address those needs," he said. "We are addressing them, but the need really outstrips our ability to fund them." The next Special Purpose Local Option Sales Tax, which goes before voters next fall, has been touted by the council and staff as a way to fund needed infrastructure improvements, but **Hernandez** said the city cannot rely on the tax to resolve the issue. The city will also be looking at more models to fund municipal services, including a potential stormwater fee to cover the cost of drainage projects, **Hernandez** said. In July 2017, the city council unanimously approved a \$49,651 contract with Atlanta-based Stantec Consulting Services to study the feasibility of such a fee and how it would be implemented, but the study's findings have never been presented. "We continue to look at that and we will be bringing that back to City Council at the appropriate time," **Hernandez** said.

Savannah Morning News (GA)
August 31, 2018

\$3.9M Mistake Mucks Up Arena Contract

Author: *Eric Curl*

The Savannah City Council on Thursday delayed by two weeks consideration of an \$11.2 million contract with AECOM Hunt to manage the construction of the new \$140 million arena, after learning the contract amount is actually about \$3.9 million more than city staff had initially reported. The vote for the delay came after staff explained during the morning workshop that a misreading of the fee proposal had led staff to initially report that the contract was \$7.3 million - the amount that was on the meeting agenda until Wednesday. The originally reported amount should have been a red flag since it was so much lower than the amounts submitted by the other two finalists for the contract, said Alderman Bill Durrence. Turner Construction had proposed serving as construction manager at a cost of about \$13.6 million, while JE Dunn's proposed cost amounted to almost \$12.7 million. "I'm very nervous," Durrence said. "I never spent \$140 million before." Pete Shonka, executive director of arena development, said that AECOM Hunt still had the lowest price and highest evaluation score after the error was corrected.

City Manager **Rob Hernandez** also said he felt confident in moving forward with the recommended contractor after determining the company had followed the process correctly, while acknowledging the error should not have occurred in the first place. "That reflects poorly on me and I apologize," **Hernandez** said. "We will double down to prevent circumstances like this in the future." Council members said they wanted more time to see how the error occurred before taking a vote. "The severity of it should not be lost," said Alderman Julian Miller. "We are going to be doing an awful lot of contracts and we need to have confidence on that." Walter Murphy, vice president at JE Dunn, had also spoken out against the contract being awarded to AECOM during the meeting and had informed the council that he had notified the city manager of the issue. "We were told it was a scrivener's error," Murphy said "I don't think so. I think the bid was non-responsive."

In other council news, city council approved the \$14 million sale of two downtown buildings. Mayor Eddie DeLoach joined Aldermen Carol Bell, Durrence, Brian Foster, John Hall and Miller in approving the sale of the historic Gamble Building next to City Hall for \$8.5 million, while Aldermen Van Johnson, Estella Shabazz and Tony Thomas cast the opposing votes. The buyer, Foram Development, plans to convert the building into a condo complex with rooftop gardens. Staff had recommended the sale as a way to rid itself of a building that requires extensive repairs and generate ongoing revenue by putting it back on the tax rolls. But Thomas said he disagreed with staff's assertion that the historic building was not adequate for city use. "I'm a little bit more of a sentimentalist," he said. "I believe the city is giving up its imprint on the riverfront."

The vote was similarly split with the council's approval of the sale of the former Catholic Diocese building at East Broad and Liberty streets for \$5.9 million to Standard Companies, which plans to develop the property as an apartment complex with commercial space. Johnson

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(Articles are in reverse chronological order)

said he was afraid residents were being priced out of living in the city. "This was in my mind a wonderful opportunity to provide affordable and workforce housing for people to live downtown," he said. The approved sales come two weeks after the city council's vote to sell the Broughton Municipal Building to Columbia Ventures for \$4.5 million. The buyer intends to convert the mid-century building into a hotel with retail on the ground level. And in April 2017 the council approved the \$5 million sale of a 1.2 acre lot on Oglethorpe Avenue, where a developer plans to construct a mixed-use residential complex.

Hernandez said the funding from the sales is being invested into a reserve account for a modern municipal center he is considering building west of downtown near the arena to consolidate city departments. The total costs of that project, which would include a public safety complex, have not been determined, **Hernandez** said. "We still have a lot of work to do on that," he said. "We still have to flesh that concept out with city council." In the meantime, the city has been relocating staff into 36,538 square feet of leased office space on Chatham Parkway at an annual cost of about \$785,000.

Savannah Morning News (GA)
July 11, 2018

City: Funding Problems not Over
Savannah May be Facing Tough Budget Process for 2019, Hernandez Warns
Author: *Eric Curl*

The recent repeal of the controversial fire fee may have been welcomed by property owners concerned about the additional expense, but city officials are not breathing easy as they look toward Savannah's financial future. With the elimination of the dedicated fee, which would have freed up millions in general funds, the city may be facing a difficult budget process for 2019, according to City Manager **Rob Hernandez**. **Hernandez** warned the Savannah City Council last week that their plan to increase the property tax rate by 0.92 mills, or 7.4 percent, will not resolve long-standing financial challenges that the fee was meant to help address. Almost a third of city parcels pay little or no property taxes due to being exempt or having low value, and tax digest growth has not kept pace with expenses, **Hernandez** said. "I don't want anyone leaving here today with a rosy picture of 2019's budget process," he said. "We are structurally imbalanced."

The mayor and aldermen are expected to adopt the tax increase on July 19 to restore almost \$10 million of the \$16.5 million in revenue lost with the elimination of the fire fee. The city also implemented a hiring freeze and cut expenses, including \$1 million Mayor Eddie DeLoach had sought for an early childhood learning center being planned by the Savannah-Chatham School Board. With the proposed tax increase, the city will be able to preserve funding for some priorities that included software upgrades, enhanced right of way maintenance, Waters Avenue streetscape improvements, increased city reserves, and the Savannah Shines neighborhood revitalization initiative that has already begun in Edgemere/Sackville, said Alderman Julian Miller. "I'm not sure if everyone understands how deplorable the city's computer system is," Miller said. "We're still running programs that most people have abandoned 20 years ago."

Alderman Brian Foster said the city will also maintain the full staffing levels of the police department after adding more than 120 officers to patrol the city following the department's split with Chatham County in February. "We are fully staffed and have been for a while in the first time in over a decade," Foster said. "That's what the public asked for and we have successfully done that." Savannah's property tax rate has been decreased or remained the same every year since 1994, aside from a six-month half-mill increase in 2010 that was dropped back to the previous rate the following year. The current rate of 12.48 mills has been in place since 2013. For the owner of a home with a fair market value of \$150,000, the proposed increase amounts to \$55.20 annually or \$4.60 per month.

Alderman Tony Thomas said that every effort would be made to reduce the rate in 2019, but **Hernandez** responded by casting doubt on that scenario. "I don't know at this point in time because it's still too early in the process for FY19 to determine, in fact, whether we are going to have a smooth budget process or we're going to have a rocky budget process like we've had the last couple years," **Hernandez** said. "So please do not leave here today thinking that budget

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(Articles are in reverse chronological order)

process for FY19 is going to be a smooth one because I can't guarantee that." Savannah Alderman Van Johnson suggested that the city meet with residents before the budgeting process begins to reconcile what they want and what the city can afford. "We have a region that takes advantage of many of the services that we provide that they do not pay for," Johnson said. "So I think part of this discussion is educating individuals that we can give everybody what they want, but there is a cost to it." **Hernandez** said that the city's budget director, Melissa Carter, has already proposed holding several citizen engagement panels to walk residents through the budget process, "allowing them to see how difficult it is to put together a \$400 million budget for an enterprise the size of the city of Savannah." The council will hold two additional hearings at 9:45 a.m. and 2 p.m. July 19 before making a final vote on the tax rate increase.

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Savannah Morning News (GA)
June 8, 2018

City to Consider \$11M in Cuts
Council Approves Adding Sunday ‘Brunch Bill’ to November Ballot
Author: *Eric Curl*

With less than six months left to go, City Manager **Rob Hernandez** has been charged with cutting more than \$11 million from this year's budget. On Thursday, the Savannah City Council directed **Hernandez** to figure out over the next week what cuts can be made to make up for the anticipated loss in revenue, as the mayor and aldermen prepare to reduce the controversial fire fee by more than half in the face of widespread opposition. "We're just asking the city manager to go back and modify the numbers and bring us something forward that people can feel better about," said Mayor Eddie DeLoach. As proposed by the council, a property tax increase is not an option and the city would retain the one mill tax rate decrease that was approved in conjunction with the fire fee as part of the 2018 budget. The council's vote came after DeLoach announced on Wednesday a proposal to reduce the fee by 53 percent, which would bring the fee to \$120 for residential properties. The city is also offering discounts of up to 20 percent until June 15, which would bring the total to \$96. Mayor Pro Tem Carol Bell also suggested that **Hernandez** present an alternative option to cover the costs of eliminating the fire fee entirely. "As a council, let us determine if that's the way we want to go," Bell said. Previous attempts last month by Aldermen Van Johnson, Estella Shabazz and Tony Thomas to repeal or lower the fee were voted down by the remaining members of the city council during deliberations on how to spend \$10 million surplus from last year. On Thursday, Thomas said he was staunchly opposed to the fire fee, but was concerned the council was being unfair to **Hernandez** by not making the \$11 million reduction request when the surplus was presented. "I don't know if the city manager has truly analyzed that plan to see if he could reach that number," Thomas said. "And I don't know either what other options are completely out there." The surplus spending plan, which left the full fire fee intact, included funding to pay off the purchase of the Coastal Empire Fair site; complete the Cultural Arts Center; install computer security upgrades following a malware attack; fund a staff compensation study; and assist the Savannah-Chatham School Board in establishing an early learning center touted by DeLoach as an anti-poverty initiative.

Hernandez said Thursday he did not recommend using the surplus funds to make up fire fee cuts because the savings and unexpected revenue from 2017 were going toward one-time expenses and that the fire fee was meant to free up general funds for ongoing operational costs. "It would come back to bite us at some point in the future," he said. The proposed budget cuts are expected to be presented for the council's consideration during a budget workshop June 18. The tax rate has to be formally adopted by the end of the month and the council is expected to vote on the revised budget at their meeting June 21. Prior to the regular meeting, the council got a briefing on a hardship program the city is developing for low-income property owners who are unable to afford the fee. The city is now seeking a nonprofit social service provider to administer the program so applicants can also have an opportunity to get assistance with additional needs, said Tafanye Young, Chief Community Services Officer. "We're hoping that people will take advantage of this and see rewards beyond just the fire fee being waived," Young said.

Savannah Morning News (GA)
April 12, 2018

The Sense in the City's Spare Cents

Author: *Eric Curl*

Savannah had a better year, financially, than expected, according to city officials. Now, the city is planning on providing \$2 million in funding needed to complete the new Cultural Arts Center, paying for security upgrades following a recent computer malware attack, and covering the full costs of a 3-percent performance-based pay increases for employees, after recently closing out the 2017 budget with a \$10 million surplus. The surplus stemmed from a combination of about \$5.2 million in revenue coming in higher than anticipated, in addition to expenses coming in about \$4.7 million below budgeted amounts after the city implemented a hiring freeze last year, said City Manager **Rob Hernandez**.

Most of the growth was from elastic revenues, such as lodging and sales taxes, that expand and contract with strength of economy, **Hernandez** said. "We have a general idea how the economy is going to perform but it's a guess and science at the same time," he said. "So in 2018 our budgeting numbers are a bit more optimistic than they were when we put together the '17 budget, but something could happen tomorrow." The funding plan going before the Savannah City Council Thursday will also increase reserve funds, pay a debt owed for purchasing the Coastal Empire Fairgrounds site, and cover costs associated with converting a section of Montgomery Street for two-way traffic. In addition, staff is recommending that the revenue go towards staff relocation costs related to the planned sale of two downtown buildings and a compensation study to address pay inequities.

"We also did a reorganization this year and created new job titles," **Hernandez** said. "We think we slotted them in the right place, but it's time that we do a real in-depth review of our pay and compensation practices." Almost 100 positions were eliminated as part of the reorganization, with about 40 of them vacant, but dozens of new positions were added and impacted employees were given the opportunity to apply for the jobs. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position.

Hernandez said the surplus does not negate the need for the city's new fire services fee, which was implemented to correct a structural imbalance the city has faced for years. "If we didn't have the hiring freeze and agencies spent every dime we got budgeted, we would have only \$5.2 million in extra revenue," he said. "The fire fee provides us an opportunity to take \$21 million of pressure off of the general fund." The city council recently approved an ordinance that offers up to a 20 percent discount on the fee for installing safety equipment, developing emergency plans and participating in fire training programs. Property have between April 15 and June 1 to apply for the reduction before bills are sent out in the fall.

Meanwhile, the city also plans to spend about \$500,000 on new technology and services to boost

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security measures after a malware attack discovered in February impacted some city services. The malware appears to have been eliminated, but the city is still not accepting email attachments as a precaution, said city spokesperson Michelle Gavin. "We think that we've gotten it," Gavin said. "We've taken all the measures to wipe computers and have taken some extreme measures, but it's an ongoing thing."

Proposed surplus expenditures

Transfer to Reserves/General Fund Balance: \$2.5 million

Performance-based 1-percent employee pay increase: \$600,000

Cultural Arts Center Overrun: \$2 million

Montgomery Street redirection project: \$1 million

MPO agreement amendment: \$200,000

Revenue dept. relocation: \$500,000

Fairgrounds - Pay off Debt Service: \$1.4 million

IT/Malware Equipment Recovery: \$500,000

Relocation Contingency: \$100,000

Compensation study: \$300,000

Facility repairs and improvements: \$800,000

Rental of backhoe - Cemeteries: \$100,000

Total: \$10 million

Savannah Morning News (GA)
February 18, 2018

Savannah Restructures Government Operations
Officials Tout Plan as Way to Make City Operations More Efficient
Author: *Eric Curl*

New titles and responsibilities, along with salary increases in some cases, have been issued to a number of Savannah's department heads and top administrators as part of a government reorganization implemented by City Manager **Rob Hernandez**. Touted as a way to make city operations more efficient and achieve the Savannah City Council's priorities in a recently adopted strategic plan, new departments and positions have also been created, while others have been eliminated or modified. The restructuring consolidates two assistant city manager positions, one deputy to the assistant city manager position and five bureau chief positions into three executive officers. The employees selected for the new positions have the experience and personality to lead and get things done, **Hernandez** said. "That's what differentiates managers from leaders," he said. "I need leaders more than I need managers."

Paying for quality

Marty Johnston, formerly a deputy assistant to the city manager, was selected to fill the chief operating officer position, charged with asset management, customer service, special events coordination and oversight of the financial and internal service functions of the city. The move bumps her salary up from \$125,827 to \$148,000. Heath Lloyd was selected as Chief Infrastructure and Development Officer, after previously working as the public works and water resources operations director. Lloyd's responsibilities include ensuring the safety of the city's infrastructure, producing safe drinking water, protecting buildings and streets from flooding, and improving the development process. Lloyd's new salary amounts to \$148,000, up from his previous salary of \$109,414. Taffanye Young was hired as the city's Chief Community Services Officer after previously serving as the Community and Economic Development Bureau chief. Young is charged with unifying initiatives and programs focused on improving the lives of residents and providing them with clean, safe neighborhoods and access to quality housing, recreational facilities, leisure opportunities and supportive services. Her salary increased from \$132,282 to \$148,000.

The city's former budget director, Melissa Carter, also received a pay increase from \$89,400 to \$115,000 after being promoted to head the new Office of Management and Budget, which is responsible for preparing the city's yearly and long-term fiscal plans, as well as taking on an expanded role in grants development. And David Keating, who previously worked as a real property director, had his salary increased from \$84,025 to \$90,327 after being put in charge of a revamped Real Estate Services Department that now oversees property acquisitions, facilities maintenance, cemeteries, and the Civic Center. Pay was only increased for employees who have taken on additional responsibilities so that they are being fairly compensated, **Hernandez** said. "We want to keep the good ones," he said. "And also we have key positions we have to fill and we need to be able to compete and attract a quality workforce." Cutting grass and dysfunction After years of complaints about property maintenance issues and delays in completing planned

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projects, departments that never talked to one another were merged and new offices were launched as a way to eliminate government bureaucracy and improve focus, according to officials. To improve property maintenance, quality of life and tourism impacts, a new Code Compliance department was created. Previously, code-related activities were handled by multiple departments, prompting situations in which a property maintenance enforcement officer could not handle a zoning violation, or vice versa. In addition, property maintenance was only citing code violations on residential properties and letting violations on commercial properties go or referring them to the building department, **Hernandez** said. "So we said time out ... we're bringing all that in house," he said. "We're going to do cross-training and we're going to have commonality in how our code enforcement is handled and prosecuted."

Kevin Milton, a new employee with the city, has been hired as director of the department, with a salary of \$115,000. Former Property Maintenance Director Kimberly Corbin is now working as Code Compliance Assistant Director, with her salary remaining at \$80,368. Similar issues led to the consolidation of the city's landscape maintenance functions, including squares and monuments, into a new Greenscapes department. Prior to the consolidation, **Hernandez** said one team would cut an overgrown lot and then a different unit would come back a week later and cut the adjacent canal bank. And in some cases, **Hernandez** said, small equipment such as weed wackers would not be brought in until days after the larger mowers had cut down some city right-of-way. Now, work areas have been divided into grids that are maintained by regional teams responsible for basically anything that grows, **Hernandez** said. "They work a grid and don't leave that grid until everything is finished," he said.

Former Park & Tree Director Gordon Denney now heads the new department. His salary remains \$80,368. The reorganization also included the formation of the Capital Projects Management office, which **Hernandez** said put five full-time positions in charge of overseeing \$726 million in budgeted projects. That move was praised by Alderman Julian Miller recently when the council was given an update on the projects being funded by the voter-approved special purpose local option sales tax. Often-repeated concerns were raised about the time it has taken to complete some projects, and Miller noted that the department was created to address the issue. "This is one of those things going on behind the scenes that the public won't see that is really going to make a big difference," Miller said.

Staffing impacts

The restructuring came after the city imposed a hiring freeze upon **Hernandez's** arrival in October 2016, and at his direction only critical positions were filled for more than a year in anticipation of the changes. Almost 100 positions ended up being eliminated as part of the process, with about 40 of those vacant. Dozens of new positions were added, however, and impacted employees were given the opportunity to apply for those jobs. "In certain instances we were very lean in operations, and I think that was hurting us," **Hernandez** said. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position, **Hernandez** said.

Not all employees' pay went up after getting a new position. One former assistant city manager,

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Peter Shonka, ended up having his pay reduced by \$15,624 to \$140,619 after he became head of a new arena development district office - the office focused exclusively on developing the new arena and stimulating private and public investment in the surrounding redevelopment area. Such pay reductions were unfortunate, but in some cases could not be avoided, **Hernandez** said. "There may have been several, although not widespread, due to reduction in responsibilities," he said. A number of other staffers retained the same salary, while taking on new roles. Bridget Lidy, former Tourism and Ambassadorship director, was hired as the new Planning and Urban Design director after her department was eliminated. Her salary remains \$85,703.

And Bret Bell, newly titled assistant to the city manager rather than deputy assistant, is now charged with handling legislative priorities, preparing the council's agenda, and working to ensure residents' concerns brought to the attention of aldermen are addressed. His salary remains \$107,205. In addition, former Economic Development Department Director Manuel Dominguez's salary of \$80,368 was left unchanged after he became head of what is now the Office of Business Opportunity, which is responsible for administering and coordinating the city's economic and small business development program. After being delayed for about two months as they attempted to find suitable jobs for all of the impacted employees, the reorganization became effective Feb. 1, said **Hernandez**, whose salary remains \$238,000. "One thing I want to stress to folks is patience," he said. "We just put this new organizational alignment into play."

Savannah Morning News (GA)
December 30, 2017

City Manager Talks ‘Funkification,’ Ferris Wheels in Savannah
Opinions Expressed on Preserving Historic Structures Modernizing Others

Author: *Eric Curl*

A modern looking arena could be in play, but a proposed Ferris wheel on River Street is out of bounds. City Manager **Rob Hernandez** recently shared his thoughts on architecture, historic preservation and development in Savannah, as the guest speaker at the Historic District Board of Review's recent retreat. During the hour-long discussion earlier this month, **Hernandez** also took time to describe one of his architectural "pet peeves." "I hate red brick," **Hernandez** said. "We seem to have this tremendous love affair with red brick." He said he would like the new arena the city plans to build west of the Historic District to have a more modern look, perhaps with stainless steel and glass, while still paying homage to history. "But it doesn't have to be rooted in red brick," he said.

The arena site is outside the board's jurisdiction, but Chairman Stephen Merriman Jr. later said he is not necessarily opposed to a more modern looking building being built at the site. "I would be more opposed to build an arena that appears like it was built in the 1850s," Merriman said. "It gives a false sense of history." **Hernandez** also made it clear that he believes City Hall is no longer an efficient place for himself and other city staffers to work or for the Savannah City Council to hold their meetings. He talked about his plan to build a modern municipal complex in order to consolidate the city's workforce, while possibly converting City Hall into a "working museum" where the mayor and aldermen could have offices. "We're going to preserve City Hall," **Hernandez** said. "We have to preserve it, but the day-to-day stuff can go somewhere else." The 111-year-old building is in serious need of repairs, and funds for the structure's restoration will need to be raised, possibly by including the project in the 2019 special purpose local option sales tax referendum, he said.

Hernandez got some pushback from board members when he said he was considering replacing City Hall's deteriorating wooden windows with modern faux-wood frames to make them more efficient and hurricane-resistant. Board members were concerned the move would ruin the building's historic integrity and lead to private developers also wanting to bypass ordinance requirements. They suggested the city install exterior wood windows with interior storm windows to achieve the results he is seeking. Otherwise, the historic protections in place would crumble, Merriman said. "That's one of the biggest things Savannah has going for it, is our ordinance," he said. There are some buildings that seem ripe for "funkification," such as the old East Side Theater on the corner of East Broad and East Gwinnett streets, **Hernandez** said.

The historic theater with the words "Hungry World" across the old marquee has sat vacant for decades. "Not to be disrespectful of its character, but you can do cool things with it," **Hernandez** said. "That building has a lot of potential." In a similar vein, he would like to "funkify" Martin Luther King Jr. Boulevard around the Interstate 16 flyover, which he considers an eyesore. There have been plans proposed to demolish the ramp into downtown, but **Hernandez** said he does not

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see the structure going anywhere anytime soon. But the city is too busy trying to put out daily fires and has little time to be creative, **Hernandez** said. "You're the folks that need to come up with those ideas and we'll support it when we can," he said. **Hernandez** also made it clear that some proposals will not fly as the city tries to balance the demands of tourism with preservation efforts and residential needs. Board members thanked him after **Hernandez** said he and the city council recently rejected a request to install a Ferris wheel on River Street.

The 137-foot-tall observation wheel would have been installed on a city parking lot along the water between the Abercorn and Lincoln street ramps at an initial rate of \$17,000 a month, under the lease agreement proposed by Missouri-based SkyStar Wheel. "When I looked at that request, I said no way," **Hernandez** said. **Hernandez**, who previously worked as the deputy county administrator of Broward County, Fla., became Savannah's city manager in October 2016.

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Savannah Morning News (GA)
December 1, 2017

City Considers Budget Cuts, Fees to Cover its Shortfall
Hernandez: \$187 Million Proposal a Starting Point
Author: *Eric Curl*

Savannah staffers are proposing a variety of revenue generating options and expense cuts for the 2018 budget to determine whether the Savannah City Council wants to implement service enhancements or reductions in the face of projected funding shortfalls. The preliminary spending plan presented during the first day of a two-day budget retreat on Thursday amounts to a "bare bones, no frills and somewhat painful" general fund budget of \$187 million that includes almost \$13 million in cuts to personnel, services and capital project investment, said City Manager **Rob Hernandez**. "It's not even a recommended budget or a proposed budget," **Hernandez** said. "It's just a starting point for our conversation."

The second budget option of almost \$200 million would sustain existing services, as well provide funding for performance-based wage increases and increase reserve funds for unforeseen expenses. The third spending plan would be an "enhanced budget" of about \$213 million to cover expenses related to council priorities, such as additional police officers recommended by a consultant to improve emergency response times. Among the funding options staff presented was a proposed fee charged to all properties to cover the cost of fire department services and eliminate that department's dependence on tax revenue. Implementing a fee to cover the full cost of fire services would amount to \$370 per household and raise an estimated \$31.5 million, according to the budget report.

A consultant, Ecological Planning Group, also presented reduced rates as an option that would cover between 50 percent and 75 percent of fire service costs and raise about \$15.7 million to \$23.6 million. Property tax increases and decreases of between half a mill and two mills were also proposed, with revenue impacts ranging between \$2.5 million and \$10 million. "Anything you decide today for this budget is going to play out and have an effect for the next few years," said Erick van Malssen, who was working with the fire fee consultant. A hardship fund to assist low-income property owners is now being considered as part of the fire fee proposal, if it is adopted.

Savannah Alderman Van Johnson said he is still concerned about the fee's impact since renters would not be eligible to receive payments from the fund, even if the fee's cost was passed onto them by landlords. But Alderman Julian Miller said rental rates are established by the market and he does not expect tenants to be adversely affected as a result of the fee. Alderman Tony Thomas said renters would be impacted, but that the more than 5,800 tax-exempt property owners benefiting from fire services need to contribute to those costs. "Those folks have got to participate," Thomas said. "It's going to be tough for some people, but some people have been riding this system for decades."

The \$12.7 million in spending cuts are being proposed, despite projected increases in property

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tax revenue and other tax revenue streams this year and next. The shortfall is due to a combination of factors, including an increase of tax exemptions, operating costs and growing debt payments related to property purchases, infrastructure improvements and public safety purchases, **Hernandez** said. "We have a lot of needs in the city that far exceed the revenues available to us," he said. A surplus of about \$3.8 million is actually anticipated for 2017, due to higher than projected tax growth and salary savings from a hiring freeze. Those funds are proposed to be used to offset a budgeted use of reserve funds for 2017 and help cover expenses related to hurricane damages and capital project overruns.

The city is also anticipating some employee payouts due to some officers joining the county police department, following the split of Savannah-Chatham police. Planned civilian staff cuts stemming from a government restructuring should only result in a "handful" of employees actually leaving the organization since those impacted will have the opportunity to fill other positions, **Hernandez** said. The second day of the budget retreat is scheduled to begin at 8:30 a.m. Friday. During the workshop staff will need the council to make a decision on what type of funding options or cuts they want to move ahead with, **Hernandez** said. "I have to get some clarification on what they want to do because I have to put together a final budget," he said.

Savannah Now – Savannah Morning News (GA)
February 11, 2017

Poverty Persists in Savannah, Despite City Programs

Author: *Eric Curl*

Austin Spell, 20, wants to be a pipe-fitter or EMT. That is why he was recently sitting in a classroom at the Moses Jackson Advancement Center, where he and six others were registering for a GED program put on by Savannah Tech. Spell said he was pulled out of school by his stepfather in eighth grade and he does not have the educational background he needs to meet his career goals. “I’m planning on getting my bachelor’s degree and see what I can make out of myself,” he said. The GED program is one of many programs at the city-supported advancement center that are meant to help Savannah residents find employment. Still, Savannah’s high poverty level persists. The percentage of Savannah’s population living below the poverty level was almost 27 percent in 2015 — up from almost 22 percent in 2000, according to the US Census Bureau’s American Community Survey. The increase occurred as the city invested \$2.7 million in general funds in anti-poverty programs between 2011 and 2016, including \$642,600 to support the advancement center, according to a recent report presented by city staffers. During that time, another \$1.1 million was spent supporting Step Up Savannah’s job training and anti-poverty initiatives, and \$981,304 went toward various social service agencies.

About a million dollars in federal funds supported the advancement center and social services offered by America’s Second Harvest of Coastal Georgia, Union Mission and Lutheran Services of Coastal Georgia. Taffanye Young, Community and Economic Development Bureau chief, recently attributed the increased poverty rate to the recession when she presented the report to the Savannah City Council during an economic mobility workshop. “You had a lot of jobs that were lost,” Young said. “A lot of people with higher incomes and higher skills ended up taking some of the lower skilled jobs.” And job training is no “magic bullet” when residents have child care, transportation, substance abuse and criminal background issues to deal with, Young said. Only 17 percent of the 507 individuals who received job training through the city-funded programs since 2011 ended up becoming employed, according to the staff report. Those type of results are not satisfactory, City Manager **Rob Hernandez** told the council. “We may have to do something entirely different with some of these populations that have drastic barriers,” **Hernandez** said.

Hospitality programs

Other programs have fared better, however. The US Department of Labor’s Workforce Innovation and Opportunity Act only employed 34 percent of the 1,256 Chatham County participants since 2011, although many of those participants are still engaged in the program, according to the staff report. And since 2014, 316 adults received job training through the Step Up’s Chatham Apprentice Program, with 59 percent becoming employed. Another 159 jobs have been created or retained since 2011 for low- to moderate-income residents through a city-supported loan program administered by the Small Business Assistance Corporation. Goodwill of Southeast Georgia is helping residents find work with the launch this year of a hospitality training program at the advancement center. Rashena Platt, one of the six-week program’s

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participants, said that after three months of being unemployed, the program helped “get her foot in the door” and find a job as a housekeeper.

Whether hospitality-based jobs will help Savannah reduce the poverty rate has been a matter of local debate. The growing number of hotels has drawn some criticism from residents, who are concerned about the city becoming too dependent on what they contend are low paying jobs. But Borish Jenkins, a Goodwill Career Center assistant who conducts the training course, said the hospitality industry does offer opportunities for advancement and better pay. Hotel employees, for instance, can start as a housekeeper, go to front desk, then become a supervisor and from supervisor become a general manager, said Jenkins, a former hotel employee himself. “I know it can be lucrative,” he said. And some hotels, such as developer Richard Kessler’s Plant Riverside \$270 million hotel project being built along West River Street, are going to be offering higher pay, Jenkins said.

The Plant Riverside project is located in a state opportunity zone, which makes Kessler eligible for job tax credits for providing employment in an impoverished area. The hotel is supposed to create 700 full-time permanent positions with benefits, including health insurance, and Kessler is required to pay at least \$10.25 as part of the tax credit agreement, but he has said beginning wages could reach as high as \$15 an hour. As for Platt’s plans, she said she plans on working her way up to be a manager. “You always have an opportunity for advancement,” she said. “So just take your time and move up.”

‘Outside the box’

City staffers said that they plan on improving coordination among service providers, identify new revenue sources, aggressively promote programs, and think “outside the box” to reduce the poverty rate and provide more employment opportunities. Young said that the city may want to try to re-implement a partnership with a local church that had retirees provide training, such as brick laying, for residents seeking job skills. Staff is also working on a proposal that will hopefully address some of the hard to hire issues with respect to city contracts and city employment, **Hernandez** said.

<https://www.wsav.com/news/savannahs-city-manager-on-his-first-3-weeks/>

Nov 9, 2016

Savannah's City Manager on His First 3 Weeks

by: Andrew Davis

He was the choice of the council to lead the city of Savannah. In just three weeks on the job, City Manager **Rob Hernandez** has already been through a hurricane and multiple murders. But what does Savannah's City Manager think the next three weeks, months, even years may hold.

"Making decisions without having all the appropriate facts or knowing all the different facets of the community that could be dangerous," said **Hernandez**. That's why **Rob Hernandez** says he is in "listen, learn and observe" mode. Observing the community he now helps shape.

Shaping with a community and a staff he has already seen deal with a hurricane, and thrive under pressure. "The reverse would be that i'm here 6 months or a year and we would have a crisis and what would be going through my mind would be, well i don't know who I would rely on, I don't know how this team is going to perform, I now know that," explained the City Manager. He also knows is that crime in Savannah is a problem. "The community is very concerned about it, the community expects us to take proactive measures and we have," said **Hernandez**.

But the same community also may be too focused on each and every criminal act. "When we have an instance of crime that happens here it's unfortunate," explains **Hernandez**. "But it stands out more i think in the community mindset because it's out there its closer to them it gets publicized more in the city of Savannah." But he is not ready to rubber stamp the high cost of putting more officers on the streets. Stressing Fiscal responsibility, he hopes to find "progressive" ways to get police what they want in 2017. "My job is to balance all the competing needs in the community and to try to make a fiscally sound and operationally sound recommendation to the nine that eventually have to make the decisions," explained the City Manager.

The decisions about growth of our city is foremost on **Hernandez's** mind. "We can't afford to be as methodical as we have been in the past again because the world is moving at a breakneck speed, and we have to keep up with the world," said **Hernandez**. "Are we behind?" "I'm not saying we are behind. But we have to pick up the pace." Pace of life, and pace of drawing businesses to Savannah. "Make sure they know Savannah more than just a great place to visit. A great place to relocate your business," said **Hernandez**. "Oh and by the way they have a really great local government as well."

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Sun Sentinel
SEP 21, 2016

Deputy Broward administrator leaving for Savannah

By Brittany Wallman

The No. 2 official in Broward County government has resigned, after accepting a job in Georgia. Roberto "Rob" **Hernandez**, deputy county administrator, said in a letter to County Administrator Bertha Henry earlier this month that it was with "great sorrow" he submits his resignation.

Hernandez was responsible for a large portion of county government, and also brokered the deal with the Florida Panthers that increased the hockey club's public subsidy but helped ensure the team would stay. In a handwritten note on the resignation letter, he thanked Henry for mentoring him, and giving him "the tough tasks to take on, like the arena."

Besides the deputy position, Henry has two assistant county administrators, Monica Cepero and Alphonso Jefferson, and two assistants to the county administrator, Gretchen Cassini and Alan Cohen.

Hernandez has been the deputy in Coral Springs and in Atlanta's Fulton County. But he said his professional goal was to be in the top position. "I'm not getting any younger and the years are just flying by, so this was the right time and the right community," the 50-year-old **Hernandez** said in an email recently. "I did not want to take any city manager or county manager job just for the sake of it, unless the community was right. Savannah is a nice town with lots of positive attributes and challenges, too." **Hernandez's** resignation is effective Oct. 9.

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WTOC 11 (GA)
August 11, 2016

City of Savannah Names Roberto Hernandez as Sole Finalist for City Manager

Author: *Sean Evans*

The City of Savannah held a news conference on Thursday to discuss updates in the search for the new city manager. After a nationwide search, and in a unanimous consensus and recommendation, **Roberto Hernandez**, deputy county administrator of Broward County, Florida, has been named the sole finalist for the position of City Manager of Savannah. Choosing **Hernandez** was a unanimous decision by city council members, and **Hernandez** has accepted the offer pending contractual negotiations according to Mayor Eddie DeLoach. DeLoach said **Hernandez's** hands-on approach, experience in government and energy are some of the qualities that separated him from the other candidates.

According to the Broward County Government website:

Hernandez is an ICMA-Credentialed Manager with more than twenty years of progressive and responsible local government management experience. He re-joined Broward County in July 2013 as Deputy County Administrator. Previously, he served as Deputy City Manager for the City of Coral Springs overseeing various city functions as well as the city's community redevelopment agency. Prior to Coral Springs, he served as Deputy County Manager for Fulton County, Ga., where he oversaw public safety agencies, unincorporated area services, the Office of the Child Attorney, offender reentry program, and coordinated with the County's constitutional and judicial agencies. He previously served Broward County in a variety of capacities from 1994 through 2008, including serving as an Assistant to the County Administrator from November 2003 to June 2008. **Rob** retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

Hernandez was a finalist for two other jobs previously. He was a finalist for the El Paso County, TX County Administrator position earlier this year, and was a finalist for the Delray Beach City Manager position in 2014. **Hernandez** talked about the advantages the region presents, with the ports, travel opportunities with Savannah-Hilton Head International Airport and the proximity to the beach and overall rich history, as well as the military presence. "I was very impressed by the passion from the city council in terms of what they see happening in the city over time, and their strong dedication to the community. That really, that really sold me," said **Hernandez**. While in Fulton County, **Hernandez** oversaw multiple departments including police, fire and rescue and also served as the county manager's liaison with judicial agencies.

Mayor DeLoach says he believes **Hernandez** could come in and start working right away with the police department and judicial services in Savannah to address crime. Alderwoman Carol Bell says she was impressed with how much **Mr. Hernandez** knew about the city and its operations already. So WTOC asked the front-runner what he's observed so far and hopes to achieve as the next city manager. "The need for continued re-investment in certain communities, a progressive strategy for bringing new investment for the community, for growing jobs. For

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fixing and updating the condition of the infrastructure. Those are the things that everybody goes through, it's very common. But that's certainly something that I'm going to have to tackle once I get there," said **Hernandez**. Savannah City Council members met on Wednesday to hear from the search committee about where they are on the final candidates up for the position. The council and search committee then met behind closed doors in an executive session.

Current City Manager Stephanie Cutter announced her retirement at the beginning of the year, setting into motion a nationwide search for her replacement. So, what exactly was the city looking for when they put out the posting for a new city manager? It's an important question given that at least the last two city managers were not what the respective city councils eventually wanted in the role. First of all, for those who forgot or perhaps never knew, ours is a Council/City manager form of government. Meaning while the council appoints a city manager, the city manager runs the city and some might argue, the city council itself.

First and foremost council was looking for a person who had worked with and understood the challenges of a diverse community, not just racially but economically. Someone who could bring new ideas for breaking the cycle of poverty among those living in certain neglected parts of Savannah. And, of course, someone who bring new ideas to the table when it comes to fighting violent crime, in particular, gun violence. Here's an interesting role they want this person to fill: possible ax-man. Council, at least the newest members, want this new city manager to review city government top to bottom and start cutting if Savannah's City Hall has gotten too big, and taxpayers are paying too much for something that could be done with fewer people and resources.

For filling this role, our new city manager will receive the city's benefits package and a salary between \$210,000 and \$300,000. That's yet to be negotiated if **Roberto Hernandez** is our man. We mention briefly where this candidate has been and what positions he's held in the past. You may be thinking of all his deputy roles that this guy has always been the groomsman and never the groom. And **Hernandez** anticipated that issue in his actual resume' saying, "...I've resisted the temptation to 'chase' city manager positions solely for the sake of becoming a city manager at any cost. Instead, I've judiciously and patiently served in deputy roles in great organizations and exceptional communities."

Hernandez considers himself a pretty simply, straight-forward guy. He says his management style is fluid. It adapts to the specific situation. Not that we're looking yet, but **Hernandez** will tell you he is clean. This is what he told recruiters before tossing his hat in the ring: "...There is 'no dirt' on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night." We will continue to follow those negotiations and let you know exactly what the city decides when it comes to salary, contract length, start time and other allowances.

Tribune Content Agency News Service (USA)
May 20, 2016

Is Broward ready for a hurricane hit? Drill shows how rescue would work

Author: *David Fleshler*

May 20--After raking the Florida Keys and Miami-Dade County, Hurricane Kimo reached Miramar as a lethal Category 3 storm, with sustained winds of 129 mph, and tore a diagonal corridor to Deerfield Beach. The slow-moving storm bore into the county for seven hours. A tornado struck Pembroke Pines, Cooper City, Davie and Fort Lauderdale. An eight-foot storm surge trapped people on barrier islands. With cell towers damaged, many smart phones became useless. This was the scenario Thursday as Broward County conducted a full-scale hurricane drill at the Emergency Operations Center in Plantation to prepare for the June 1 opening of hurricane season. About 300 people gathered on the operations center's vast open second floor to practice receiving calls for help, coordinating responses and dealing with the countless challenges of a natural disaster.

"We've got to get it right the first time," **Rob Hernandez**, deputy county administrator, told the group. "The public expects that we'll get it right the first time. We can't offer them excuses. There are no alibis, there are no mulligans." The scenario began seven hours after the all-clear, as the county lay damaged, darkened by power outages and full of a untold crises, with fatalities reported, residents trapped by floodwaters and many situations requiring immediate attention. Like much of contemporary life, the response to the crisis would be coordinated largely through a computer software program, in this case WebEOC 8.0, a crisis-management system developed by Intermedix Corp. of Fort Lauderdale.

As calls for help and reports of problems such as power outages came in, it was up to those in the room to route them to the right agency or issue the correct orders to deal with them. The group included representatives of law enforcement agencies, fire departments, the county government, Florida Power & Light Co., city governments, the Red Cross and many other organizations. A call to rescue four people trapped on a roof in Oakland Park was routed to the Broward Sheriff's Office, said Major Kevin Shults, who headed the Sheriff's Office group at the emergency operations center. But the law enforcement agency's helicopters didn't have the sort of basket-and-line system required for such an endeavor. They asked the Coast Guard to do it instead. A call for water came from Pompano Beach, where the storm damaged the treatment plant, reducing its output by half. Alan Garcia, director of the county's division of water and wastewater services, ordered emergency interconnects from a county water plant that would temporarily provide the city with sufficient water.

In the pressroom, public communications specialist Cindy Malin scrawled occasional updates on a white board: "Flooding and tornado damage throughout county. Exact location TBD." "Drones being used to assess damage." As the various reports, crises and calls for help came in, evaluators in green vests observed the work in each area. They will prepare written reports. The Red Cross, which operates shelters, faced a crisis when 2,500 people showed up at a Coconut Creek shelter that was already full. The issue was "escalated" to a high-ranking group of

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decision-makers, who authorized the opening of an additional shelter. "The exercise is to test our abilities to collaborate, communicate and respond," said Roberto Baltodano, the Red Cross' regional communications manager. "These are things that could happen during a real hurricane. We've had these hurricane scenarios." The county has not seen a direct hit from a hurricane since Wilma in 2005. "It's been 11 years since we had one," County Mayor Marty Kiar said to the group before the drill began. "Hopefully this will be another year that we're hurricane-free. But eventually we're going to get hit."

South Florida Sun Sentinel (FL)
Dec 8, 2015

Deal helps Panthers, helps Broward more

The Broward County Commission should approve a new agreement today with the Florida Panthers because the deal would better protect the public's investment in the BB&T Center. One can argue persuasively the county was wrong to make that investment of tourist tax revenue 20 years ago, when the Panthers wanted out of the old Miami Arena. A National Hockey League team draws fewer tourists than Broward's beaches and the convention center. The county, however, can't back out of that commitment. With that in mind, county administrators make their more persuasive case for the front-loaded \$86 million deal that would run through 2028.

One argument against the deal is the public shouldn't subsidize the rich owners of the Panthers. Deputy County Administrator **Roberto Hernandez** responds that the money -- none of it property tax revenue -- would go toward the arena, not the Panthers. The team owners also run the company that manages the BB&T Center. They would have to spend the \$86 million on improving, operating and promoting the arena, of which the team is the main tenant. The county would have to sign off on the improvements. The team also would continue to pay \$5.3 million per year toward the arena's debt, which will be paid off in 2028. So the county's investment would go to the county's facility.

The other main argument against the deal is the county should spend the money on projects that better play to Broward's tourism strengths -- such as beaches. Two other key priorities are an expanded convention center and a convention center hotel. The arena is far from the county's major tourism hubs. **Hernandez** acknowledged, "We are very sensitive to that." He believes, however, the county can "meet all of our obligations" regarding tourism promotion, especially beach renourishment. County officials, **Hernandez** said, routinely have made conservative estimates of 3 percent for increases in tourist tax revenue. In fact, annual increases have been more like 5 percent.

The county has put much of that balance in reserve, **Hernandez** said. A recent study of the tourist tax questioned the amount of money held in reserve. Doing so, **Hernandez** said, means the county can use that money for one-time projects like beach renourishment and still pay the recurring expenses of the Panthers deal. Part of this story is the coming debate over raising the tourist tax from 5 percent to 6 percent, even though none of that potential revenue is part of the Panthers deal. It is generally agreed money from the sixth cent would go toward convention center expansion.

Hernandez said the county is waiting for bids on the expansion. When administrators have an idea of the cost, the county will start discussions on raising the tax. Miami-Dade and Palm Beach counties have raised their tourist taxes to 6 percent. +The deal would cut the county in for a share of profits if the money-losing Panthers became big winners on the ice and financially. The arena would have a better chance of getting an all-star game, and the team would continue to help youth hockey in Broward. All are nice points, but the focus of the deal, correctly, would remain

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on the BB&T Center. The healthier it is, the better for the county. Losing the Panthers would mean losing 40 dates, and the BB&T Center has lots of regional competitors. So the arena is healthier with the Panthers, and with the team having a better chance to succeed.

Having studied the financials, **Hernandez** said, "We came to the conclusion that it would cost the county almost as much if the team stayed as if the team left. It's almost an economic wash. So if we would pay with or without them, it's better to have them." The deal would allow the Panthers to leave after eight years, but the team would have to repay the \$72 million in tourist tax revenue it had received. If the team left after eight years, the county would have enough money to repay the arena debt. As long as the Panthers stay, **Hernandez** said, "We transfer a lot of the responsibility to the team." The county also would get development rights to land around the arena. One other point in the deal is worth noting. Two decades ago, the county committed to spending two cents of tourist tax revenue on the arena. The county hasn't met that obligation. Under the deal, **Hernandez** said, the Panthers would drop all claims to any unspent money. There might be emotional reasons to reject the Panthers deal. There are better business reasons to approve it.

Capital Gazette (PA)
March 3, 2015

Broward Commission Brainstorms Ways to Help Struggling Center Pocket of County

Author: *Brittany Wallman*

In the heart of Broward County is a zone of economic depression that even the most dramatic real estate boom didn't lift out of poverty. The unincorporated neighborhoods in the 33311 zip code — roughly between Interstate 95 and U.S. 441, north of Broward Boulevard — were left behind by the cities around them. No city will take them. County commissioners are their only local government. Commissioners met Tuesday to talk about the central county community — four mostly African-American neighborhoods of about 7,000 people — and agree on a host of small efforts to help. Only \$4.8 million is allotted for economic development there — a sliver of the county's overall \$4.1 billion budget. County Commissioner Dale Holness, the area's only direct local representative, said it's the first economic development money the county has spent there since the 1980s. About \$30 million has been spent on improvements of roadways, bus shelters, drainage and the like. The moves commissioners endorsed Tuesday are hardly dramatic: Relocating a Boys and Girls Club to Delevoe Park, continuing building homes on 144 lots the county owns, working with small businesses to improve properties by offering loans or grants, giving a makeover to some of the roadways, improving parks, and banking land for future redevelopment. No one promised an immediate turnaround. "It doesn't happen overnight," county Economic Development Director Sandy-Michael McDonald warned. But county leaders said they support a renewed focus. "I'm glad to see we're moving forward with some planning," Holness said, "because the community desperately needs it." While the rest of Broward enjoys a rebound from the Great Recession, with three years now of positive economic growth, the central county zone remains stagnant. "These communities look to us to guide them along the way to economic prosperity in their neighborhoods," Deputy County Administrator **Rob Hernandez** said.

Joblessness is down to about 5 percent countywide. But in Central Broward, it ranges from 21 percent in Boulevard Gardens, to 22 percent in Roosevelt Gardens, to 32 percent in Washington Park, to an astounding 44 percent in Franklin Park. Holness said many residents there lack transportation and job skills, and some have criminal backgrounds — all obstacles to employment. Countywide, the median household income is \$51,251. In the central county area, it's significantly lower, at \$33,432, Assistant County Administrator Alphonso Jefferson said. Crime is down there, county officials said. Still, the number of rapes, burglaries, car thefts and assaults are relatively high in such a small area, county leaders said, and residents complain they regularly witness drug deals and prostitution, as well as assaults. Broward County Administrator Bertha Henry said she would begin implementing the economic development ideas discussed Tuesday. McDonald said he hoped to leverage the money to spark private investment from business owners. Each project will return to a County Commission agenda for approvals. Across downtown, at the Fort Lauderdale City Commission, Commissioner Robert McKinzie asked that the city take another look at annexing the unincorporated areas. The city will move in that direction.

Broward New Times (FL)
March 18, 2014

Florida Panthers Asking for Public Money, but Proposal Seems to Benefit Only the Team

Author: *Chris Joseph*

Looks like the Florida Panthers' latest proposal to Broward County has altered language that would basically screw over the county while they make the big dough, according to a rundown of the proposal by the Sun Sentinel. The first proposal the Panthers made at the beginning of the year had asked the county for something around \$70 million, claiming that they had been losing \$20 million and that they need public funds to keep from being dissolved from the NHL. This latest proposal asks for \$80 million or more. The Panthers also want to develop 22 acres north of the BB&T Center for a casino-hotel that the county is also supposed to pay for. The Panthers turned over the 57-page proposal to Broward County commissioners and, according to the Sentinel's findings, it boils down to more money for the team while the county gets the shaft. Those wishes are not far off from when the team asked for county money originally back in January. The team's original proposal included taking \$4.5 million of its annual payment off the books and having it picked up by Broward County. The team also asked the county to contribute \$500,000 a year toward maintenance.

The latest proposal says the Panthers need a hotel-tax subsidy package worth \$80 million over the next 14 years to keep them from losing money. But the overall deal would seem to benefit only the Panthers. "As currently written in their proposal," Deputy County Administrator **Rob Hernandez** told the Sun-Sentinel, "it would definitely have an impact on our ability to share in any of the profits." County officials say they won't support the proposal without a better return for Broward's taxpayers. Back in September, the Panthers were bought for \$240 million by Cliff Viner and Sunrise Sports & Entertainment to a group led by New York businessman Vincent Viola. The Panthers have had an operating loss of \$12 million for the 2011-12 season and were worth \$170 million, according to Forbes. As for Panther and hockey fans' reaction to this, they took to Twitter with the usual vitriol.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

US Fed News (USA)
August 11, 2013

Broward County Names New Deputy County Administrator

Author: *Staff*

Broward County has issued the following news release:

Broward County Administrator Bertha Henry has announced the appointment of **Roberto "Rob" Hernandez** as the new Deputy County Administrator. **Hernandez** is an experienced public servant who served as deputy county manager for Fulton County, Georgia, and most recently as deputy city manager for Coral Springs in Broward County. He is returning to County Government, where he first began serving the County in 1994 and most recently served as an assistant to the county administrator from 2003 to 2008. As deputy county administrator, **Hernandez** will assist the administrator in managing the day-to-day operations of the County, and oversee the activities of several large departments, including Public Works, Human Services and Environmental Protection and Growth Management, as well as the Parks and Recreation, Libraries and Cultural divisions. Also reporting to **Hernandez** will be the Office of Economic and Small Business Development, Office of Public Communications, Office of Intergovernmental Affairs and Professional Standards, and the Office of the Medical Examiner and Trauma Services.

Henry said, "We are excited to have **Rob** back with Broward County. He has dedicated much of his professional life to public service and has a keen understanding of how county government programs and services help meet the needs of our residents, businesses and visitors. He will be a valuable asset to the County and the community." **Hernandez** has a bachelor's degree in public administration from Florida International University, and a master's degree in public administration from Nova Southeastern University. He is a graduate of the Broward Fire Academy and the U.S. Army John F. Kennedy Special Warfare Center and School. He retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

McClatchy-Tribune Regional News (USA)
February 6, 2013

Brief: Coral Springs Offers Incentive to Company

Author: *Lisa J. Huriash*

Taxpayers will be handing over cash to a new business considering coming to town, although they don't know yet who is getting the check. City officials said the business, described as a "pharmaceutical manufacturing, research and development" company, is a coup for the city. The company is expected to bring 108 jobs and a new source of tax revenue to the city.

Dubbed "Project Rock Solid," the business will receive \$540,000 in state, county and city money in incentives through the state's qualified target industry tax refund program. In addition to the city's portion of \$54,000, city commissioners agreed Tuesday to allow \$825,000 in credits that would normally be paid for fees such as building permits.

"The bottom line is if we don't offer incentives, somebody else will," said **Rob Hernandez**, deputy city manager. "It's the cost of doing business." The company is allowed by state law to remain unknown to the public while it's in this process of receiving incentive money. **Hernandez** said the company asked to remain anonymous for competitive reasons.

McClatchy-Tribune Regional News (USA)
December 13, 2012

Coral Springs to Consider building New City Hall

Author: *Lisa J. Huriash*

City commissioners said Tuesday they were open to the idea of spending millions of dollars to construct a brand new City Hall. "To me, the short answer is yes," said Commissioner Claudette Bruck. "We should proceed and we should proceed now." City leaders must now decide if they really want the new building, where it will go and how to pay for the estimated \$25 million cost. It will eventually be a "financial decision," said Vice Mayor Tom Powers. "There's way too many questions." For about a year, former Mayor Roy Gold had proposed closing both City Hall buildings on the north and south sides of Sample Road to construct one large facility.

But while some commissioners had previously said the project could become unwieldy and too expensive and they doubted there would be public support, the majority now seem open to at least further discussion. Deputy City Manager **Rob Hernandez** said the 45-year-old building was "outdated and functionally obsolete." "You can go anywhere and hear conversations in the next office," he said. And, the current building is "not a source of civic pride." "That's depressing," Bruck said. **Hernandez** also said the current building is expensive to keep up, with \$1 million alone needed to retrofit the building to accommodate a new telephone system.

"If we're pouring money into a facility that is no longer worth pouring money into," the commission should consider a new building, said Commissioner Dan Daley. City Manager Erdal Donmez said the city staff will come back with "more refined numbers" in late January with the projected costs to build a new City Hall at various spots, which include the current location, Mullins Park, and the area envisioned to be built as a downtown.

Several South Florida cities have recently built new City Hall complexes. Doral earlier this year spent \$22 million on its new building and Wellington built its new building last year for \$10.5 million. In Coral Springs, officials said municipal bonds would be the best way to cover the expense Commissioner Larry Vignola said he has always opposed the plan and still does. "Is it a top priority to spend more than \$20 million on? Not in my opinion, and not in the opinion of the majority of our residents. I don't why we're still talking about this. I don't think now is the time for a project like that."

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

South Florida Sun Sentinel (FL)
November 24, 2011

Springs Gets New Deputy City Manager

Author: *Arun Sivasankaran*

Roberto Hernandez, who has over 20 years of progressive and responsible local government management experience, has been appointed Coral Springs Deputy City Manager. "I look forward to leveraging **Rob's** operational expertise to continue delivering exceptional services to our community with the best possible level of service," City Manager Erdal Donmez said. Prior to joining Coral Springs, **Hernandez** was the Deputy County Manager for Fulton County since 2008. **Hernandez** also served as an Assistant to the County Administrator for Broward County. Before that, **Hernandez** served in a number of key roles with local government.

His professional experience includes key positions in public safety, housing and community development, and social services. In addition, his military service includes more than 23 years in the U.S. Army Reserves. He has held several leadership positions and has served on Active Duty in support of several military operations. **Hernandez** holds a Master of Public Administration degree from Nova Southeastern University and a Bachelor of Public Administration from Florida International University. **Hernandez** also obtained his certification in firefighting from the Broward Fire Academy.

The Atlanta Journal-Constitution (GA)
May 25, 2011

Illegal Dumping

Putting the Brakes on Tire Dumping

It's no Easy Task as Illegal Activity Stealthily Spreads Across State

Author: *Ernie Suggs*

Over 10 days last fall, someone made three trips to the Arts Exchange and dumped more than 1,000 old, dirty tires onto the property. The location was ideal. Easy access off I-20 in southeast Atlanta. A dead-end road. A wide-open space. Across Georgia, there are hundreds of examples of illegal tire dumping such as this, on public and private lands, creating a problem that is as much health hazard as it is eyesore. Of 10 million scrap tires generated in the state annually, an estimated 1.5 million are discarded illegally, the Georgia Environmental Protection Division said. And Atlanta finds itself at the center of this rubberized abandonment, with its city council compelled this week to form a separate tire commission to combat the violators. The city annually deals with 450,000 scrap tires, nearly 70,000 of them dumped illegally, said Winthrop Brown, Georgia EPD program manager.

Not surprisingly, money is at the heart of this problem: Tire salvagers get paid to collect tires but many of them won't pay for recycling. So they dump the tires. Everywhere they can. "It is a very significant problem in the state, because of the expense and because these tires are breeding spots for mosquitoes and vectors," said Brown, noting that Newton County last year collected 67,000 dumped tires. "Dumping is bad in metro Atlanta because of the population, but dumping is increasing in rural areas because of the distance they have to travel to get rid of tires."

As part of his job, the EPD's Brown regulates how tires are disposed from car dealerships and tire shops, among others. Businesses must pay for a carrier to pick up truckloads of old tires. Otherwise, there is little concentrated enforcement. Tire dumping is a felony, but there are just five criminal cases currently pursued by the state, though several people previously have served prison time for this offense, Brown said. "If nobody calls it in, we have a hard time prosecuting," Brown said, adding there are only a few local jurisdictions, such as Columbus and Macon, that have their own laws on the books, though state regulations exist. In April, Atlanta Councilwoman Joyce Sheperd, who pushed for the tire commission, led a clean-up in District 12 in which 2,000 tossed tires were collected. In southeast Atlanta, she has overseen the retrieval of 4,711 tires this year, and more than 10,000 over the past five years.

Fulton County Deputy Manager **Rob Hernandez** said south Fulton has the same problem as Atlanta with illegal tire dumping and no ready solution. The county has considered putting a deposit price on used tires, similar to glass bottles, to encourage residents to take them to a landfill. "It's difficult to prosecute offenders unless they're caught in the act," **Hernandez** said, "and Fulton lacks the staff to try to trace tires back to suppliers and find out who they were sold to." Last summer, the Fulton County health department spent \$23,000 on a tire drive that netted 2,100 tires. The public works department pays \$50,000 per year to dispose of old tires. "This has been a real problem for us," said Cheryl Odeleye of the Arts Exchange, surveying the endless

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Roberto Hernandez
(Articles are in reverse chronological order)

and unwanted black mountain left near the center. "It is a health hazard. And it is a morale downer for someone to come in and be so disrespectful to us."

Piles of old tires don't necessarily present toxic health issues, rather they serve as nesting places for rats, snakes and mosquitoes, little consolation to those left with this mess. Across metro Atlanta, jurisdictions vary in how to deal with dump sites. DeKalb County officials said they defer to state law in dealing with tire dumping. In Clayton County, illegal dumping can land someone in jail for six months. Cobb County claimed it hasn't had much of an issue with discarded tires, outside of a few isolated incidents. "What a lot of people don't understand is that there are a lot of expenses involved in tire disposal," Dewey Grantham of Liberty Tire Recycling said.

If operating lawfully, a carrier takes used tires to a recycler, where in Georgia there is a 90 percent chance these tires will be converted to fuel. A carrier typically charges \$2 per tire, but has to pay the recycler \$1 for each, cutting into the profit. An illegal carrier might charge \$1.50 per tire on pick-ups, bypass the recycler and leave the tires at an isolated place like the Arts Exchange. There also have been cases in which people have rented trucks and abandoned them filled with old tires. Bolder criminals have stocked empty warehouses with worn tires. The state lacks funding to properly monitor tire disposal. For every new tire larger than 12 inches and sold in Georgia, a consumer pays a \$1 fee, which was supposed to go to a solid waste fund. Yet for two years, state lawmakers have diverted the funds elsewhere, covering other needs. Limited state spending also has resulted in fewer inspectors, making it harder to monitor and clean up tire dump sites.

The Arts Exchange, even with more than 1,000 tires, had what was considered a small clean-up. Liberty Tire Recycling volunteered to remove the tires, employing four workers. The tires were loaded in less than two hours. Grantham said his company processes 25,000 tires daily. "What is unfortunate is that illegal tire dumping gives tire recycling a bad name," Grantham said.

Tire disposal

Number of scrap tires generated in Georgia annually: 10 million

Number of those that are disposed of illegally: 1.5 million

Fulton public works department's expense each year for tire disposal: \$50,000

State fee charged on each new tire larger than 12 inches that is supposed to fund a solid waste fund, but has been diverted for the past two years for other purposes: \$1

The Atlanta Journal-Constitution (GA)
May 16, 2011

Your Tax Dollars

Grumbling Greet's Amphitheater

Supporters See Boon for South Fulton; Opponents Question Use of Funds

Author: *Johnny Edwards*

South Fulton has a lot to brag about these days. After last week's announcement that Porsche would leave Sandy Springs to build its North American headquarters near Hapeville, Fulton County officials will open the new 5,200-seat Wolf Creek Amphitheater. Supporters are counting on the venue becoming another Chastain Park, a regional draw where picnicking music fans take in classy, intimate concerts. Fulton County Commissioner William "Bill" Edwards, who has championed the \$6.1 million project for the past decade, predicts it will draw the spending power of concertgoers from throughout the metro area to nearby stores and restaurants, bolstering a local economy hit hard by the recession.

But the amphitheater is a sore subject for north Fulton residents who say it's another case of the county government using their tax money for projects that don't benefit them. State Rep. Lynne Riley, R-Johns Creek, who opposed the amphitheater when she was a Fulton commissioner, said the \$6.1 million shouldn't have come from the county's general fund. "Every citizen of Fulton County, regardless of where they live, top to bottom, is underwriting the cost of operating that facility," she said, "whether it's a gain or a loss."

Edwards said south Fulton residents pay county taxes, too. "South Fulton needs to be able to live, work and play right where they are," he said. Business owners between the amphitheater, which is off Camp Creek Parkway, and I-285 expect a boost. Anwar Noorali, owner of Camp Creek World of Beverage, predicts a 15 percent to 20 percent increase in business on concert days from wine shoppers. "Any economic activity, and concerts that bring in a lot of people, will definitely be good for the local economy," Noorali said.

But some point to the location -- in the flight path of the world's busiest airport -- as an issue. Michael Fitzgerald, a Johns Creek resident and member of the Milton County Legislative Advisory Committee, said he can't fathom making a 45-mile drive to attend a show there, not with the constant roar of jet planes overhead. "One of the problems with Fulton County is it's too big, and that's a long way," he said.

The Wolf Creek Amphitheater has stirred tensions along the way. When the construction contract was approved in 2008, Riley and Commissioner Tom Lowe were outvoted 4-2. Riley contended that figures from a 2005 feasibility study -- which predicted the amphitheater would be profitable after three years -- needed to be updated. Edwards fired back that she and Lowe were trying to sabotage a revenue-generating project that south Fulton wanted. Edwards also brought up that the county spent \$1 million on Alpharetta's Verizon Wireless Amphitheatre, which was privately built. The county's contribution came through a trade-off for north Fulton not having garbage service at the time. Gary Bongiovanni, editor-in-chief of Pollstar Magazine,

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said a 5,200-seat venue will have a tough time up against the 6,500-seat Chastain Park in Buckhead, the 12,000-seat Verizon amphitheater, and the 19,000-seat Aaron's Amphitheatre at Lakewood in southeast Atlanta. The proximity to Hartsfield-Jackson International Airport won't help, Bongiovanni said. "Especially if you're talking about doing any acoustic acts," he said.

Fulton County Arts Council interim Director Michael Simanga, whose department will run the amphitheater, said he isn't worried about planes. Before construction began, the county held free concerts at the site, including Atlanta Symphony Orchestra performances. "You can't really hear it, once the music is playing," Simanga said. Grammy-winning soul/R&B singer India Arie will perform a free concert June 4 for the grand opening. No shows have been booked after that, he said, though he's in negotiations for some. Riley questions whether Wolf Creek will cover its operating costs.

The county doesn't have a detailed operating budget yet. Deputy County Manager **Rob Hernandez** said planners didn't expect the facility to be finished this soon, so the upcoming concert season will be something of a trial run, with 10 shows at the most. The plan is to recoup costs through concert bookings, and the County Commission has approved a fee schedule. Expenses should be limited to electricity, water, janitorial maintenance and groundskeeping, like any public park, **Hernandez** said.

Wolf Creek was the shooting venue for the 1996 Olympics, and it currently houses a police training center. A new library is in the works, and other plans include a sports complex, walking trails, horse trails, and an arts, cultural and events center, which also could generate revenue through bookings, Edwards said. Alre Alston, owner of the Ultimate Bar and Grille in Camp Creek Pointe shopping center, expects the amphitheater to bring him customers before and after shows. "I think it will be a good thing, as long as they bring in the quality clientele, not the rough clientele," he said.

Edwards said the county won't allow hard-core rap acts. He's looking for shows that appeal to south Fulton residents, citing performers that played free concerts -- R&B groups such as the Manhattans, the Spinners, the Dells and the O'Jays. However, he said, north Fulton residents are welcome to book shows, too. The amphitheater also can be used for church functions and graduations. On a recent visit, Edwards showed off the massive stage, the pristine dressing rooms for stars and the 4 feet of legroom between the rows of seats. He said he has no doubt the project will pay for itself. "It isn't about being sustaining," Edwards said. "Let me tell you what we want to pay: lights and water. This is for the people, for people to come out here and have a good time."

The Atlanta Journal-Constitution (GA)
January 22, 2011

Fulton Hikes Club Fees Despite Suit
Judge Declared Adult Ordinance Invalid after Free Speech Dispute
Strip Joints' Attorneys Debating Next Step

Author: *Johnny Edwards*

Fulton County will raise fees on strip clubs by hundreds of dollars this year and double them for nude dancers, even though the county remains locked in litigation over the fees after a federal judge recently declared the adult entertainment ordinance unconstitutional. With no discussion, the commission voted 5-1 this week to raise a list of fees on businesses and residents in unincorporated south Fulton expected to generate an extra \$303,601 per year. Amid new and increased rates for false alarms, fire safety inspections, escort services and door-to-door salesmen were several license and permit hikes on the county's three nude bars off Fulton Industrial Boulevard.

Attorneys for the clubs say they are considering what to do: whether to seek an injunction or pay the fees and hope to recoup them as damages. "I don't know what right they have to increase them when the case is still being litigated," said Jim Cline, who represents Riley's Showbar. "I guess they can do whatever they want. I guess we can argue about it when we get to the end." **Rob Hernandez**, the deputy county manager for the South Fulton Special Services District, said the county attorney advised officials that since the lawsuit is still pending, Fulton is justified in raising the fees. If a club refuses to pay, it could have its license revoked and would face closure, he said. "There was an injunction ordered on certain aspects of the ordinance, but not all aspects of the ordinance," **Hernandez** said.

County Attorney R. David Ware did not return messages from The Atlanta Journal-Constitution inquiring about the issue. The judge's ruling arose from a First Amendment lawsuit filed by a group of clubs in 2001 that challenged the county's revved-up regulation of nude dancing as a prior restraint on free speech, part of a larger battle being waged throughout metro in both state and federal courts. The clubs won the 2001 case in U.S. District Court. It was reversed on appeal, and then it was sent back to District Court. In November 2010, Senior U.S. District Judge Robert Vining ruled that the code illegally put the clubs through a bureaucratic wringer, making them wait indefinitely for approval from police, fire and building departments. While Vining withheld judgment on whether the fees were too high, he did say that if sections of the ordinance don't hold up, none of it can stand. "Judge Vining has said that we don't have an ordinance," Cline said. "Unless they appeal, then there's no ordinance unless they go back and pass one."

But starting Feb. 1, the county will raise the cost of an adult entertainment license from \$6,000 to \$6,400 and annual license renewal from \$4,000 to \$4,300. Employee permits will rise from \$300 to \$325, permit renewals from \$50 to \$100, employee background checks from \$50 to \$55 and fire inspections from \$30 to \$75. The increases are expected to generate an additional \$11,590 per year. Cary Wiggins, an attorney for Fannie's Cabaret, said that since nude dancing is protected speech, a county's licensing fees can be no more than the cost of regulation. He said

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Roberto Hernandez
(Articles are in reverse chronological order)

there is no evidence that nude bars cause any more problems for police than regular bars, and he doesn't see how Fulton can charge \$4,000 to renew a license, much less \$4,300. "I'm just unaware of any evidence justifying a rate hike," Wiggins said.

The third club off Fulton Industrial, Club Babe's, isn't taking part in the lawsuit. Managers at all three declined interview requests. Wiggins also represents two Sandy Springs clubs that, while no longer in unincorporated Fulton, are seeking back compensation from the period before Sandy Springs became a city. As with the state government and other local jurisdictions, the Fulton fee hikes are part of a strategy to make up for declining revenue without burdening property-tax payers. **Hernandez** said he is also trying to recover costs and adjust an array of charges, many of which haven't changed in five years, for inflation. North Fulton Commissioner Liz Hausmann cast the sole dissenting vote Wednesday. She told the AJC that she opposes raising any fees or taxes in this economy without reducing spending. She said she wasn't aware of the strip club issue.

The Atlanta Journal-Constitution (GA)
May 17, 2010

County Targets Image Change
Campaign is to Clean up Fulton Industrial
Code Enforcers, Police Start out Cracking Down on Boulevard's Motels
Author: *Steve Visse*

Fulton County has an image problem with its huge warehouse district: Its legitimate economic opportunities sometimes have been overshadowed by its undesirable qualities. This has caused companies to bypass it and take their business across the Chattahoochee River to Cobb and Douglas counties, or get out of Fulton and relocate. "We have had tenants who have been there for years and years and who decided to move across the river," said Tom Flanigan, ING Clarion asset manager. "I don't think it was taxes." To attract new business and keep what it has, Fulton is pushing a campaign designed to clean up what it says is the 10 percent of Fulton Industrial Boulevard that gives the rest of it a bad name. For starters, code enforcers and police have targeted motels that allegedly were centers for sex and drug trades; three were closed for health and safety violations, and a fourth was sold to a new owner, who refurbished the property and secured a Days Inn franchise.

The new motel has posted rules in the lobby banning unregistered guests from rooms and requiring identification to reserve a room as a customer. "We got rid of a hub of criminal activity," said Tom Phillips, county code enforcement administrator. "You can walk in there now and say, 'I can stay here.' Two years ago you wouldn't have said that. You might not even have walked in there." At its last meeting, the County Commission banned truck drivers from parking their big rigs in vacant lots off the boulevard and using them as unofficial truck stops. "Truck stops, as you know, have a link to prostitution," Phillips said. Even strip clubs such as Fannies' Cabaret are seeking a more orderly boulevard. Fannies' is trying to distance itself from prostitution, specifically the hookers who regularly have solicited the club's clientele when arriving and leaving. The club hired security to run them off. "It didn't used to be this way 15 years ago," said Thomas Madden, Fannies' Cabaret general manager.

Police have cracked down, making 107 prostitution arrests in the past two years compared to 41 in the three previous years, according to county statistics. The county is committed to restoring a clean-cut image to the boulevard's seven-mile roadway that runs from Fulton County Airport at Charlie Brown Field to Campbellton Road in south Fulton, according to Deputy County Manager **Rob Hernandez**.

The area has 89 million square feet of warehouse and commercial space but a county study released in March showed that several buildings and warehouses, developed in the 1960s and 1970s, are practically unusable. Seven properties are listed on the Georgia Hazardous Site Inventory, including five for the presence of cancer-causing vinyl chloride. Noting its potential, the study described the boulevard as potentially one of the largest and most prestigious warehousing and transportation hubs east of the Mississippi River. "Today it may still be the largest, but it has lost much of its prestige," the report concluded. Last month, the county used

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the area blight and vacant warehouses to have the district reclassified as an opportunity zone urban redevelopment area. That allows it to borrow \$26 million from a federal bond program and give employers a \$3,500 tax credit for each new job for 10 years. **Hernandez** said the county wants to use the bond money to install crime surveillance cameras in the area. A \$100,000 federal grant already was secured to increase police patrols and hire seven officers specific for south Fulton. "We're serious about this," **Hernandez** said. "We have put together everything we have available in our tool box to assist Fulton Industrial."

Satellite offices for county services and commissioners Emma Darnell and Bill Edwards have been set up to show the county is committed to improving the area. People have noticed. Companies recently either bought or leased separate industrial properties that cover a combined 260,000 square feet. With upgrades, the area should be able to sell itself. It is located in the center of a metro area that promotes itself as a national transportation hub. Fulton Industrial offers a regional airport and is close to Hartsfield-Jackson International Airport. I-20 is located nearby, as is the Norfolk Southern Intermodal container shipping yard in Austell, an industrial area crisscrossed by railroad tracks.

A next step would be to develop a Community Improvement District, which has happened elsewhere in Fulton and in Cobb, DeKalb and Gwinnett counties. CIDs require commercial property owners to tax themselves to pay for development plans, transportation alternatives and security. Boulevard activists so far have been unable to obtain 51 percent approval of the property owners to install a CID, which increases tax bills by 3 or 4 mills. Yet one man on board with this idea is Madden, the strip club manager, who recognizes that even the adult entertainment business needs better security. "We have to keep it clean here," he said.

The Atlanta Journal-Constitution (GA)
October 9, 2008

Fulton Begins Taking Steps to Aid 911 Center

Author: *D. L. Bennett*

Fulton County has begun making changes that officials hope will improve a 911 center beset by chronic understaffing and dangerous operator errors. By filling 12 vacancies and promising reforms to reduce job-related stress, county officials say they should be able to boost both work quality and employee retention. "We are adamant when we say we are going to solve the problems in the center," said **Roberto Hernandez**, deputy county manager. "Once we know all the facts, we will address it immediately. We will fix it."

Problems at the center that takes emergency calls and dispatches aid were discovered in August when an operator mistakenly sent help to the wrong location for a Johns Creek woman who later died. An Atlanta Journal-Constitution investigation found more than 1,000 write-ups of employees during the past five years for everything from fighting, dispatching mistakes and chronic tardiness to falling asleep on the job. Current and former employees complained that understaffing leads to workers being routinely forced to work 12- and 16-hour days, straining family life and causing conflicts in the center, dispatching and call-taking errors. The inquiry found mistakes that endangered not only callers seeking help but the emergency crews sent to provide aid.

Fulton also has launched three of its own investigations -- one by an outside consultant reviewing center operations, another by police of the incident on Aug. 2 and a third by **Hernandez** and others looking at employee satisfaction issues. Rather than wait for those all to be complete, County Manager Zachary Williams has filled 12 of 33 openings for communications officers and supervisors by reassigning operators who previously provided service for the city of Milton under contract. Milton dispatching is now handled by Alpharetta.

"This definitely should add value and reduce stress on the staff," said Commissioner Lynne Riley, who represents the city of Johns Creek, where Darlene Dukes died Aug. 2. Fulton also has in process two classes of trainees who should be able to fill all the remaining spots, a move he hopes will cut down on stress at the center and reduce conflict and mistakes. Everyone should be on the job within six months, **Hernandez** said.

"We remain committed to excellence in all public safety services, and recognize that 911 operators are the first link in the chain of emergency response," said Williams. "These men and women save lives each day." The auditor's report is now due Nov. 10. The internal probe by police should wrap up this week. **Hernandez** said the committee's work on employee issues is ongoing and its plans address issues like child care for employees who work odd hours and stress management.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

The Atlanta Journal-Constitution (GA)
October 5, 2008

Not Enough Workers and a lot of Slack

Author: *Heather Vogell & D. L. Bennett*

A supervisor told 911 worker JoLynn Griffin she didn't have any days left for vacation. The Fulton County emergency center had barely enough workers to cover shifts. But Griffin went on a cruise anyway. She returned to find her job waiting, her personnel file shows, just as it had been when she'd missed work before. Chronic absenteeism and tardiness are among the center's most vexing problems, records and interviews suggest, accounting for roughly a quarter of all personnel infractions and aggravating a staffing shortage that can mean marathon shifts for the dispatchers who do show up. Griffin is one of scores of Fulton 911 employees who racked up roughly 280 sanctions for arriving late or not at all -- often on multiple days -- a database of personnel actions since January 2004 reveals. The problem is likely worse; officials say their data is not comprehensive.

No-shows were counseled, warned and occasionally suspended. But they were rarely fired, data show. Some workers accumulated long disciplinary histories that included 911 call errors as well as absences, and they weren't terminated, according to personnel files. "It appears that certain violations of performance were tolerated or forgiven, for lack of a better word, in order to maintain the staffing required to operate the center," said Lynne Riley, a Fulton commissioner. Losing trained employees wasn't an attractive option for the 911 center. In recent weeks, as many as a third of the center's total positions have sat vacant. Deputy County Manager **Rob Hernandez** said staffing shortages are common at 911 centers, but Fulton's center needs to train more new workers and improve retention. A county consultant should address discipline problems such as absenteeism, he said. "In general, discipline was used like a tool -- a management tool -- rather than as a last resort," he said. "It may have lost its intended effect."

Data show at least eight 911 workers have been sanctioned 10 or more times for playing hooky or walking in late since 2004. Migraines, oversleeping and not feeling well were regular excuses, files say. Employees also blamed a pet illness, panic attack, traffic, getting back in town late, driving a child to school, car problems and a broken toilet. Even current center director Crystal Williams has filed her share of tardy slips, records show, citing late starts, trouble finding parking, feeling ill and, on at least three days, alarm clock malfunctions. Reached by phone, she declined to comment. Former 911 center employees said chronic tardiness and absenteeism led to feuding among staffers. Cassandra Eloi said that during her year at the center it was common to be held over for extra work because others failed to show. Those who did come in often worked 12 to 16 hours straight, she said. "You are running a 911 center on minimal staffing every day," said Eloi, who was fired for being rude to callers. "You have calls holding. You have calls dropping, every day."

Griffin left without permission for the cruise and two other short vacations between September 2003 and March 2004 -- in addition to taking dozens of sick days and showing up late at least 14 times, records show. Alfred "Rocky" Moore, the center's director at the time, wrote in a March

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

2004 letter that he was considering dismissing her. "Your personal vacation [cruise] did not justify an emergency vacation," he wrote. But Griffin hung on, volunteering for a demotion instead. Her tardiness continued. One night in January 2006, the call center sent a Fulton sheriff's car to pick her up for work because she had car trouble, records show. Later that year, she was suspended after supervisors said an error she made delayed response to a fire call. She took disability retirement in mid-2007.

Griffin, a 23-year center veteran who was called "an excellent supervisor" in a 1995 job review, said in an interview she disputes that she caused a delay on the fire call, or that her unpaid leave resulted in a staffing shortage that couldn't be covered. She said she was singled out for infractions that others -- including supervisors -- also committed. She felt Moore had a grudge against her. "There was no reason to deny me," Griffin said of her vacation requests. "It's not like I didn't do my share of covering for people, either."

Other workers also complained discipline was not handed out evenly. "There are subjects who manage to be sick every payday weekend and never receive any type of discipline from your same staff," communications officer Francesca Pearson wrote in an April memo to Moore. Pearson could not be reached for comment for this article. Morale was low. After a supervisor threatened one employee with suspension for tardiness, she responded: "go ahead and suspend me that's one less day that I have to work here," a note in her personnel file said. Moore, who was reassigned, did not return three phone messages seeking comment.

The 911 center hasn't lacked the money to fill vacancies. For the past three years, the center -- funded by fees tacked onto phone bills -- has ended the year with excess cash in its salary account, records show. In 2007, it finished nearly \$1 million richer than it started. Instead, **Hernandez** said the center appears unable to keep up with attrition. Some drop out during the intense six-month training period. Others start but find the pressure and night shifts unworkable. Child care and worries about job security as some cities encroach on Fulton's call territory are also factors, he said. He said he does not want to second-guess center managers on their handling of absent employees. But it is a serious problem. "I know my boss would consider that to be job abandonment," he said.

Data analysts John Perry and Megan Clarke and staff writer Cameron McWhirter contributed to this article. 32 emergency calls delayed. Six of those calls were delayed more than 20 minutes.

- * 23 instances of employees being orally abusive, fighting, being unprofessional or disruptive in the call center. 34 write-ups for poor customer service. 9 instances of dispatchers sleeping on duty. 280 write-ups of not showing up to work or showing up late. 147 write-ups for not meeting monthly standards for speed and safety by the department.
- * Numbers based on a review of the incomplete database of disciplinary actions against employees at Fulton County's 911 center.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
April 29, 1997

Conditions for Planned Shelter don's Allay Fears

Author: *Robin Benedick*

No matter how many conditions the city puts on the proposed homeless shelter on West Sunrise Boulevard, they won't appease nearby property owners who worry about transients congregating near their homes, businesses and public parks. "Those conditions won't keep vagrants from wandering around the neighborhoods," said Fort Lauderdale Vice Mayor Tim Smith, who is among the shelter's harshest critics. "Unless there are incredibly stringent rules that you can only go in by vehicle and leave by bus, that neighborhood is going to be overrun."

Smith and neighborhood leaders are hoping to derail Broward County's plans for a \$7.7 million shelter at 600 W. Sunrise Blvd. Their first chance comes at a special meeting of the city Planning and Zoning Board at 6:30 p.m. Wednesday at City Hall, 100 N. Andrews Ave. The board's recommendation goes to city commissioners for hearings. One of the conditions the city wants to put on the proposed 200-bed homeless assistance center is that it accept no walk-ins - only tenants who are referred there by an agency or police. That means homeless people now accustomed to staying the night at Tent City, the dingy open-air camp in a downtown parking lot, won't get into the new shelter without referrals.

Opponents are pushing the planning board to delay approval until Broward hires a not-for-profit group to run the center and community leaders raise \$3 million in private donations for the project. The shelter is expected to be completed in 18 months once city approvals are granted. Broward County's architect, Edward Seymour, has designed a two-story shelter patterned after one in Miami. The building would face Sunrise Boulevard, but entrances and parking would be at Northwest Sixth and Seventh avenues. The fenced campus would have separate men's and women's dormitories with room for families, classrooms, a medical clinic, day-care center, dining hall and courtyard.

City planners are recommending approval with these conditions:

- Availability: Center must give priority to Fort Lauderdale's homeless who are within two miles of the center.
- Security: Center must pay for 24-hour security inside and outside the campus.
- Curfew: Center must require tenants to be inside from 8 p.m. to 7 a.m. daily. Exceptions would be made for school or work.
- No walk-ins: Center must not accept people without a referral. Center also must establish a no-loitering policy on the property and post signs.
- Citizen board: Center must set up a neighborhood advisory board.

County officials said they were designing a shelter that wouldn't be a magnet for uninvited homeless people. "The word will quickly get out among the homeless that this facility does not accept walk-ins," said **Rob Hernandez**, Broward County's assistant director of Human Services. With more than 5,000 homeless people in Broward, the shelter is billed as the first of several to

Internet – Newspaper Archives Searches

Roberto Hernandez

(Articles are in reverse chronological order)

address a growing problem that could get worse under new federal and state welfare reforms. Homeless advocates worry that police will enforce trespassing and other city laws too eagerly to chase transients from public places. "Being homeless is not a crime and it shouldn't be that they go to jail for that," said Dianne Sepielli, a member of the county's homeless advisory board.

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
March 13, 1994

New Refugees like Broward Cuban Immigrants Find more Opportunities, Less Congestion
Author: *Lyda Longa*

When Geovanny Montes de Oca and 11 of his friends set sail from Havana for the United States aboard a rubber raft in October, Montes de Oca's friends couldn't stop talking about Miami. But after the men were rescued by the U.S. Coast Guard and taken to Key West, Montes de Oca set his sights on a different place: Broward County. His relatives had described Broward as an area where plenty of opportunities could be found. "I like Miami, but up here, there's less congestion and life is more relaxed," Montes de Oca said in Spanish. "I love it here because I'm learning English, I have a job and I even got a car," he said. Montes de Oca works at the Fort Lauderdale-Hollywood International Airport's catering service. Montes de Oca, who lives with friends in west Hollywood, is not alone. In the past six months, a colony of about 50 or 60 Cuban rafters has taken root in Hollywood and Fort Lauderdale.

The reason is simple: The rafters believe that employment and housing are easier to get in Broward than in Dade County. Historically, rafters have flocked to Dade County because they felt more comfortable among their Cuban countrymen, said **Roberto Hernandez**, executive director of Hispanic Unity of Florida. But that's changing. "Lately, the rafters have learned that in Broward there is less congestion and a better chance of finding a job," **Hernandez** said. "Many of them also have friends and family in the area who have told them that Broward County has less Hispanics and less competition for work."

According to the 1990 U.S. Census, there were roughly 109,000 Hispanics in Broward County compared to almost 1 million in Dade. Of those, there were 24,000 Cubans in Broward and almost 570,000 Cubans in Dade. Hector Nodarse, 29, heard about Broward County when he was still in Havana earlier this year. Nodarse was a sound technician with El Ballet Nacional de Cuba - the Cuban National Ballet. "I like the hustle and bustle of Miami because it reminds me of Havana, but I already have a job here {in Broward}," Nodarse said. "Broward is a little too quiet for me, but I'll get used to it."

Brothers Roberto and Raydel Rivera of Dania are two more Cuban rafters who ended up in Broward. The Riveras arrived in Miami aboard a rubber raft in December; they came from the Cuban port town of Mariel. Both are learning English at a night school in Hollywood. "I lived in Miami for about a month before I came to Dania, and I tell you life is better here," Roberto Rivera, 22, said in Spanish. "I'm learning English, I just got my driver's license and soon, I know I'll have a job. Once I get that I'll get my own apartment. Life is good here."

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
February 22, 1994

Planned Center may Help Elderly Hispanics

Author: *Lyda Longa*

Inez Carrascillo is an elderly Hispanic woman who wants somebody to talk to. When you're 76 and the only language you speak is Spanish, it's hard to make friends in a neighborhood filled mostly with young working Anglos. Soon, Carrascillo, who is Cuban, and other elderly Hispanics in Broward County could have a place to spend time together, working on arts and crafts and chatting in Spanish.

Roberto Hernandez, director of Hispanic Unity of Broward, said he hopes to open the county's first senior center for Hispanics in the next few months. The proposed center, which would be in Hollywood, would provide activities, meals, transportation and companionship for Broward Hispanics over 60. The 1990 U.S. Census estimated there were 11,891 elderly Hispanics in the county. "There is no single place in Broward County where elderly Hispanic people can go just to talk and relax with their peers," **Hernandez** said. "When you reach a certain age, you want to be with other people who share a similar culture and can understand you."

Hernandez, 27, has applied for a \$100,000 county grant that would pay for four full-time employees for the planned center. Last year he purchased a 7,000-square-foot building at 5840 Johnson St. for the center with the help of a grant from the city of Hollywood. Edith Lederberg, executive director of the Area Agency on Aging, said she has promised **Hernandez** that her organization would provide meals for the center once it opens.

Although there are a handful of senior centers scattered throughout the county, Lederberg and other social service officials agree that none cater specifically to Broward's Hispanic elderly. "We have several senior centers throughout the county, but elderly Hispanic people won't go there because they feel uncomfortable and out of place," Lederberg said.

That feeling is not limited to elderly Hispanic people. Gema **Hernandez**, a sociologist and associate professor at Nova University's School of Business, said the sentiment is shared by most elderly people of varying ethnic backgrounds. "As we age, most of us have a need to return to our ethnic roots," **Hernandez** said. Carrascillo, who stays alone during the day in her west Hollywood home while her daughter and grandchildren go to work and school, said she needs someone to interact with during those long hours.

Research Compiled by: Amanda Dillabough
 Colin Baenziger & Associates

Appendix D

***St. Johns County, FL Resolution Thanking
CB&A for Its Outstanding Service***

RESOLUTION NO. 2007-23

**A RESOLUTION OF THE COUNTY COMMISSION
OF ST. JOHNS COUNTY, FLORIDA, THANKING
COLIN BAENZIGER & ASSOCIATES FOR ITS
OUTSTANDING EFFORTS IN CONDUCTING THE
EXECUTIVE SEARCH FOR THE COUNTY'S NEW
ADMINISTRATOR; AND PROVIDING AN
EFFECTIVE DATE.**

WHEREAS, St. Johns County retained Colin Baenziger & Associates (CB&A) to identify and recommend strong candidates to be the County Administrator;

WHEREAS, CB&A's staff worked diligently to find and produce excellent candidates, and then provided the County Commission with comprehensive materials concerning the candidates' aptitude, experience, background, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and newspaper archives of these candidates; and

WHEREAS, CB&A's process was completely open, fair and unbiased and was extremely well received by the County Commission, county staff, the press, and the public; and

WHEREAS, the County Commission wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the county;

**NOW BE IT THEREFORE RESOLVED BY THE COUNTY COMMISSION OF
ST. JOHNS COUNTY, FLORIDA AS FOLLOWS:**

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

Section 2: Acknowledgement. The County Commission wishes to express its sincere appreciation and gratitude to Colin Baenziger & Associates for its outstanding work and effort in assisting the county in finding its County Administrator.

Section 3: Effective Date. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED by the Board of County Commissioners of St. Johns County, Florida, this 21 day of August, 2007.

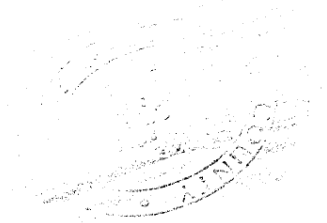
ATTEST: Cheryl Strickland, Clerk

**BOARD OF COUNTY COMMISSIONERS
ST. JOHNS COUNTY, FLORIDA**

By: Pam Halterman
Deputy Clerk

By: Ben Rich
Ben Rich, Chairman

Rendition Date: 8/23/07



Appendix E

Comments from Dale Martin on CB&A's Vetting Process

Fernandina Observer™

A JOURNAL OF NEWS AND OPINION

Weekly comments from Dale Martin

By Dale Martin, City Manager, City of Fernandina Beach

March 18, 2016 1:00 a.m.

The vetting process employed by Mr. Colin Baenziger following my application to the City of Fernandina Beach was the most thorough review of my career, credentials, and references that I have ever experienced. In the months leading to my appointment here, I was interviewed in several other communities for similar City Manager positions. Despite getting to the interview stage in those communities, none of my references ever indicated to me that they had been contacted. As part of the selection process here, I was required to provide an exhaustive list of references, some very specific, such as my current Town Attorney, auditor, Chamber of Commerce, etc. To the best of my knowledge, every single reference provided was contacted.

The historic information provided to the City Commission for each candidate was extensive. Reading through the older newspaper articles rekindled so many memories- the personalities and issues from earlier days illustrate some peaks and valleys over the past twenty years. It has been a wonderful ride.

Note: Mr. Martin reminisces about his career for the remainder of the article. The full article can be found at:

<http://fernandinaobserver.com/2016/03/18/weekly-comments-from-dale-martin-5/#more-65218>

Fernandina Beach, Florida Request for Proposal City Manager Executive Search Services RFP #23-07

March 23, 2023



630 Dundee Road
Suite 225
Northbrook, IL 60062

Primary Contact Person:

Laurie Pederson
Director of Administrative Services
847-380-3198
LPederson@GovHRusa.com

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Consultant Biography

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Cover Letter

March 23, 2023

City of Fernandina Beach
ATTN: City Clerk's Office – RFP #23-07
204 Ash Street
Fernandina Beach, FL 32034

Dear Ms. Best and Members of the City Commission:

Thank you for the opportunity to provide you with a proposal for the City Manager recruitment and selection process for the City of Fernandina Beach, Florida. GovHR USA ("GovHR") prides itself on a tailored, personal approach to executive recruitment and selection, able to adapt to your specific requirements for the position.

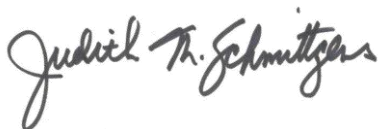
GovHR is a public management consulting firm serving municipal clients and other public-sector entities on a national basis. Our headquarters offices are in Northbrook, Illinois. We are a certified Female Business Enterprise and work exclusively in the public sector. We have 21 full-time and 8 permanent part-time employees including 6 full-time recruiters and 26 additional project consultants. Our employees and project consultants are located across the country, giving us a national presence. GovHR offers customized executive recruitment services and completes other management studies and consulting projects for communities.

GovHR Vice President Alan Rosen will be responsible for your recruitment and selection process, and he will be assisted by GovHR President Heidi Voorhees and by a home office Recruitment Coordinator and a Reference Specialist. Mr. Rosen's biography is attached to the proposal and his contact information is:

Alan Rosen
Vice President, GovHR USA
Minneola, FL
954-644-9999
Arosen@GovHRusa.com

We believe we have provided you with a comprehensive proposal; however, if you would like a service that you do not see, let us know. Please contact Laurie Pederson, Director of Administrative Services, 847-380-3198, if you have questions regarding our proposal or need additional information. We look forward to hearing from you and hope to have the opportunity to work with you on this important recruitment.

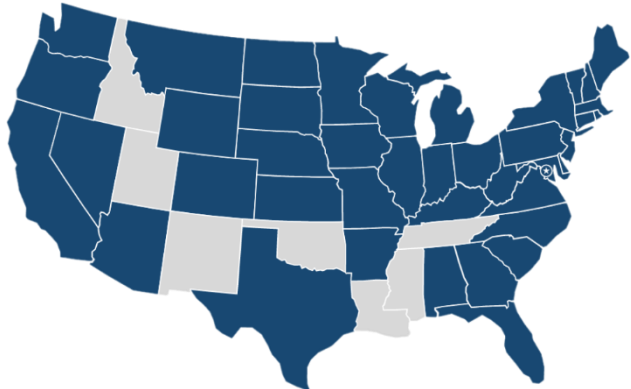
Sincerely,



Judith Schmittgens
Corporate Secretary and Compliance Manager

Firm Profile

GovHR is a public management consulting firm serving local government clients and other public-sector entities across the country. The firm was originally formed as Voorhees Associates in 2009 and changed its name to GovHR USA in 2013. Our headquarters are in Northbrook, Illinois. We are a certified Female Business Enterprise in the State of Illinois and work exclusively in the public and non-profit sectors. GovHR offers customized executive recruitment services, management studies and consulting projects for local government and organizations who work with local government.



GovHR has 21 full-time and 8 permanent part-time employees including 6 full-time recruiters and 26 additional project consultants who are based in Arizona, Colorado, Florida, Georgia, Illinois, Indiana, Massachusetts, Michigan, Minnesota, Ohio, Tennessee, Texas and Wisconsin, giving us a national presence. Additionally, GovTempsUSA, GovHR's subsidiary, provides interim staffing solutions to keep operations moving during the recruitment process.

Our consultants are experienced executive recruiters who have conducted over 1,000 recruitments, working with cities, counties, special districts, and other governmental entities of all sizes throughout the country. In addition, we have held leadership positions within local government, giving us an understanding of the complexities and challenges facing today's public sector leaders.

Our Leadership



Heidi Voorhees

President

847-380-3240

HVoorhees@GovHRusa.com

Ms. Voorhees has conducted more than 400 recruitments in her management consulting career, with many of her clients being repeat clients, attesting to the high quality of work performed for them. In addition to her 17 years of executive recruitment and management consulting experience, Ms. Voorhees has 19 years of local government leadership and management service, including ten years as Village Manager for the Village of Wilmette, Illinois.



Joellen Cademartori

Chief Executive Officer

847-380-3238

JCademartori@GovHRusa.com

Ms. Cademartori is a seasoned manager, with expertise in public sector human resources management. She has held positions from Human Resources Director and Administrative Services Director to Assistant Town Manager and Assistant County Manager. Ms. Cademartori has worked in forms of government ranging from Open Town Meeting to Council-Manager and has supervised all municipal and county departments ranging from Public Safety and Public Works to Mental Health and Social Services.

Why Choose GovHR?

Unparalleled Expertise and Level of Service: We are a leader in the field of local government recruitment and selection with experience in **42 states**, in communities ranging in population from 1,000 to 3,000,000. Since our establishment in 2009, more than 40% of our clients are repeat clients showing a high level of satisfaction with our work. We encourage you to call any of our previous clients. Surveys of our clients show that 94% rate their overall experience with our firm as **Outstanding** and indicate that they plan to use our services or highly recommend us in the future.

Delivering the Best: We conduct comprehensive **due diligence** on candidates. Our state-of-the-art process, includes extensive use of **social media** for candidate outreach and video interviews with potential finalist candidates, ensure a successful recruitment for your organization. Our high quality, thorough Recruitment Brochure reflects the knowledge we will have about your community and your organization and will provide important information to potential candidates. Additionally, before we recommend a candidate to you, we will have interviewed them via video, conducted reference calls, and news media and social media searches. Our knowledge of local government ensures that we can ask probing questions that will verify their expertise.

A Partner from Start to Finish: We are your partners in this important process. You are welcome to review all the resumes we receive, and we will share our honest assessment of the candidates. Our goal is your **complete satisfaction**. We can strategize with you on a variety of approaches for meeting your recruiting needs, including evaluation of internal candidates, identification of non-traditional candidates who meet your recruitment requirements, succession planning and mentoring options. We are committed to working with you until you find the candidate that is the best fit for your position.

Services for Any Budget and Any Search: We strive to meet the specific needs of our clients. We offer several options for recruitment services to meet your needs and your budget. Our services range from Full Executive Recruitments to Virtual Recruitments and even simply Professional Outreach for those who want to reach a broader network. In the following proposal, we have provided the scope we believe that best fits your needs. However, you may find all our services [here on our website](#).

Our Team

GovHR employs a team of professionals with backgrounds in local government and the not-for-profit sector. With your staff needs in mind and due to the significance of this recruitment, we have assigned our highly knowledgeable Vice President Alan Rosen. He will act as your project manager and primary point of contact for this project, and he will be assisted with administrative tasks and reference checks by a home office Recruitment Coordinator and a Reference Specialist. GovHR President Heidi Voorhees will assist and advise Mr. Rosen on the search process, as needed. Mr. Rosen's biography is attached to this proposal and his contact information is:

Alan Rosen
Vice President, GovHR USA
Minneola, FL
954-644-9999
Arosen@GovHRusa.com

Prior to joining GovHR, Mr. Rosen served as the County Manager of Lake County, Florida, and before that as the Interim City Manager in Port Orange. Mr. Rosen has more than seventeen years of experience in the public sector, and is well versed in Florida's Sunshine Law and Public Records laws. He is currently working with Ms. Voorhees on the Chief Assessment Officer recruitment for Allegheny County, Pennsylvania, and has the time necessary to devote to the City Manager recruitment for Fernandina Beach.

References

We are a proven leader in public sector consulting. ***More than one-third of the organizations served by GovHR are repeat clients.*** Our team provides a growing pool of highly qualified candidates who are well-suited to handle the challenges and expectations of professional positions in local government and the not-for-profit sector. The following references can speak to the quality of service provided by GovHR.

Pinellas County, FL (Assistant County Administrator, 2020)
(Director of Building & Development Review Services, 2022)
(Director of Office Management and Budget, 2021)
(Human Resources Director, 2020)
(Deputy County Administrator, 2019)
Barry Burton, County Administrator
727-464-3485
bburton@pinellascounty.org

Deerfield Beach, FL (Assistant City Manager, 2022)
(Director of Parks and Recreation, 2021)
Dave Santucci, City Manager
954-480-4263
dsantucci@deerfield-beach.com

1

Lakeland FL (City Manager, 2020)

Bill Mutz, Mayor

863-834-6000

Bill.Mutz@lakelandgov.net

GovHR has conducted more than 300 Executive Manager recruitments (City Manager, County Manager, etc.) since the firm's inception in 2009. A list of these recruitments for the past 3 years is included with this proposal, along with a list of all of GovHR's recruitments in the State of Florida. We would be happy to provide you with additional contact information for any of these clients upon request.

Project Approach and Methodology

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

Phase I: Position Assessment, Position Announcement & Brochure

GovHR treats each executive recruitment as a transparent partnership with our client. We believe in engaging with stakeholders early in each recruitment process to fully understand the challenges and opportunities inherent in the position. Understanding the organizational culture is critical to a successful recruitment. We gain this insight and information through meetings (one on one and small groups), surveys and a review of relevant information. This information is reflected in a polished marketing piece that showcases the organization and the area it serves.

Information Gathering:

- One-on-one or group interviews with stakeholders identified by the client.
- GovHR can establish a dedicated email address for feedback from stakeholders or the community.
- Community forums (In-person or via video) can be used to gather input and feedback.
- Surveys can be used for department personnel and/or the community to gather feedback.
- Conversations/interviews with department heads.

A combination of the above items can be used to fully understand community and organizational needs and expectations for the position (this proposal includes 12 hours of meetings – additional meetings can be added for a fee of \$125/hours plus actual expenses if incurred. Dedicated email address and one organizational survey are included. Community Survey can be conducted for \$2,500. Community Forums can be conducted as an optional service.

Development of a **Position Announcement** to be placed on websites and social media.

Development of a thorough **Recruitment Brochure** for client review and approval.

Agreement on a detailed **Recruitment Timetable** – a typical recruitment takes between 90 to 120 days from the time you sign the contract to appointment of the finalist candidate.

Phase II: Advertising, Candidate Recruitment & Outreach

We make extensive use of social media as well as traditional outreach methods to ensure a diverse and highly qualified pool of candidates. In addition, our website is well known in the local government industry – we typically have 14,000+ visits monthly to our website and career center. Additionally, our weekly jobs listings are sent to over 7,000 subscribers.

Phase II will include the following:

- GovHR consultants will personally identify and contact potential candidates.
- Develop a database of potential candidates from across the country unique to the position and to the Client, focusing on:
 - Leadership and management skills
 - Size of organization
 - Experience in addressing challenges and opportunities also outlined in Phase I
 - The database will range from several hundred to thousands of names and an email blast will be sent to each potential candidate.
- Placement of the Position Announcement in appropriate professional online publications:
 - Public sector publications & websites (approximately 20 online sources)
 - Social media: LinkedIn (over 20,000 connections), Facebook, Instagram and Twitter
 - GovHR will provide you with a list of advertising options for approval

Phase III: Candidate Evaluation & Screening

Phase III will include the following steps:

- Review and evaluation of candidates' credentials considering the criteria outlined in the Recruitment Brochure
- Candidates will be narrowed down to those candidates that meet the qualification criteria
- Candidate evaluation process:
 - Completion of a questionnaire explaining prior work experience
 - Live Video Interview (45 minutes to 1 hour) conducted by consultant with each finalist candidate
 - References provided by the candidate are contacted
 - Internet/Social Media search conducted on each finalist candidate

All résumés will be acknowledged and inquiries from candidates will be personally handled by GovHR, ensuring that the Client'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 will prepare a Recruitment Report presenting the credentials of those candidates most qualified for the position.
- GovHR will provide an electronic recruitment portfolio which contains the candidates' materials along with a "mini" résumé for each candidate so that each candidate's credentials are presented in a uniform way.
- Client will receive a log of all applicants and may review résumés if requested.

- Report will arrive in advance of the Recruitment Report Presentation.

GovHR will spend approximately 2 hours with the Client reviewing the recruitment report and providing additional information on the candidates.

Phase V: Interviewing Process & Background Screening

Phase V will include the following steps:

GovHR will:

- Develop the first and second round interview questions for your review and comment
- Coordinate candidate travel and accommodations
- Provide you with an electronic file that includes:
 - Candidates' credentials
 - Set of questions with room for interviewers to make notes
 - Evaluation sheets to assist interviewers in assessing the candidate's skills and abilities

Background screening will be conducted along with additional references contacted:

GovHR USA Background Screening	
✓ Social Security Trace & Verification	✓ County/Statewide Criminal
✓ U.S. Federal Criminal Search	✓ Civil Search
✓ Enhanced Verified National Criminal	✓ Bankruptcy, Leans and Judgements
- National Sex Offender Registry	✓ Motor Vehicle Record
- Most Wanted Lists FBI, DEA, ATF, Interpol	✓ Education Verification – All Degrees Earned
- OFAC Terrorist Database Search	Optional: Credit Report – Transunion with score (based on position and state laws)
- OIG, GSA, SAM, FDA	Optional:
- All felonies and misdemeanors reported to the National Database	Professional License Verification
	Drug Screen
	Employment Verification

GovHR will work with you to develop an interview schedule for the candidates, coordinating travel and accommodations. GovHR consultants will be present for all the interviews, serving as a resource and facilitator.

GovHR will coordinate a 2-Step Interview process. The first round interviews will include four to five candidates. The second round interviews will include two or three candidates. GovHR will supply interview questions and an evaluation form.

In addition to a structured interview, the schedule can incorporate:

- Tour of Client facilities
- Interviews with senior staff

Phase VI: Appointment of Candidate

- GovHR will assist you as much as you request with the salary and benefit negotiations and drafting of an employment agreement, if appropriate.
- GovHR will notify all applicants of the final appointment, providing professional background information on the successful candidate.

Project Timeline

Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11	Week 12	Week 13	Week 14
Phase I		Phase II				Phase III			Phase IV	Phase V		Phase VI	

Weeks 1 & 2	Phase 1: Interviews & Brochure Development
Weeks 3 thru 6	Phase 2: Advertising, Candidate Recruitment & Outreach
Weeks 7 thru 9	Phase 3: Candidate Evaluation & Background Screening
Week 10	Phase 4: Presentation of Recommended Candidates
Week 11 & 12	Phase 5: Interview Process & Additional Background Screening
Weeks 13 & 14	Phase 6: Appointment of Candidate

Commitment to Diversity, Equity & Inclusion in Recruitments

GovHR has a long-standing commitment to Equity, Diversity and Inclusion in all of our recruitment and selection processes. Since our firm's inception we have supported, with our time and financial resources, organizations that advance women and other underrepresented minorities in local government. These include the National Forum for Black Public Administrators, the Local Government Hispanic Network, The League of Women in Government and CivicPride.

GovHR Team Members have moderated and spoken on DEI initiatives at the International City and County Management Association conference and state conferences in Illinois, Michigan, Wisconsin, and North Carolina. Our employees and consultants have undergone Implicit Bias Training and we are frequent speakers on incorporating DEI values into recruitment and selection processes. We have a list of DEI resources on the front page of our website (<https://www.govhrusa.com/diversity-equity-and-inclusion-resources/>) that can be accessed by anyone who visits our website.

GovHR has formally partnered with the National Forum for Black Public Administrators' consulting arm, i4x, in several recruitment and selection processes throughout the country including Toledo, OH, Fort Collins, CO, Ann Arbor, MI, Oakland, MI and Arlington, TX. Our partnership reflects our mutual commitment to advancing DEI values and increasing the diversity of local government leaders at the

highest levels of local government organizations. We can provide you with an estimate for additional fees if the City would like to include i4x consultants on any of the City's recruitments.

Price Proposal

Summary of Costs: Full Scope	Price
Recruitment Fee:	\$20,500
Recruitment Expenses: (not to exceed) Expenses include candidate due diligence efforts	\$1,500
Advertising: Advertising costs over \$2,500 will be placed only with client approval. If less than \$2,500, Client is billed only for actual cost.	\$2,500
Total:	\$24,500*

**Consultant travel expenses are not included in the price proposal. If the consultant is requested to travel to the client, travel costs will be estimated at time of request. Only actual expenses will be billed to the client for reimbursement to GovHR.

Possible in-person meetings could include:

1. Recruitment brochure interview process
2. Presentation of recommended candidates
3. Interview Process

Any additional consultant visits requested by the Client (beyond the three visits listed above) will be billed at \$125/hour; \$500 for a half day and \$950 for a full day. The additional visits may also result in an increase in the travel expenses and those expenses will be billed to the client.

This fee does not include travel and accommodations for candidates interviewed.

Payment for Fees & Services

Professional fees and expenses will be invoiced as follows:

1st Invoice upon acceptance of proposal: 40% of the Recruitment Fee

2nd Invoice upon recommendation of candidates: 40% of the Recruitment Fee & expenses incurred to date

Final Invoice upon completion: 20% of the Recruitment Fee plus all remaining expenses

Payment of invoices is due within thirty (30) days of receipt (unless the client advises that its normal payment procedures require 60 days.)

The GovHR Guarantee

GovHR is committed to assisting our clients until a candidate is appointed to the position. Therefore, no additional professional fee will be incurred if the client does not make a selection from the initial group of recommended candidates and requests additional candidates be developed for interview consideration. If additional advertising beyond the Phase I advertising is requested, client will be billed for actual advertising charges. Reimbursable expenses may be incurred should the recruitment process require consultant travel to Fernandina Beach.

Upon appointment of a candidate, GovHR provides the following guarantee: should the selected and appointed candidate, at the request of the Client or the employee's own determination, leave the employ of the Client within the first 12 months of appointment, we will, if desired, conduct one additional recruitment for the cost of expenses and announcements only. This request must be made within 6 months of the employee's departure.

Contract Signature Page

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

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

Fernandina Beach, Florida agrees to retain GovHR USA, LLC ("GovHR") to conduct a City Manager Recruitment in accordance with its proposal dated March 22, 2023. The terms of the proposal are incorporated herein and shall become a part of this contract.

ACCEPTED:

Fernandina Beach, Florida

By: _____

Title: _____

Date: _____

Billing Contact: _____

Billing Contact Email: _____

GovHR USA, LLC

By: _____

Title: _____

Date: _____

Optional Services

GovTemps USA

Need an Interim? GovTempsUSA, a subsidiary of GovHR USA, specializes in the temporary placement of positions in local government. The firm offers short-term assignments, in addition to long-term and outsourced arrangements. Our placement professionals at GovTempsUSA have typically enjoyed distinguished careers in local government and displayed a commitment to public service throughout their career.

Recorded One-Way Video Interview of Candidates

Candidates we recommend for your consideration can complete a one-way video interview with 3 to 5 questions that will be recorded and which you can review electronically at your convenience. This can occur prior to making your decision on which candidates to invite for an interview. Cost \$100 per candidate.

Leadership/Personality Testing

GovHR has experience working with a wide variety of leadership and personality assessment tools, depending on the qualities and experiences the client is seeking in their candidates. These include but are not limited to Luminaspark, Caliper, DISC and others. Depending on the evaluation type selected fees can range between \$100 to \$500 per candidate.

360° Evaluation

As a service to the Client, we offer the option to provide you with a proposal for a 360° performance evaluation for the appointed position at six months into his or her employment. This evaluation will include seeking feedback from both elected officials and department directors, along with any other stakeholder the Client 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 will prepare a proposal for this service.



ALAN ROSEN



Alan Rosen has over seventeen years of local government management experience.

After receiving his BA in Psychology and MPA in local government management from the University at Albany, Alan began his career as a Senior Budget and Management Analyst for Broward County, FL. This experience included financial analysis, forecasting, budgeting, process improvement, performance measurement, and strategic planning.

Mr. Rosen continued to use his skills in other positions including Financial Systems Manager for Fulton County, GA; Budget Manager for Washoe County, NV; Senior Management Advisor for Management Partners; Assistant City Manager and Interim City Manager for Port Orange, FL; and more recently as County Manager for Lake County, FL.

Mr. Rosen has significant experience with emotional intelligence coaching and training, and is currently working on his certification as a 5-Archetypes method coach. He is adept at creating more efficient and effective processes in local government, which has saved governments millions of dollars and thousands of hours of staff time. Some of his recent projects include an HR/Payroll Audit for the City of Groveland, FL; an emotional intelligence training for the City of Dade City, FL; and an organizational analysis for the Pinellas County, FL Facilities Department.

Mr. Rosen is the author of several articles in ICMA's PM magazine. He is a member of both the Florida City and County Management Association (FCCMA) and the International City/County Management Association (ICMA). Alan is also an ICMA Credentialed Manager.

PROFESSIONAL EDUCATION, TRAINING & INSTRUCTION

- ICMA Credentialed Manager
- Master in Public Administration from Rockefeller College
- Bachelor of Arts in Psychology from University of Albany—State University of New York
- Essential Management Skills Certificate (ICMA)
- LEAN Process Improvement & Advanced Facilitation
- Six Sigma Yellow Belt

MEMBERSHIPS AND AFFILIATIONS

- International City/County Management Association
- Florida City/County Management Association

PROFESSIONAL BACKGROUND

Over 17 Years of Local Government Experience

- County Manager, Lake County, FL
- Interim City Manager, Port Orange, FL
- Assistant City Manager, Port Orange, FL
- Budget Manager, Washoe County, NV
- Financial Systems Manager, Fulton County, GA
- Senior Budget and Management Analyst, Broward County, FL



City and County Management (2019 - Present)

STATE	CLIENT	POSITION	POPULATION	YEAR
Alaska	Bethel	City Manager	6,500	2019
	Homer	City Manager (Professional Outreach)	5,300	2019
	Seward	City Manager	2,693	2019
Arizona	Buckeye	City Manager	69,744	2021
Colorado	Adams County	County Manager	519,572	2022
	Englewood	City Manager	34,957	2019
	Larimer County	County Manager	359,066	2022
Connecticut	East Hampton	Town Manager	13,000	2019
	Enfield	Town Manager	45,246	2021
	Manchester	General Manager	59,710	2021
Florida	Deerfield Beach	Assistant City Manager	80,000	2022
	Escambia County	County Administrator	321,905	2022
	Gainesville	Assistant City Manager	133,997	2021
	Lakeland	City Manager	110,000	2020
	Palm Beach	Assistant City Manager	85,933	2021
	Pinellas County	Assistant County Administrator	970,600	2020
		Deputy County Administrator/Chief of Staff	970,600	2019
	Walton County	County Administrator	75,305	2022
Georgia	Albany	City Manager	77,434	2021
Illinois	Centralia	City Manager	13,000	2020
	Crest Hill	City Administrator	21,169	2021
	Decatur	Deputy City Manager	76,178	2019
	Forsyth	Village Administrator	3,490	2021
	Fox Lake	Village Administrator	10,550	2021
	Galesburg	City Manager	33,706	2022
	Geneseo	City Administrator (Virtual)	6,500	2019
	Greenville	City Manager	7,000	2021
	Homewood	Assistant Village Manager (Virtual)	19,464	2021
	La Grange	Village Manager	15,610	2022
	La Grange Park	Assistant Village Manager	13,579	2020
	Lake County	County Administrator	703,462	2019
	Lake Forest	Assistant City Manager (Professional Outreach)	19,375	2022
	Mundelein	Village Administrator	31,385	2020
	Niles	Village Manager	30,001	2021
	North Chicago	Chief of Staff	30,020	2021
	Northbrook	Village Manager	35,000	2021
	Oak Brook	Village Manager	8,058	2021
	Oak Park	Assistant Village Manager/Human Resources Director	52,000	2019

		Village Manager	52,000	2021
	Orland Park	Village Manager	60,000	2019
	Palos Heights	City Administrator (Virtual)	12,480	2021
	Peoria	Assistant City Manager	115,234	2021
	Pingree Grove	Village Manager	10,000	2020
	Plainfield	Village Administrator	41,734	2021
	Princeton	City Manager	7,700	2019
	River Forest	Village Administrator	11,635	2021
	Rock Island	City Manager	39,684	2021
	Savoy	Village Administrator (Virtual)	8,607	2020
	Schaumburg Township	Township Administrator (Virtual)	140,000	2021
	St. Clair Shores	Assistant City Manager (Professional Outreach)	59,984	2021
	Sycamore	City Manager (Professional Outreach)	18,557	2021
	Tazewell County	County Administrator	135,394	2022
	Vernon Hills	Village Manager	25,911	2021
	Villa Park	Assistant Village Manager (Virtual)	22,038	2021
		Village Manager	22,038	2022
	Washington	City Administrator	15,700	2021
	Wauconda	Village Administrator	14,125	2021
	Willowbrook	Village Administrator	8,967	2019
	Winnetka	Assistant Village Manager	12,417	2019
Indiana	St. John	Town Manager (Professional Outreach)	18,047	2020
Iowa	Indianola	City Manager	15,833	2022
	Knoxville	City Manager	7,300	2021
	Marion	Deputy City Manager	30,000	2022
	Muscatine	City Administrator	23,819	2020
	Windsor Heights	City Administrator	4,860	2019
Kentucky	Paducah	City Manager	24,850	2021
	Paris	City Manager	9,846	2021
Maine	Bangor	City Manager	33,039	2021
Maryland	Sykesville	Town Manager	3,941	2019
	Westminster	City Administrator	18,522	2021
Massachusetts	Brookline	Assistant Town Administrator - Finance (Virtual)	58,732	2022
	Williamstown	Town Manager	7,806	2021
Michigan	Charlotte	City Manager	9,100	2020
	Clawson	City Manager	11,946	2021
	Eastpointe	City Manager	32,673	2019
	Ferndale	City Manager	20,428	2019
	Kalamazoo County	County Administrator	265,066	2022
	Lincoln Park	City Manager	36,665	2019
	Ottawa County	County Administrator	296,200	2021
	Rochester	City Manager	13,017	2022
	Royal Oak	City Manager	59,112	2020
	Royal Oak Township	Township Manager	2,600	2021
	Troy	Assistant City Manager	83,181	2019
Minnesota	Becker	City Administrator	4,874	2021

	Buffalo	Assistant City Administrator	15,855	2021
	Hibbing	City Administrator	15,855	2021
	Minnetonka	City Manager	53,953	2022
	St. Louis Park	City Manager	48,662	2021
	Waconia	City Administrator	13,500	2021
Missouri	Ballwin	City Administrator	30,181	2020
	Cape Girardeau	City Manager	38,000	2020
	University City	Assistant City Manager	35,172	2020
		Assistant to the City Manager/Director of Human Resources	35,172	2020
	Warrensburg	City Manager	20,200	2021
	Webster Groves	City Manager	22,800	2020
	Wildwood	City Manager	35,524	2019
Nevada	Boulder City	City Manager	16,207	2021
New Hampshire	Portsmouth	City Manager	21,796	2019
New York	Long Beach	Deputy City Manager (Virtual)	33,275	2021
				2022
	Mamaroneck (Town)	Town Administrator	29,156	2021
	Scarsdale	Village Manager	17,837	2021
North Carolina	Fayetteville	Assistant City Manager	210,000	2022
North Dakota	Minot	City Manager	45,700	2020
Pennsylvania	Centre County	County Administrator	158,172	2022
	Ferguson Township	Township Manager	18,300	2022
Texas	Austin	Assistant City Manager	885,000	Total
	McKinney	Assistant City Manager	191,645	2019
	Missouri City	Assistant City Manager	74,139	2019
		City Manager	74,139	2021
Vermont	Winooski	City Manager	7,997	2022
Virginia	Chesapeake	City Manager	245,000	2019
	Portsmouth	City Manager	96,000	2020
	Salem	City Manager	25,643	2019
	Virginia Beach	City Manager	442,707	2019
Washington	Burien	City Manager	52,066	2022
	Duvall	City Administrator (POS)	8,090	2021
	Yakima	Assistant City Manager	97,000	2021
West Virginia	Bridgeport	City Manager	8,582	2019
				2021
Wisconsin	Adams County	County Manager/Administrative Coordinator	20,220	2021
	Baraboo	City Administrator	12,048	2019
	Bayside	Assistant Village Manager	4,400	2019
	Beaver Dam	City Administrator	16,291	2021
	Beloit (Town)	Town Administrator	7,083	2020
	Franklin	Director of Administration	36,155	2019
	Harrison	Village Manager	13,185	2021
	Monroe	City Administrator	10,827	2020
	Plymouth	City Administrator/Utilities Manager	8,540	2020

	Port Washington	Assistant City Administrator/Human Resources Director	11,250	2022
	Whitewater	City Manager	14,300	2022



Florida Client List

STATE	CLIENT	POSITION	POPULATION	YEAR
Florida	Alachua County	Court Services Director (Virtual)	263,496	2018
		Human Resources Director	263,496	2017
	Broward County	Facilities Maintenance Director	1,954,000	2021
	Broward County Public Schools	Chief Fire Official	Multi	2021
	Broward County Sheriff's Office	Director of Information Technology	1,900,000	2022
	Deerfield Beach	Assistant City Manager	80,000	2022
		Assistant Senior Services Director	80,000	2016
		Director of Parks and Recreation	80,000	2021
		Purchasing Manager	80,000	2022
	DeFuniak Springs	Finance Director	7,000	2022
	Escambia County	County Administrator	321,905	2022
	Gainesville	Assistant City Manager	133,997	2021
		Director, Department of Sustainable Development	133,997	2021
		Fire Chief	133,997	2020
	Hillsborough Area Regional Transit Authority	Chief Executive Officer	1,500,000	2020
	Lakeland	City Manager	110,000	2020
	Largo	Assistant City Manager	82,244	2018
		Director of Public Works	82,244	2018
	Marion County	County Administrator	337,362	2015
	Orlando	Fire Chief	307,573	2021
		Public Works Director	307,573	2022
	Palm Beach	Assistant City Manager	85,933	2021
	Pasco County	County Administrator	475,502	2016
	Pinellas County	Assistant County Administrator	970,600	2020
		Deputy County Administrator/Chief of Staff	970,600	2019
		Director of Building & Development Review Services	970,600	2022
		Director of Human Resources	970,600	2020
		Director of Office of Management and Budget	970,600	2021
	Pinellas Park	Chief Technology Officer	52,137	2019
	Riviera Beach Community Redevelopment Agency	Executive Director	35,000	2020
	Tampa Bay Water	Chief Science Officer	Multi	2021
		Director of Information Technology	Multi	2021
		Human Resources Director	Multi	2022
	Walton County	County Administrator	75,305	2022

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

 X Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

 The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

 The person or affiliate was placed on the convicted FIRM list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted FIRM list. (Please attach a copy of the final order.)

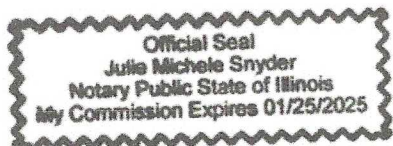
 The person or affiliate has not been placed on the convicted FIRM list. (Please describe any action taken by, or pending with, the Department of General Services.)


Signature _____ Date: March 23, 2023

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF ~~FLORIDA~~ Illinois
COUNTY OF Lake

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23rd day of March, 2023, and is personally known to me, ~~or has provided~~
Julie Michelle Snyder as ~~identification~~



Julie Michelle Snyder

Notary Public
My Commission expires: 1/25/2025

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "C"

DRUG-FREE WORKPLACE CERTIFICATION

The below-signed INDIVIDUAL/FIRM certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

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

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: GovHR USA

CITY: Northbrook STATE: IL ZIP CODE: 60062

SIGNATURE:  PHONE: 847-380-3240

NAME (TYPED OR PRINTED): Judith Schmittgens TITLE: Corporate Secretary

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: 23-07

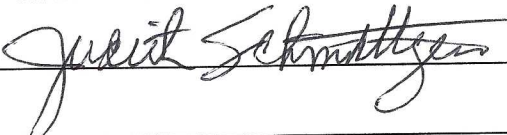
Project Description: City Manager Executive Search Services

I/FIRM acknowledges and agrees to the following:

I/FIRM shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the FIRM during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the FIRM to perform work pursuant to the contract with the Department.

Individual/Company/Firm: GovHR USA

Authorized Signature: 

Title: Corporate Secretary

Date: March 23, 2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or firm presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document. No exceptions.

1. INTRODUCTION AND GENERAL INFORMATION
 Understands and agrees to all terms.
2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
 Understands and agrees to all terms.
3. EVALUATION AND CONTRACT OVERVIEW
 Understands and agrees to all terms.
4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
 Understands and agrees to all terms.
5. PROPOSER'S RESPONSE: PROPOSED TEAM
 Understands and agrees to all terms.
6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
 Understands and agrees to all terms.

Name: Judith Schmittgens Title: Corporate Secretary

Signature:  Date: March 23, 2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for City Manager Executive Search Services

This sworn statement is submitted by (entity) GovHR USA whose business address is 630 Dundee Rd., #225, Northbrook, IL 60062 and (if applicable) Federal Employer Identification Number (FEIN) is 27-0598897 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Judith Schmittgens and my relationship to the entity named above is Corporate Secretary.

1. The above-named entity is submitting a Proposal for the City of Fernandina Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Fernandina Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Fernandina Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Fernandina Beach.



Signature Date: March 23, 2023

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

STATE OF ~~FLORIDA~~ Illinois
COUNTY OF Lake

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23rd day of March, 2023, and is personally known to me, ~~or has provided~~ as identification
Julie Michelle Snyder

Julie Michelle Snyder My Commission expires: 1/25/2-25
Notary Signature



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for City Manager Executive Search Services

This sworn statement is submitted by (entity) GovHR USA whose business address is 630 Dundee Rd., #225, Northbrook, IL 60062 and (if applicable) Federal Employer Identification Number (FEIN) is 27-0598897 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Judith Schmittgens and my relationship to the entity named above is Corporate Secretary.

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Fernandina Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.


Signature

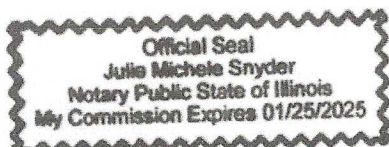
March 23, 2023

Date:

STATE OF ~~FLORIDA~~ Illinois
COUNTY OF Lake

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 23rd day of March, 2023, and is personally known to me, ~~as~~ has provided Julie Michelle Snyder ~~as identification~~.

 My Commission expires: 1/25/2025
Notary Signature



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "H"
DISPUTES DISCLOSURE FORM

Answer the following questions by placing as "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?
YES ___ NO X _____

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?
YES _____ NO X _____

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?
YES _____ NO X _____

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Fernandina Beach.

GovHR USA

March 23, 2023

Firm

Date


Authorized Signature

Judith Schmittgens, Corporate Secretary

Printed or Typed Name and Title

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



Response to RFP# 23-07

City Manager Executive Search Services

Form Proposal

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Our Method

The Spirit Consulting Way: Tailored Project Management

The *Spirit Consulting Way* is a tailored project management approach that allows us to follow a proven process, resulting in incredible success for you and your organization's next hire. By structuring our projects this way, you are given the freedom to pay for results as opposed to time.

Your investment is broken down into three payments, aligned with our three stages, and each predicated upon a successful deliverable:

- **Strategy** – Agreed upon statement of work
- **Execution** – After you interview two or more candidates
- **Close** – Signed offer letter and confirmed start date.

You are going to love the success of the new City Manager that we hire for you, and you will rest easy with a **guarantee that is twice as long as the industry standard.**



Phase I: Strategy

INITIAL CONSULTATION

Each project begins with an intake meeting that includes the Board/Search Committee, SC Executive Team Member, and SC Project Lead. For this prospective engagement, we would hold this meeting within 7 days of the Go-Live date of any resulting contract. At this stage, we would coordinate all required one-on-one meetings with the Mayor and City Commissioners, as well as meet with the Citizens Committee. This step in the process consists of spending time onsite with our clients to build the framework for a successful search by conducting a thorough stakeholder analysis to include board members, employees, interested community members, and business leaders. Our meeting focus is on understanding our client's operations and objectives,

culture, and the technical requirements of the role. We also want to define the dimensions for job success, specific experiences, competencies, knowledge, and personal characteristics required to build a thorough candidate pipeline.

FLORIDA SUNSHINE LAWS

As an organization that works with multiple clients in various states, we understand how laws and regulations differ, and we ensure to take account for these differences. Previously, we have worked with Florida-based organizations such as the Early Learning Coalition of Hillsborough County (ELCHC) and the Early Learning Coalition of Southwest Florida (ELCSWFL), both of which required operating in the Sunshine. We conducted CEO searches for both these organizations in the past five months, allowing us to refresh our knowledge on the Florida Sunshine Laws. Both of these successful searches were in alignment with all the Florida Sunshine laws and regulations. To learn more about the success we have accomplished in Q4 2022 for ELCHC and in Q1 2023 for ELCSWFL, you can watch video testimonials [here](#) or [here](#).

STATEMENT OF WORK

Prior to commencing the recruiting/interviewing on each search, we take the information gathered from the intake meeting and stakeholder analysis to create a customized Statement of Work, which includes our service level agreement, competitor and target research, a sample candidate matrix, and drafts of the search overview and timeline, role description, and interview questionnaire. A sample statement of work can be seen [here](#).

The Statement of Work includes a **service level agreement**, which aims to improve efficiency and service delivery in the executive search services provided by SC. This document outlines expectations from both the client organization and SC and increases communication throughout the process.

Within the Statement of Work, we provide **competitor and target research** – a sampling of the companies and organizations we might source candidates from for our client. SC will work with the client organization to identify a target market for pursuing candidates with the appropriate skill mix and educational background.

Prior to submitting a candidate presentation, we discuss qualifications and requirements of the role with our clients. We transpose this information into a **candidate matrix** – a table that allows our clients to see a side-by-side comparison of how each candidate compares to one another. These matrices are an essential part of our submission of candidates for consideration and are accompanied by candidate talking points to provide a summary of candidates' backgrounds, experience, and notable qualifications as well as our recommendations.

The **search overview** is a document that is generated from our project management software. It is a detailed, step-by-step guide that leads a search committee through an executive search process. To successfully complete an engagement within the proposed timeline, one of the biggest challenges is keeping everyone aligned and held accountable. Our search overviews allow a hiring manager the ability to plan each step along the way.

Additionally, we help our clients by recreating their **role descriptions**. We typically find that the versions we receive from our clients do not possess the right information, or they provide too much of the wrong information. While drafting our role descriptions, we make sure that we detail the company, summarize the role, and concisely list requirements, responsibilities, goals, and key challenges of the position. This is included within our statement of work to ensure that the position has been outlined correctly and it can be signed off and approved by all involved.

Once the role description has been developed, we will create an **interview questionnaire** that is composed of traditional and behavioral-based questions. Our traditional questions are asked in all our engagements and have been perfected over many years of recruiting. The second portion of our interview guides consist of

behavioral based interview questions. We feel the most accurate predictor of future performance is past performance, and we extract this information from candidates.

Phase II: Execution

ADVERTISING

To find the perfect candidate, we follow a well-rounded approach that focuses on both advertising and passive-talent recruiting. We follow this method to ensure that all job postings are easily accessible to the public to further job equality. During our stakeholder analysis, we learn more about our client and their goals for this position, which allows us to identify the best platforms on which to post the job description & application. For this City Manager position, we would be advertising on our standard portals via LinkedIn, Zip Recruiter, and our own website, as well as alternative channels that are identified through the intake process. For example, another potential advertising method includes working with local associations to disseminate the job information, including but not limited to the International City/County Management Association, the Florida League of Cities, the Florida City and County Management Association and more.

CHANNELS OF SOURCING

Successful identification of exceptional talent requires active investigation and direct recruitment. Passive talent candidates are focused on driving results for their organizations, so to reach them, you must cut through the chaos of daily operations. We do so by leveraging the database we have built over the past 20 years and heavily focusing on cold outreach via LinkedIn, email, and phone/text, as well as utilizing artificial intelligence, paired with intelligence platforms, to automate candidate follow up. Further contacts are made through leveraging our network of professionals and former candidates for referrals. In 2022, 86% of our placed candidates came from the passive talent market, meaning our clients chose candidates we generated instead of ones that applied to job postings. We have consistently found that it is crucial to have a robust recruitment strategy rather than rely solely on candidates that apply through job postings in order to have the most competitive pool possible.

CANDIDATE CONFIDENTIALITY

As we typically work predominantly with candidates with active employment, confidentiality is an area of strength for Spirit Consulting. We store candidate information only in our ATS and only disseminate this information to the hiring client. By keeping candidate information secure within a password protected platform available only to our firm, we have successfully avoided any lapses in confidentiality.

CANDIDATE SCREENING

We carefully screen and qualify all potential candidates to assess their qualifications, potential to perform within the new environment, and organizational compatibility. As potential candidates are identified, they are taken through an internal round of assessments prior to presentation. This initial pre-screen process allows us to pre-approve candidates and make stronger recommendations on which to consider. Additionally, we place heavy importance on discussing compensation in these early conversations to determine the candidate's willingness to accept an offer prior to submitting them for consideration. These screens include conducting reference, education, criminal, financial, media and civil litigation checks to present candidates who are the most qualified and best suited for consideration by your search committee.

PRESENTING CANDIDATES

After screening candidates, we send a [candidate presentation with interview notes](#), and resumes (hyperlinks provide samples for your review). The first slate of candidates is presented within 15 days of the search, and the second slate of candidates is presented within 30 days of the search. We then have a meeting with the client to discuss each recommended candidate's fit based on work experience, knowledge and skills, personal

attributes, competencies, leadership abilities, and cultural fit. We also detail any concerns that we may have about a candidate so that we can consult you in narrowing in on the pool of applicants.

CANDIDATE PRESENTATION MATRIX

We then walk through each candidate that we are presenting in [matrix form](#), as discussed above. This allows our clients to see a side-by-side comparison of how each candidate compares to one another based on the agreed upon qualifications uncovered during the initial consultation. You can see a sample candidate matrix [here](#).

SEARCH COMMITTEE INTERVIEW ASSISTANCE

We serve as collaborative advisors to our clients. If requested, we assist our clients with all final interviews and assessments, interview questions and candidate evaluation forms, and consult clients in ranking the candidates interviewed. SC has extensive experience working with a variety of search committees. We understand that some searches require extensive community involvement, and our team can adapt to the needs of all stakeholders involved in a search. During the last two CEO searches for the Early Learning Coalitions in Tampa and Fort Myers, we were able to maintain compliance with the Florida Sunshine Laws by having candidates interview during the regular board meeting cadence, which were open to the public. Offer negotiations were extended immediately following board interviews, and we created a similar schedule for you as identified and summarized in the search timeline below.

ENSURING A DIVERSE APPLICANT POOL

As a [Minority \(Latino\) Business Enterprise](#), Spirit Consulting uniquely values all that a multicultural workforce can offer. Therefore, we draw on our vast resources to find the best and brightest candidates while recruiting for and supporting our clientele. In looking at our diversity statistics for the past two years (graphs below), you can see that we averaged **73.48% diversity** in candidates presented, and **88.07% diversity** in candidates hired.

2021		
Demographics	Number Presented	% Presented Total
Men	110	42.80%
Women	147	57.20%
White	161	62.89%
Non-White	95	37.11%
Veteran	19	7.39%
Overall Diversity	176	68.48%
Undetermined	0	0.00%
Hired Demographics	Number Hired	% Hired Total

2022		
Demographics	Number Presented	% Presented Total
Men	69	43.67%
Women	89	56.33%
White	89	60.14%
Non-White	59	39.86%
Veteran	5	3.16%
Overall Diversity	124	78.48%
Undetermined	1	0.63%
Hired Demographics	Number Hired	% Hired Total

Men	11	57.89%
Women	8	42.11%
White	8	47.06%
Non-White	9	52.94%
Veteran	4	21.05%
Overall Diversity	17	89.47%
Undetermined	0	0.00%

Men	5	33.33%
Women	10	66.67%
White	9	60.0%
Non-White	6	40.00%
Veteran	1	6.67%
Overall Diversity	13	86.67%
Undetermined	0	0.00%

One of the [core values](#) of Spirit Consulting is Nobility; all people are created equal. This value is woven into who we are, so we treat others with the nobility they deserve and remain committed to hiring the **right leader** for each job.

Phase III: Close

INTEGRATING I/O PSYCHOLOGY TO THE EVALUATION PROCESS

Screening, interviewing, and hiring applicants can be a difficult and resource-heavy process. Typically, you have relatively little information on candidates during the hiring process and will spend little more than a few hours with them before making an offer. The additional information you receive from our psychological assessments about potential employees will help in the decision-making process *pre-hire* and will help maximize your new employee's success *post hire*, throughout the first year and beyond.

Before our clients interview candidates in-person, one of our Work Psychologist or Organizational Development Consultants administer a series of Hogan Leadership Assessments. The Hogan assessments help organizations by identifying characteristics that may impact an individual's job performance as well as his/her fit within a particular role, team, or organizational culture. The results of these assessments are summarized & shared with the hiring manager by our industrial/organizational psychologist prior to you in person interviewing candidates. A sample Hogan Assessment Summary can be seen [here](#). We ensure that you fully understand the information gathered from these Inventories so that you can make your hiring decisions with greater confidence. We implement these psychological assessments pre-hire as your partner in selecting, developing, and retaining individuals who will fit your organization's culture and can make lasting contributions to its goals. We become an extension of your team. We help you to meet your hiring needs and accomplish your goals by providing insight, objectivity, and accountability.

EXTENDING OFFERS

We can assist our clients in offer negotiations. Our strong experience in this stage of the process allows us to negotiate all components of the offer effectively and quickly. We counsel both sides with the compensation package, contractual issues, and other specific details of employment, including relocation. Between our experience and emphasis on discussing these details with candidates throughout the process, we are in an ideal position to counsel both candidate and client regarding any counteroffer the candidate's current employer may extend.

CANDIDATE ONBOARDING ASSISTANCE

Our service extends well beyond the finalized offer. We stay in close contact with all parties during the transition period to address any potential difficulties that may arise as well as to ensure a smooth transition; this occurs with reports at 30, 60, 90, and 180 days after placement. Your onboarding process will be conducted by Amie Rowe, Ph.D.

SEARCH TIMELINE

The following plan was customized and accommodated at your pre-established commission meetings. This timeline also gives our finalist City Manager adequate time to give notice to their current employer and relocate. Throughout your City Manager search, Spirit Consulting's staff will play a key role in working with you to determine what is needed to make this process successful and to work toward timely execution of tasks. **This is a proposed timeline** that provides an overview of the customized search process and may be modified to fit your recruitment needs and timeline.

Date	Day of the Week	Deliverable
04/4/23	Tuesday	City of Fernandina Beach (CFB) Awards Spirit Consulting
04/18/23	Tuesday	Contract Confirmed, Search Committee Intake Meeting, & Stakeholder Analysis Completed
04/21/23	Friday	Statement of Work Delivered
04/24/23	Monday	CFB Search Committee Signs Spirit Consulting's Statement of Work; Recruitment Commences
05/9/23	Tuesday	SC Emails Candidate Presentation I
05/16/23	Tuesday	Update Call #1 - Present Group I Candidates
05/17 – 05/26	Wednesday – Friday	Group I Interviews with CFB Commence
05/30/23	Tuesday	SC Emails Candidate Presentation II
06/06/23	Tuesday	Update Call #2 - Discuss Group I Interviews Present Group II Candidates
06/07 - 06/16	Wednesday - Friday	Selected Group I Finalists complete Hogan Assessments
06/07 - 06/16	Wednesday - Friday	Group II Interviews with CFB Commence
06/20/23	Tuesday	Update Call #3 - Discuss Group II Interviews
06/21 - 06/27	Wednesday - Tuesday	Selected Group II Finalists complete Hogan Assessments
06/29/23	Thursday	Update Call #4 - I/O Psychology Debrief
06/30 - 07/14	Friday - Friday	Holiday Break & Finalist In-Person Interviews
07/18/23	Tuesday	Update Call #5 - Discuss Finalist Interviews
07/19/23	Wednesday	CFB Extends Verbal Offer; Negotiation Begins
07/21/23	Friday	City Manager Employment Agreement Extended
07/24/23	Monday	City Manager Offer Accepted & Notice Period Begins
08/21/23	Monday	4 Weeks' Notice Period Ends

8/21/ - 9/01	Monday - Friday	Hired City Manager Relocates
9/04/23	Monday	HOLIDAY
9/05/23	Tuesday	Hired City Manager's First Day; Onboarding & Integration

Cost and Time

VENDOR: Spirit Consulting (“SC”) - **CLIENT:** City of Fernandina Beach (“CFB”)

TIME: The proposed search timeline by Spirit Consulting is 66 days from the time our recruitment begins to the date the City Manager executes the employment agreement.

COST: The total investment for the execution of this search is equal to 22.5% of the hired candidate’s first year total compensation for executive search services, plus 7.5% of the hired candidate’s first year total compensation for optional work psychology services. Total compensation is defined as annual base salary, annual bonus projected at the maximum amount, and sign-on bonus. It excludes benefits or relocation. All invoices are due Net 10.

- I. CFB will remit the first one-third of the total executive search fee and one-half of the work psychology services fee upon signing by both parties upon submittal of the SC work plan. The payment is a non-refundable retainer.
- II. CFB will remit a second non-refundable retainer installment of one-third of the executive search fee and one-fourth of the work psychology fee after presentation and acceptance of two or more candidates that CFB has moved forward in the interview process. Any and/or all three interview types (phone, video and/or in-person interview) will trigger the second non-refundable retainer installment.
- III. CFB will remit the remainder of the executive search and work psychology services fees after the successful candidate’s signing of an offer letter and mutually agreed upon start date or 70 days after execution of SC’s agreement; this final invoice will be triggered by either occurrence. The final portion of the executive search and work psychology fees will be adjusted based on actual compensation.

REIMBURSABLE EXPENSES: CFB will reimburse SC for all client-approved expenses incurred during the search, including but not limited to:

- I. SC employee travel expenses for interviews or search-related meetings including airfare, gasoline, meals, lodging, parking, tolls, taxi, or car rental.
- II. Candidate travel expenses for interviews with SC or CFB, including airfare, gasoline, meals, lodging, parking, tolls, taxi, or car rental.
- III. If a background check is required, CFB will be billed the cost. Fees will vary depending on the services requested.
- IV. CFB is responsible for payment of any CFB required job postings outside of Spirit Consulting’s proprietary methods.

PLACEMENT GUARANTEE: **Within the first 24 months of employment**, if the hired candidate is asked to leave for under-performance, provided there has not been a material change in the nature, location, or reporting structure of the position, we will relaunch a search for a new candidate under the original role specifications. In such a case, we will do so for no additional professional fee, though charging expenses as provided for in this original search. If the nature, location, or reporting structure has changed materially since we closed on the original hire, we will need to mutually agree on a revised role specification and a new fee structure. The 24-month guarantee requires utilization of work psychology services - not simply procuring the service.

WORK PSYCHOLOGY: Work Psychology Assessments are comprised of Hogan Assessments, with a write-up and consultations conducted after candidates’ initial interviews with client. Recruiting assessments are performed by a certified Industrial Organizational Psychologist. Onboarding & Integration services are performed by an Industrial Organizational Psychologist and occur at 30, 60, 90, and 180 days after placement.

WORK AGREEMENT AND CLIENT PARTICIPATION: SC will assist CFB to recruit, hire and onboard for the assigned positions. CFB gives SC permission to post these roles. If CFB decides to postpone a search after it has commenced, upon resumption of the search, a new fee arrangement may need to be mutually agreed between us.

ADDITIONAL HIRES: If any candidate submitted for CFB's consideration is subsequently hired for a position outside of this agreement within 12 months of the completion of this search, a fee will be due to SC. The fee for an adjunct hire of this type will be 20% of the candidate's first year's total compensation. Total compensation is defined as annual base salary, annual bonus projected at the maximum amount, and sign-on bonus. It excludes benefits or relocation.

CONFIDENTIAL INFORMATION:

SC Search Candidates are referred by SC to CFB in confidence. The fee is payable to SC should CFB or its affiliates engage a SC Search Candidate for any position within one year after our most recent documented communication relating to such SC Search Candidate. Should CFB refer or otherwise identify such a SC Search Candidate to an affiliated company or division, and the affiliated company or division hires the SC Search Candidate, CFB and the hiring company shall be responsible for the payment of the fee outlined above.

NON-SOLICITATION:

During the term of this Agreement, SC will not actively solicit, recruit, or hire any CFB employees for employment by SC for other recruiting purposes. In addition, SC will not actively solicit, recruit, or hire any Hired Candidate from the employment of CFB during the term of this agreement.

EXCLUSIVITY:

SC establishes an exclusive consulting agreement with its clients. We expect our clients not to advertise or to use a competing organization on the same engagement during the period of our involvement. Any internally generated candidates will be expected to engage and participate in Spirit Consulting's process. Unnecessary duplication puts all parties in a potentially embarrassing situation and may result in the downgrading of the position in the eyes of potential candidates. If such an event occurs, it is our policy to discontinue our search efforts immediately and to bill the full amount for the engagement.

INDEMNIFICATION:

Both parties mutually agree to indemnify and hold each other harmless from and against all liability, losses, damages, claims, causes of action, costs, or expenses (including reasonable attorneys' fees), which directly or indirectly arise from the performance of the Services hereunder by the indemnifying party, its agents, servants, representatives and/or employees.

References

Reference #1

Entity Name: Early Learning Coalition of Hillsborough County

Size of Organization (population, annual budget, number of employees): \$330MM, 155 Employees, 20K children & families served

Contact Person's Name: [Dr. Stephie Johnson](#),

Title: ELCHC Board Secretary

Address: 6302 E Dr Martin Luther King Jr Blvd Suite 100, Tampa, FL 33619

Phone Number: 813-334-3734 cell

Email Address: stephie@hecedu.com

Scope of Services: CEO Executive Search & Work Psychology Services

Video Testimonial: <https://youtu.be/Gy2jRu-MrU8>

Reference #2

Entity Name: Early Learning Coalition of Southwest Florida

Size of Organization (population, annual budget, number of employees): \$110MM, 64 Employees, 12K children & families served

Contact Person's Name: [Dr. Kelly Roy](#)

Title: Interim Board Chair

Address: 2675 Winkler Ave Ste. 300, Fort Myers, FL 33901

Phone Number: 239-244-4262

Email Address: kellyRKRoy@gmail.com

Scope of Services: CEO Executive Search & Work Psychology Services

Reference #3

Entity Name: Cancer Treatment Centers of America Phoenix & Great Expressions Dental Centers

Size of Organization (population, annual budget, number of employees): CTCA \$500MM, 5K employees, GEDC \$350MM, 3.2K Employees

Contact Person's Name: [Eric Magnussen](#)

Title: Chief Human Resources Officer for both organizations

Address: 29777 Telegraph Rd Ste 3000, Southfield, Michigan, 48034

Phone Number: 773-517-0912

Email Address: eric.magnussen@greatexpressions.com

Scope of Services: Executive Search & Work Psychology Services

Position Sampling: Chief Executive

Officer, Vice President of Patient Engagement, Vice President of Financial Planning & Analysis, Government Reimbursement Manager, Four (4) Director of Operations, Area Operations Manager Texas, Clinical Partner SW, Clinical Partner NE, Director of Credentialing, Vice President of National Pediatric Dentistry, Vice President of Marketing, Three (3) Regional Vice President of Operations

Video Testimonials:

- Eric Magnussen: <https://youtu.be/vCsEgwJfcZQ>
- Robert Davis: <https://youtu.be/mT7SHwVDeFo>
- Kyle Kingston: <https://youtu.be/9qsju4Yt-gw>
- Nasim Kasmikha: <https://youtu.be/ppmMHPBlgXY>

Reference #4

Entity Name: Brevard Public Schools (BPS)

Size of Organization (population, annual budget, number of employees): \$1.5B, 9k employees

Contact Person's Name: [Misty Belford-Haggard](#)

Title: Former Board Chair

Address: 2700 Judge Fran Jamieson Way, Viera, FL 32940

Phone Number: 407-474-4226

Email Address: mbelford@cfl.rr.com

Scope of Services: Dr. Mark Mullins led Brevard County Public Schools as Superintendent from 2018 – 2022 and was an administrator with Brevard County Public Schools since 2000. During this time, Dr. Mullins led the Brevard County Public School District and oversaw a \$1.527B budget. In December of 2022, Dr. Mullins stepped from his position within Brevard County Public Schools to leverage his 22 years of public schools administration experience to serve other organizations through consulting around the country. Dr. Mullins is our proposed executive search consultant to lead the strategy component of your City Manager search, and Dr. Mullins' former board chair for Brevard County Public Schools can attest to Dr. Mullins' execution capabilities.

Reference #5

Entity Name: Metropolitan Transit Authority

Size of Organization (population, annual budget, number of employees): 19.2B, 70K employees

Contact Person's Name: [Steven Dourdis](#)

Title: HR Business Partner

Address: Denver, CO

Phone Number: 954-661-6561

Email Address: sjdourdi@gmail.com

Scope of Services: Executive Search Services

Position Sampling: Our firm and five other executive search firms were hired to fill 48 leadership positions. Despite a politically charged environment while working collaboratively with 5 local executive search firms, Spirit Consulting was a leader on this assignment, filling 14 of the 26 positions on this transformation project.

Reference #6

Entity Name: Duke University & Health System

Size of Organization (population, annual budget, number of employees): \$6.78B, 65K Employees

Contact Person's Name: [Antwan Lofton](#)

Title: Vice President & Chief Human Resources Officer

Address: Durham, NC

Email Address: antwan.lofton@duke.edu

Scope of Services: 40 Leadership and Executive Searches, Organizational Development, Work Psychology, & Executive Coaching Services

Video Testimonial: <https://youtu.be/Un5bDAFdYW0>

Reference #7

Entity Name: The Indianapolis Airport Authority

Size of Organization (population, annual budget, number of employees): \$403MM, 280 employees

Contact Person's Name: [Mario Rodriguez](#)

Title: Executive Director

Address: 7800 Col. H. Weir Cook Memorial Dr, Indianapolis, IN 46241

Phone Number: 317-487-5550

Email Address: mrodriguez@ind.com

Position Sampling: Director of Concessions & Air Service

Scope of Services: Executive Search Services

Reference #8

Entity Name: Community & Economic Development Association of Cook County

Size of Organization (population, annual budget, number of employees): \$153MM, 500 employees

Contact Person's Name: [Adrian Soto](#)

Title: Board Member

Address: 567 W. Lake Street, Suite 1200, Chicago, IL 60661

Phone Number: (312) 420-1230

Email Address: siuasoto@gmail.com

Scope of Services: Chief Executive Officer, Chief Operating Officer Executive Search Services

Reference #9

Entity Name: Children's Hospital of Philadelphia

Size of Organization (population, annual budget, number of employees): \$3.4B, 16.8K employees

Contact Person's Name: [Fabian Stone](#)

Title: Vice President of Revenue Cycle

Address: 3401 Civic Center Blvd, Philadelphia, PA 19104

Phone Number: (267) 426-1888

Email Address: stonef@chop.edu

Scope of Services: Executive Search, Organizational Development, Work Psychology, & Executive Coaching Services

Video Testimonial: https://youtu.be/L6rtU1O_SdA

Reference #10

Entity Name: The City of San Antonio

Size of Organization (population, annual budget, number of employees): \$3.4B, 13K employees

Contact Person's Name: Joel Jenks

Title: Training Manager, former Executive Recruiter

Address: City Hall 100 Military Plaza San Antonio, TX 78205

Phone Number: 210-391-1248

Email Address: joel.jenks@sanantonio.gov

Scope of Services: Chief Innovation Officer, Director of Neighborhood & Housing Services, Affordable Housing Administrator, & Pedestrian Mobility Officer Executive Search Services

Exhibits

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "A"
CONTACT SHEET

Name: Jenna Haley

Federal Taxpayer ID: 82-2553593

Mailing Address: 1068 South Lewis Ave.

City, State, & Zip Code: Lombard, IL 60148

Telephone: 312-672-2288 **Fax:** 312-277-7592

Email: jhaley@spiritmco.com

Submitted By: Jenna Haley

Title: Junior Consultant

Accounting Contact:

Name: Christopher Gomez **Title:** Chief Executive Officer

Email Address: cgomez@spiritmco.com **Phone:** 312-672-2288

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "B"

SWORN STATEMENT UNDER F.S. SECTION 287.133(3) (A), ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07 City Management Executive Search Firm
2. This sworn statement is submitted by (entity) Spirit Consulting whose business address is 1068 South Lewis Ave. Lombard, IL 60148 and (if applicable) Federal Employer Identification Number (FEIN) is 82-2553593 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)
3. My name is Christopher Gomez and my relationship to the entity named above is Chief Executive Officer
4. I understand that a "public entity crime" as defined in Paragraph 287.133(a) (g). Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a) (b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime; or
 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Fernandina Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
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agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)
- ☒ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.
- ☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)
- ☐ The person or affiliate was placed on the convicted FIRM list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted FIRM list. (Please attach a copy of the final order.)
- ☒ The person or affiliate has not been placed on the convicted FIRM list. (Please describe any action taken by, or pending with, the Department of General Services.)



Signature

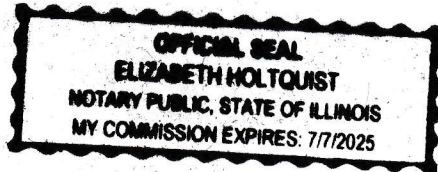
3/22/23

Date:

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF FLORIDA
COUNTY OF DuPage County, IL

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 22 day of March, 2023, and is personally known to me, or has provided an ID as identification.



Elizabeth Holtquist
Notary Public
My Commission expires: 7/7/2025

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "C"

DRUG-FREE WORKPLACE CERTIFICATION

The below-signed INDIVIDUAL/FIRM certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

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

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: Spirit Consulting

CITY: Lombard STATE: IL ZIP CODE: 60148

SIGNATURE:  PHONE: 312-672-2288

NAME (TYPED OR PRINTED): Christopher Gomez TITLE: Chief Executive Officer

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: RFP 23-07

Project Description: City Manager Executive Search Firm

I/FIRM acknowledges and agrees to the following:

I/FIRM shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the FIRM during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the FIRM to perform work pursuant to the contract with the Department.

Individual/Company/Firm: Spirit Consulting

Authorized Signature: 

Title: Chief Executive Officer

Date: 03/22/2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or firm presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document.

1. INTRODUCTION AND GENERAL INFORMATION
Understands and agrees to all terms.
2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
Understands and agrees to all terms.
3. EVALUATION AND CONTRACT OVERVIEW
Understands and agrees to all terms.
4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
Understands and agrees to all terms.
5. PROPOSER'S RESPONSE: PROPOSED TEAM
Understands and agrees to all terms.
6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
Understands and agrees to all terms.

Name: Christopher Gomez Title: Chief Executive Officer

Signature:  Date: 03/22/2023

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Spirit Consulting whose business address is 1068 South Lewis Ave. Lombard, IL 60148 and (if applicable) Federal Employer Identification Number (FEIN) is 82-2553593 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Christopher Gomez and my relationship to the entity named above is Chief Executive Officer

1. The above-named entity is submitting a Proposal for the City of Fernandina Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity not its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Fernandina Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Fernandina Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Fernandina Beach.

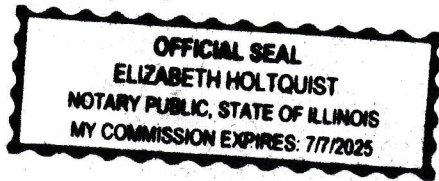
 3/22/23
Signature Date:

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF FLORIDA
COUNTY OF DuPage County, IL

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 22 day of March, 2023, and is personally known to me, or has provided an ID as identification.

Elizabeth Holtquist My Commission expires: 7/7/2025
Notary Signature



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for RFP 23-07.

This sworn statement is submitted by (entity) Spirit Consulting whose business address is 1068 South Lewis Ave. Lombard, IL 60148 and (if applicable) Federal Employer Identification Number (FEIN) is 82-2553593 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is Christopher Gomez and my relationship to the entity named above is Chief Executive Officer.

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Fernandina Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.



Signature

3/22/23

Date:

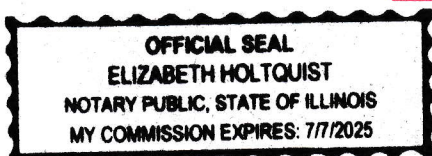
STATE OF FLORIDA
COUNTY OF DeFage County, IL

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 22 day of March, 2023 and is personally known to me, or has provided ID as identification.

Elizabeth Holtquist
Notary Signature

My Commission expires: 7/7/2025

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM**

EXHIBIT "H"

DISPUTES DISCLOSURE FORM

Answer the following questions by placing as "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES___ NO___✓___

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES___ NO___✓___

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES___ NO___✓___

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Fernandina Beach.

Spirit Consulting

03/22/2023

Firm

Date



Chief Executive Officer

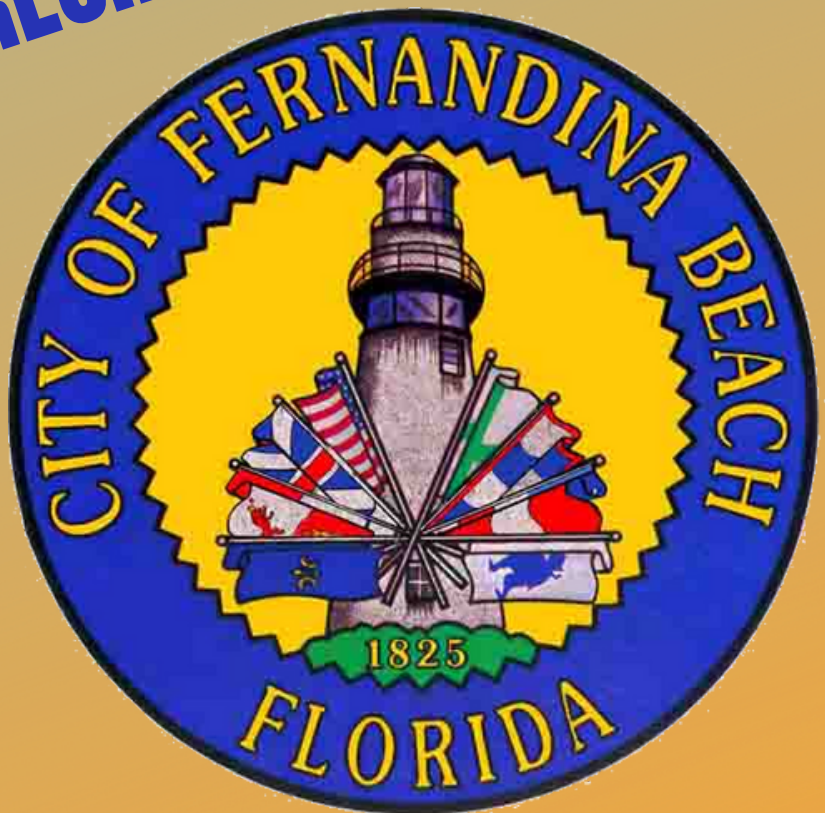
Authorized Signature

Printed or Typed Name and Title

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



CITY MANAGER RECRUITMENT PROPOSAL



PRESENTED BY:





404-535-0525
9848 Cameron Parc Ci.
Johns Creek, GA 30022



whutmacher@localgovexperts.com



www.sumterlocalgovconsulting.com

3/21/2023

City of Fernandina Beach
204 Ash Street
Fernandina Beach, FL 32034

Honorable Mayor and City Council,

Sumter Local Government Consulting (Sumter LGC) is pleased to provide a proposal to perform executive search services for the City of Fernandina Beach.

While Sumter LGC is a relatively new business, I am a local government industry veteran with over 25 years of experience as both a City Manager and a Consultant to local governments.

Search firms doing work in the public sector all propose a similar process. There is no secret special sauce. However, as you review our proposal, you will notice an articulable difference between Sumter LGC and more established search firms:

1. I focus considerable time understanding the culture of the city, talking with a wide range of stakeholders, and creating a customized candidate profile to differentiate talented candidates from the talented candidates who are a good fit for the City of South Fulton.
2. I advertise strategically with smart recruitment materials and most importantly work my nationwide network aggressively to find the candidates who are not in job search mode. Placing ads and sorting resumes into different piles is not a value add to your executive search.
3. I have experience working directly for elected officials and know how City Managers think. Acting as a conduit between candidates and the elected officials; I can speak both language and get results for clients. Importantly, I have been through this process as a consultant, a city manager and most importantly as a candidate.
4. My background check process is unique and comprehensive. It involves real legwork to avoid surprises and provide elected officials with meaningful data you can make sound business decisions from.
5. I am enthusiastic about public service and believe strongly that cities are most successful when they have strong partnerships between their elected officials and City Managers.

I would be thrilled to collaborate with you to find the right City Manager for the City of Fernandina Beach.

Sincerely,

Warren Hutmacher

Warren Hutmacher, President
Sumter Local Government Consulting

TABLE OF CONTENTS

1 CORPORATE PROFILE

2 CONSULTANT PROFILES

4 RECRUITMENT APPROACH

15 TIMELINE

16 SIMILAR PROJECTS AND EXHIBITS

Corporate Profile

CONTACT INFORMATION:

Primary Contact: Warren Hutmacher

Email: whutmacher@localgovexperts.com

Phone: 404.535.0525

Website: www.sumterlocalgovconsulting.com

HISTORY OF SUMTER LOCAL GOVERNMENT CONSULTING (Sumter LGC)

Sumter LGC was founded in 2021 by local government industry veteran Warren Hutmacher. Sumter LGC provides a wide array of customized management consulting services to local governments and organizations that operate within the local government sphere of influence.

PRIDE IN OUR EXPERTISE

Firm is dedicated to providing clients executive level assistance to solve complex problems and carefully handle important projects utilizing years of experience and accomplishments for the benefit of the client.

PRIDE IN THE PERSONAL ATTENTION WE PROVIDE TO CLIENTS

Sumter LGC is able to provide the personal attention to clients necessary to take on tough projects, meet deadlines and provide top-level expertise. Sumter LGC believes that local government consulting is a relationship business and that our reputation depends on how we treat our partners.

PRIDE IN PUBLIC SERVICE

Sumter LGC was founded by a career public servant who is the son of public-school teachers and has dedicated his career to working for the public good. Sumter LGC believes that our work for local government clients is an extension of their mission. We strive in everything we do to earn the trust of our clients and the communities we serve.

City Manager Recruitment Proposal



Warren Hutmacher



President, Sumter LGC



BA - Political Science (1995)



Masters Public Administration (1997)



INTERNATIONAL CITY/COUNTY
MANAGEMENT ASSOCIATION

Warren has over 25 years of leadership experience and is familiar with all aspects of municipal government. As former City Manager for the cities of Johns Creek, Dunwoody, Norcross, Avondale Estates and Hutto, Warren was involved in key community issues including traffic congestion, planning, neighborhood preservation, economic development, revenue expansion, and park development.

Serving various municipalities throughout his career, Warren has a great understanding of community issues and how to work with stakeholders to establish priorities that will provide the best and most meaningful results.

Warren works to solve complex problems and utilize his extensive skills for the benefit of his clients. He has worked on:

- Executive search
- Real estate development
- Redevelopment
- Enterprise Resource Planning
- Staff retreats and strategic planning
- Business process improvements
- Succession planning
- Interim services
- Personnel investigations
- Tourism

CITY OF FERNANDINA BEACH

www.sumterlocalgovconsulting.com

404.535.0525



Recruitment Approach

Sumter LGC will work collaboratively with the City of Fernandina Beach to recruit for a City Manager.

Sumter LGC will:

- Keep the city informed of key progress in the recruitment process
- Place the client's best interest above all others
- Provide candid and thoughtful assessments of the candidates
- Represent the client with integrity, professionalism and tact

PHASE 1 – RECRUITMENT PREPARATIONS

Kickoff meeting

- Set a schedule for the recruitment and establish dates for reaching each milestone.
- Identify administrative issues and settle role clarity between the consultant team and city staff
- Review the marketing plan and proposed advertising placement costs
- Identify administrative issues and role clarity between us and the city staff
- Communicate with the client how the Florida Open Records and Open Meetings Laws can impact the recruitment.

PHASE 1 – RECRUITMENT PREPARATIONS (Continued)

Developing the "Ideal Candidate Profile"

We believe that the most critical element in the recruitment process is creating a candidate profile for the city. This profile will be utilized to narrow the candidate pool and focus the search to look beyond the best qualified person and choose the best fit for the city.

This process includes challenging the client to think critically about what character traits, soft skills and leadership abilities candidates will need to have to be successful in Fernandina Beach. What is the current state of the culture of your organization? If it is a strong positive culture, will the candidates function within or possibly alter the culture of your organization?

How does their personality mesh with the rest of the team? Will they be able to challenge the team to improve?

Every recruitment is unique and for this recruitment bundle, we propose the following approach to the critical first steps in these recruitments:

Conduct interviews with the Mayor, City Council and key staff to:

- Define the current state of the city and the culture of the organization
- Articulate the expectations for success for the roles recruited for
- Create a profile for what type of leaders are needed, what type of personalities will be most successful in Fernandina Beach and what type of personalities are to be avoided in narrowing the candidate pool

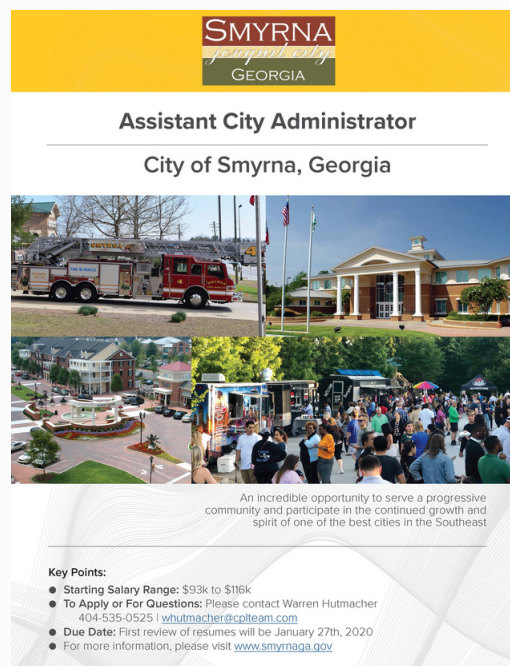
Please see Exhibit "A" for an example of a candidate profile we have used in a previous recruitment.

PHASE 1 – RECRUITMENT PREPARATIONS (Continued)

Design of Recruitment Materials

Sumter LGC creates a unique and informative digital candidate brochure to use in our marketing materials to catch the attention of the top talent. The brochure is a staple in recruitments, however, they have become stale. We see them as a story-telling opportunity to capture the essence of a community and articulate the value proposition for the position we are recruiting for. Candidates can easily move through the brochure to find pertinent information and get a gut feeling for the community and the job. We have also included video in a previous brochure to stay on the cutting edge.

See Exhibit "B" for examples of brochures we have used in previous recruitments.



PHASE 2 – ADVERTISING & NETWORKING

Advertising

One of the most important elements of an effective recruitment is to build a large and diverse pool of qualified candidates. Simply put, the larger the qualified pool the better chance you have to find the right candidate for Fernandina Beach. To attract a large and qualified pool through advertising, effort has to be taken to choose carefully where to post the jobs and how to post them.

We work diligently to craft job advertisements and brochures to attract a wide range of candidates and we limit the placements to places where the best qualified candidates will look when they search for a job. Adding to the pool by recruiting candidates that aren't actively looking for work is very important and often times is the strategy that delivers the best candidates.

Sumter LGC believes the best way to achieve equity and diversity in the municipal workforce is to attract a diverse candidate pool. We recommend that clients select the best qualified candidate who is the right fit for the job, however a larger and more diverse pool offers the best chance for an equitable hiring process. We utilize a wide range of advertising sources to enlarge and diversify our applicant pool. We dig a little deeper than traditional sources to find places to both advertise and recruit where diverse candidates are already looking for jobs.

We believe that this is not only the right thing to do but that it is reflective of good business practices.

PHASE 2 – ADVERTISING & NETWORKING (Continued)

Recruiting

Most executive search firms develop a system of posting advertisements and depend on that approach along with email blasting a list of open jobs they are recruiting for to past candidates and any anyone who signs up for their publications. It isn't a targeted approach that is most effective in these types of recruitments.

For Fernandina Beach, while we recommend strongly that you advertise nationally, however the most likely scenario is that your most interested candidates are already working in the State of Florida.

Sumter LGC also has an extensive local network to put to use for the benefit of Fernandina Beach. Warren is a member of the Florida City County Managers Association and attends local networking events and conferences. Warren also makes phone calls to his network to find and recruit candidates that meet your candidate profile. It takes time, effort and persistence to recruit candidates instead of being reactive relying on advertisements and email blasts.

PHASE 3 – CANDIDATE EVALUATION

Resume Review

Resumes will be collected directly by Sumter LGC. They are reviewed against the candidate profile to narrow the pool to a semi-final group considered to be genuine hiring possibilities.

An advantage to hiring Sumter LGC for your recruitments is that your executive recruiter will be solely responsible for the task of reviewing applicants. For this assignment, Warren Hutmacher will be handling the initial review of resumes. Larger firms sometime use lower hourly rate assistants to sort through resumes. This can lead to good candidates who meet the most important qualifications but not all of the profile to be discarded. This task requires an experienced professional with good judgment.

Some clients prefer to review and approve the semi-finalist list prior to our conducting of initial interviews. We will honor the client's preference.

Initial Interviews

When practical at this phase, Sumter LGC prefers to meet with candidates face to face instead of on a phone call or a recorded interview. We record all the interviews whether in person or virtual so the client can see what we see. We learn a great deal from body language, facial expressions, enthusiasm and tone of voice. We send these recordings to the elected officials for their review.

After initial interviews, we will recommend to the city a manageable finalist group for a more formal in person interview process. Sumter LGC will provide a written report summarizing each recommended finalist candidate (up to 10). Typically, the elected officials will choose 3-5 finalists to interview in your community.

PHASE 3 – CANDIDATE EVALUATION (Continued)

Finalist Interviews

The interview process can be handled in a variety of ways. We formulate an interview process based on the position we are recruiting for as well as the desires of the elected officials. We fully prepare the City Council with best practices for interviewing candidates and when requested we provide suggested interview questions to the elected officials.

For this City Manager recruitment, Sumter LGC recommends a full day interview approach. The day could be comprised of a tour of South Fulton, meetings with staff leadership team, and a diverse panel type interview comprised of citizen, business owner and community stakeholders. We have found that having the candidates interact with a wide assortment of people provides different perspectives on the candidate's strengths and weaknesses. In addition to the more formal activities, we will have the candidates go to lunch or for coffee with city staff or community members to interact in a more casual setting.

Our initial thought is to employ a five-step approach to the interview day:

Step 1: Candidates will interview with a community panel. This will allow for feedback from a diverse group of community stakeholders who will ultimately work with the new City Manager on a variety of issues.

Step 2: Candidates will interview with the staff leadership team. This will allow candidates to get a feel for the personalities of their direct reports and for the staff to be able to advise the elected officials as to which candidates they believe would most effectively work with the leadership team on a staff level.

Step 3: Candidates meet with city staff/community panel members individually over lunch and for coffee to create a casual atmosphere to get to know the candidate's personality and character.

Step 4: Tour of South Fulton by city staff to help the candidate learn more about South Fulton and get another casual opportunity to get to know the candidate's personality and character.

Step 5: Elected officials spend 75 to 90 minutes to interview each candidate.

At the end of the day, we recommend a feedback loop between the elected officials and as many of the staff and community participants from the interview day.

PHASE 3 – CANDIDATE EVALUATION (Continued)

Candidate Selection - Alternatives to consider

Some elected officials prefer a more private process and others prefer a public facing process. The following is a list of techniques we have assembled for you to consider in constructing a unique and personal approach that works for the City of Fernandina Beach community.

- Public forum involving each candidate to allow the candidates to speak directly with the public and take questions and answers from the public in a live setting that is also streamed online.
- A speed dating type of approach where each candidate is provided a table to sit at and the individual community members from the general public can sit with candidates for a five-minute one-on-one type "speed dating" conversation to ask questions and get to know the candidates. Every five minutes, the bell is rung, and the public rotates to meet the next candidates. At the end, the public is asked to provide their written feedback for the elected officials to consider.
- An interactive activity that the candidates participate in to allow the elected officials to see them in action in a stressful or creative exercise. An example I have used previously is posted as Exhibit "C".
- Asking the candidates to prepare ahead of time material to present to the City Council to gauge the candidate's presentation skills, preparation ability, critical thinking and research techniques and their attention to detail.

PHASE 3 – CANDIDATE EVALUATION (Continued)

Candidate Selection

After the interviews and activities are completed, Sumter LGC will gather the elected officials with all of staff and community participants who interacted with the candidates. Everyone is invited to provide feedback on both substantive information and little things they believe would help to define the candidate's personality, character, style and suitability for the job. This feedback loop will help add to the data the elected officials need to sift through to make the final selection of their new City Manager.

The recruiter will sit with the elected officials in an executive session after all the feedback is received. This discussion typically results in a consensus decision for the Council as to who they wish to offer the position to.

The recruiter is not the decision maker and is present to facilitate conversations, answer questions and offer opinions only when asked.

PHASE 4– NEGOTIATION & BACKGROUND CHECKS

Negotiations

When the elected officials come to a decision on their top candidate, Sumter LGC will work with you to formulate a term sheet with the key business terms to begin the negotiation process.

Sumter LGC is intimately familiar with this process as both a consultant and a candidate. We are on top of industry trends and methods of finding compromises each party can agree to.

To help the process along, Sumter LGC will provide the City Manager with salary and benefit data relevant to the size of Fernandina Beach and the marketplace in your competitive area.

Once the offer sheet is agreed to, Sumter LGC will work with the candidate and your City Attorney to come to terms on a formal contract.

PHASE 4– NEGOTIATION & BACKGROUND CHECKS (Continued)

Background Checks

Sumter LGC recommends holding off on background checks until both the parties have established mutual interest, and agreed to terms (subject to a background check).

Sumter LGC will perform the requisite criminal checks (with the aid of the Fernandina Beach PD), education and employment verifications. Sumter LGC believes that a lot of cities and executive search firms fall prey to process fatigue during the background investigation phase.

Sumter LGC doesn't ask candidates for references, but we do fully investigate a candidate's background. Once the parties have agreed to terms and the candidate agrees to a background check, we choose who we want to talk with from their professional background. Having candidates submit their list of chosen references is a hollow effort. Candidates share only references who look upon them favorably. This limits the usefulness of the background check process.

Sumter LGC digs into a candidate's professional background to eliminate surprises and to get a full view of the candidate's veracity and character. We believe that clients should know everything we can about candidate's backgrounds before taking a final vote on a contract. We have the experience and aptitude to delve into deep internet searches, social media posts, blogs and other sources.

At the discretion of the client and only at the direct costs of travel Sumter LGC will travel to the city or cities the final candidate has managed to fact check their resume, get firsthand information on projects they worked on and to meet the people they worked with. We don't believe that any other executive search firm offers this level of service. Neither the client nor search firms wants to repeat a search process because we either missed something or didn't dig deep enough during the background check process.

Working toward this level of scrutiny gives clients the best chance at knowing all they can to make a sound decision in selecting a City Manager.

PHASE 5 - CANDIDATE ANNOUNCEMENT

Announcement

Sumter LGC will write or assist the City to compose a press release or other media relations efforts as a part of our flat fee. The initial press release and responses to media coverage can get the candidate and the city off on the right start in telling the story of how the candidate will benefit the City of South Fulton as well as explain the process that brought the candidate to the city.

Sumter LGC will also handle notifying candidates that were not selected. We are sensitive to the compassion required to handle this duty and are skilled at delivering difficult news in a constructive manner to candidates. We respect that the reputation of the city is at stake, and we take every step to preserve the good name of the city during this process.

FINAL THOUGHTS

Sumter LGC is confident in our process and if the city decides to start over with the recruitment due to unsatisfactory candidates, or the chosen candidate doesn't last a year in the position for any reason, we offer a one-year guarantee. We will complete another search for the City at no charge (except reimbursable expenses).

Sumter LGC offers a follow up service to work with the new City Manager for the first year of employment as a mentor and resource. A fee for this service can be negotiated at a later date.

Sumter LGC will coordinate the travel arrangements with candidates.

Sumter LGC will disclose any relationships we may have with any candidates, current, or former Fernandina Beach staff. At this time, we know of no relationships Sumter LGC has with current or former Fernandina Beach staff that would prevent us from handling this recruitment.

PROPOSED SEARCH TIMELINE

We expect to move quickly once awarded this assignment. Here is a preliminary timeframe and list of meetings based on our experience with other clients. Our goal is for a 70-day process to propose finalist candidates to the client.

Initial Kick-off meeting:

On site visit in Fernandina Beach:

- Meeting with the elected officials and any staff they recommend talking with to gain clarity and consensus on the roles and responsibilities expected of the City Manager
- Interviewing the elected officials and key staff and community members to develop a candidate profile
- Agreeing to a recruitment schedule and handling administrative issues
- Gaining familiarity with the city and reviewing expected challenges for the new City Manager

Complete candidate profile, recruitment brochure and advertising plan

2-week milestone:

- Advertise position widely with a completed recruitment brochure

6-week milestone:

- Initial review of resumes and scoring of proposed semi-finalist candidates

7-week milestone:

- Selection of semi-finalist candidates (on site in Fernandina Beach)

8-week milestone:

- Interviews of semi-finalist candidates by Sumter LGC

10-week milestone:

- Present finalist candidate recommendations (on site in Fernandina Beach)

Finalist interviews, background checks, offer and contract negotiations and press release announcement will be the final steps in the process.

SIMILAR PROJECTS

In addition to City Manager recruitments, Sumter LGC has extensive experience in public sector executive search.

2023

City of South Fulton, GA

- Assistant City Manager (suspended)
- Internal Auditor (in progress)

2022

City of Winder, GA

- Human Resources Director
- Planning Director

City of College Park, GA

- City Manager
- Public Works Director
- City Engineer
- Chief Building Official
- Airport Affairs Director

2020

City of Winder, GA

- City Engineer

City of Doraville, GA

- City Clerk

City of Smyrna, GA

- Assistant City Administrator

City Manager Recruitment

City of College Park, GA (2022/2023)

The City has hired Stanley Hawthorne as the new City Manager. His start date is April 3rd, 2023.

College Park, GA (Population 13,990) is located in Fulton County, GA on the southern border of the City of Atlanta. Founded in 1890, the City of College Park is a diverse urban community led by a Mayor and City Council and it operates utilizing a Council-Manager form of government.



SIMILAR PROJECTS

Executive Search City of College Park

Recruitment for City Manager

Location: College Park

Client: City of College Park

Completion Date: 2023

Reference: Bianca Motley-Broom, Mayor

Tel: 404.669.3755 | bmotleyvbroom@collegenparkga.com

College Park, GA is located outside of Atlanta, GA and has a population of 14,000. The community operates with a council-manager form of government, with the city Manager in full control of hiring/firing decisions. The City's all funds budget is \$131,000,000 and has four hundred employees.

The City Manager supervises 16 operating departments. In addition to managing day to day operations, the City Manager works directly with the elected officials and represents the city's interests regionally.

The City of College Park was seeking stability in leadership, with the last City Manager lasting just four months in office. The City of College Park is a highly complex operation for its size, operating full-service utilities, a golf course, a convention center and an arena. The City was seeking a candidate who could handle the volume of work, relate to the community and thrive in a very difficult political environment.

Hutmacher worked on a candidate profile and brochure to fully define the City's expectations and to attract the right caliber of candidates from the marketplace. Hutmacher leveraged his extensive industry network to identify candidates who could succeed in College Park.

Hutmacher reviewed resumes, participated in initial interviews, and proposed a final list of candidates for the city to interview.

The interview process was multi-pronged with the city staff and elected officials involved in the interview. The city selected a candidate with a 25-year career in city government, having worked as both an Assistant City Manager for a large complex city in Ft. Lauderdale, FL. He also had experience managing medium sized communities in both Florida and Connecticut. Stanley Hawthorne was chosen for the position. Stanley's background included work in utilities, community building, redevelopment and operations.

Stanley Hawthorne fit the ideal candidate profile, mixing his skill and passion for customer service with his executive skills in managing large and complex operations.

Hutmacher completed the recruitment in 4 months from kickoff to the announcement of the hire.



SIMILAR PROJECTS

Executive Search City of Smyrna

Recruitment for Assistant City Administrator

Location: Smyrna, GA
Client: City of Smyrna
Completion Date: March 2020
Reference: Tammi Saddler Jones, City Administrator
Tel: 678.631.5407 | tsjones@smyrnaga.gov

Warren Hutmacher was engaged to recruit an Assistant City Administrator for the City of Smyrna, GA.

Smyrna, GA is located outside of Atlanta, GA and has a population of 51,000. The community operates with a modified council-manager form of government, with the City Administrator required to have Council consent for certain executive hiring decisions. The City's budget is \$92,000,000 and has 470 employees.

The Assistant City Administrator works for the City Administrator and has responsibility for a portfolio of operating Departments and works on high profile projects. This position has direct contact with elected officials, all levels of city staff and the public. This position also maintains relationships with neighboring jurisdictions, state and federal officials.

Hutmacher was engaged for this Executive search due to the experience in local government and his good reputation with the leaders in Smyrna. His knowledge from his 16 years as a City Manager and his keen eye for assessing candidates' soft skills were the main factors in hiring Hutmacher for this recruitment.

Hutmacher created an ideal candidate profile and brochure after an extensive effort to fully understand the needs of the client. Hutmacher executed the advertising strategy and leveraged his extensive industry network to identify candidates and recruit them to apply for this position. Hutmacher managed the resume review, conducted initial interviews, and recommended candidates for the city to interview.

In this case, Hutmacher set up a panel of neighboring City Managers to assist with the finalist interviews. City staff provided tours of the city and hosted candidates for lunch to make sure the candidates understand fully what Smyrna had to offer in a casual environment for the staff to get to know the candidates. At the conclusion of the day, the staff and the panel gather with Hutmacher and the City Administrator to exchange impressions of the candidates.

In addition to the panel interview and the tours and lunches, we set up an activity for each candidate to assess their crisis management skills. At the end of the panel interviews we took the candidates to a conference room with the Public Works Director. The Director acted out a scenario in which he briefed the candidates about a bridge collapse that has taken out the city's main artery causing injuries and property damage. The candidates created an immediate and long-range action plan on how the city should respond and then deliver that action plan to the panel for questions and answers.

In this job, thinking quickly, acting boldly and being able to explain your rationale is important. This type of assessment puts those skills to the test.

Hutmacher completed the recruitment in less than 75 days from kickoff of the recruitment.

SIMILAR PROJECTS

Executive Search City of Hutto

Recruitment for Economic Development
Director

Location: Hutto, TX

Client: City of Hutto

Completion Date: 2021

Reference: Matt Wojnowski, ACM

Tel: 512.230.8489 | matt.wojnowski@huttotx.gov

Hutto, TX is located outside of Austin, TX and has a population of 35,000. The community operates with a council-manager form of government, with the city Manager in full control of hiring/firing decisions. The City's budget is \$45,000,000 and has one hundred and fifty employees.

The Economic Development Director works for the City Manager and manages both city economic development efforts and serves as the director of the Hutto Economic Development Corporation. The Department has just two employees and a budget of \$300,000. This position also maintains relationships with the Austin and Hutto Chambers of Commerce, the K-12 and technical schools, as well as the development and brokerage community.

Hutto was seeking an Economic Development Director with deep connections and networks in Texas, experience working large scale economic development projects, great communication skills and an aggressive attitude. The new Economic Development Director had to repair the City's relationships with outside entities and build a strategy for long term success. Hutto wanted an Economic Development Director that would fit in with the culture of the organization and work effectively with the Leadership Team.

Hutmacher worked on a candidate profile and brochure to fully define his expectations and to attract the right caliber of candidates from the marketplace. Hutmacher leveraged his extensive industry network to identify candidates who could succeed in Hutto.

Hutmacher reviewed resumes, participated in initial interviews, and selected a final list of candidates for the city to interview.

The interview process was multi-pronged with the Economic Development Corporation board members, city staff and community members involved in the interview. The city selected the candidate with a 30 year career in economic development for both the public and private sector. Bob Farley was chosen for the position. Bob's background included work as both a city economic developer and a consulting background as a site selector. Bob was a go-getter with a broad network and the know how to pull together large deals and to work with the Austin Chamber of Commerce to collaborate on the largest and most complex deals.

Bob created a first class economic development department, made friends everywhere he goes and pulled together over 2,000 acres of development in his first year with deal values well over \$500 million dollars.

Hutmacher completed the recruitment in 71 days from kickoff to the announcement of the hire.



SIMILAR PROJECTS

Executive Search City of Dunwoody

Recruitment for Police Chief

Location: Dunwoody, GA
Client: City of Dunwoody
Completion Date: 2009

Reference: Sharon Lowery, City Clerk

Tel: 678.382.6700 | Sharon.lowery@dunwoodyga.gov

Dunwoody, GA is located outside of Atlanta, GA and has a population of 46,000. The community operates with a council-manager form of government, with the City Manager in full control of hiring/firing decisions. The City's budget is \$25,000,000 and has three hundred employees included embedded contractors. The Police Chief works for the City Manager and has responsibility for a full-service Police Department totaling sixty-five employees and a budget of \$9,300,000. This position also maintains relationships with the elected officials, the citizens of Dunwoody, neighboring jurisdictions, state and federal officials.

The Police Chief was the first major hire for the newly incorporated City of Dunwoody. The city was seeking a strong leader for the Police Department who had the administrative skills and vision to build the police department from scratch in just 90 days. The city also wanted a Police Chief that could embrace the Dunwoody community and lead a department that would engender the admiration and respect of its citizens.

Hutmacher created a candidate profile and brochure after fully defining his expectations to attract the right caliber of candidates from the marketplace.

Hutmacher executed the advertising strategy for the position, while leveraging his extensive industry network to identify candidates who could succeed in Dunwoody.

Hutmacher reviewed resumes, conducted initial interviews, and chose a final list of candidates for the city to interview.

In this case, Hutmacher utilized a panel to interview candidates consisting of the County Sheriff, sitting Police Chiefs and a neighboring City Manager to conduct the finalist interviews.

Chief Grogan has been with the city from 2009 to the present and served as the President of the Georgia Chiefs of Police. He is beloved in Dunwoody and was responsible for the fastest startup of a municipal police department. The City of Dunwoody found the right person for the job!

Hutmacher completed the recruitment in 60 days from kickoff to the announcement of the hire.



City of
Dunwoody
Georgia

SIMILAR PROJECTS

Executive Search City of Johns Creek

Recruitment for Public Works Director

Location: Johns Creek, GA
Client: City of Johns Creek
Completion Date: 2017

Reference: Kimberly Greer, Assistant City Manager
Tel: 678.512.3200 | Kimberly.greer@johnscreekga.gov

Johns Creek, GA is located outside of Atlanta, GA and has a population of 84,000. The community operates with a council-manager form of government, with the city Manager in full control of hiring/firing decisions. The City's budget is \$60,000,000 and has four hundred employees including embedded contractors.

The Public Works Director works for the City Manager through an embedded services contract and has responsibility for a full-service Public Works Department including Parks and Recreation. The Department has seventy-five employees (including contract employees) and a budget of \$6,300,000. This position also maintains relationships with the elected officials, citizens of Johns Creek, neighboring jurisdictions, state and federal officials.

Hutmacher was seeking a Public Works Director with strong administrative skills and exceptional communication skills who could rebuild trust with the elected officials. The new Public Works Director also needed to work in an unprecedented fashion with the public to gain community consensus for controversial road projects. Hutmacher wanted a Public Works Director that would fit in with the culture of the organization and work effectively with the Leadership Team.

Hutmacher created a candidate profile and brochure to fully define his expectations and to attract the right caliber of candidates from the marketplace. Hutmacher executed the advertising strategy for the position and leveraged his extensive industry network to identify candidates who could succeed in Johns Creek.

Hutmacher reviewed resumes, conducted initial interviews, and chose a final list of candidates for the city to interview.

The interview process was traditional with a small panel interview of city leaders. The city selected the candidate with the highest degree of risk. Lynette Baker was chosen for the position. With a background as a fisheries scientist (working on an Alaskan fishing boat) and as a Transportation Group Leader for Jacobs Engineering, she did not possess the Professional Engineer (PE) license expected of a Public Works Director in a large complex city. She had never worked in city government. Baker however was a skilled communicator, leader, and administrator. She was engaging and easily established rapport during the interview process.

She reestablished the credibility of the Department and was a key member of the Leadership Team. Her employees loved her, and she has a knack for working with the public through complex and emotional projects. Lynette Baker was the right fit for the job!

Hutmacher completed the recruitment in 65 days from kickoff to the announcement of the hire.



SIMILAR PROJECTS

Executive Search City of Doraville

Recruitment for a City Clerk

Doraville, GA is a first ring exurb of Atlanta, GA and has a population of 15,000. The community is managed with under a council-manager form of government, with the City Manager having supervisory authority over the City Clerk. The City's budget is \$13,900,000 and has 175 employees.

The City Clerk works for the City Manager and has full responsibility for managing the agenda process, compiling minutes, and managing the records functions of the city. The City Clerk is a member of the leadership team.

Warren Hutmacher was engaged for this Executive search. His knowledge from his 20 years as a City Manager and his keen eye for assessing candidates' soft skills were the main factors in Hutmacher being chosen for this recruitment.

Hutmacher created a candidate profile and brochure after an extensive effort to fully understand the needs of the client. Hutmacher executed the advertising strategy for the position and leveraged extensive industry network to identify candidates. Hutmacher sorted through the resumes, conducted initial interviews, and recommended candidates for the city to interview. For Doraville, Hutmacher recruited two of the four finalists for the position who were not in the market for a new job.

Allison Tarpley was selected for this position. Allison was a certified municipal clerk and had extensive experience in the position from her work with the City of Johns Creek. She perfectly fit the candidate profile the city had for the position and has been instrumental in bringing the city into compliance with Georgia law as well as bringing a positive attitude to the position which has enriched the City's culture.

Location: Doraville, GA

Client: City of Doraville

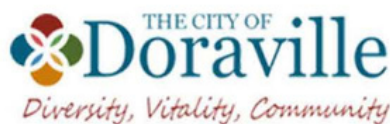
Completion Date: 2020

Reference: Chuck Atkinson, Chief of Police
(formerly Interim City Manager)

Tel: 770.455.1716 | Chuck.Atkinson@Doravillega.us

Unique to this recruitment was a request from the City of Doraville to provide the city with an Interim City Clerk during the recruitment process. Hutmacher found an outstanding candidate in a matter of days, and they began their interim services within a week after approval from the City. The interim Clerk bridged the gap for the City between City Clerks while the city looked to hire a new City Clerk

Hutmacher set up final interviews in a COVID Compliant manner and helped advise the city in the selection process. CPL completed this recruitment in 72 days from kickoff to the announcement of the hire.



FEE PROPOSAL

Sumter LGC is proposing a flat fee for this executive search assignment excluding expenses.

Fee proposal for professional services: \$21,250

Expenses to be reimbursed by City based on actual documented expenses:

- Consultant Travel:
- Advertisements:
- Background checks:

City should expect to pay certain direct expenses from this recruitment to include:

- Candidate travel
- Meals and other hosting expense related to public events
- Candidate hospitality

EXHIBIT A - EXAMPLE - CANDIDATE PROFILE

CITY OF COLLEGE PARK, GEORGIA



The Ideal Candidate

- Integrity and the courage to effectively manage in a council-manager form of government
- College Park is an advanced class in city management with complex service delivery and financial models
- Adept at determining and ordering priorities; managing delegation of responsibilities to key staff
- Positive attitude and ability to interact with citizens, elected officials, staff, and consultants
- Expertise in advising City Council on complex and/or controversial issues
- Communication skills to be effective with a full range of internal and external constituencies
- Customer Service mentality for "getting to yes" while adhering to all laws and regulations
- Humble and naturally helpful person
- Ability to read people, quickly decipher challenges and use good judgment in making difficult decisions
- Keen eye for talent
- Resourceful problem solver willing to provide others credit
- Contributes to the profession and actively engages in professional development
- Always embodies integrity and is focused on the City's best interests

EXHIBIT B - EXAMPLE - RECRUITMENT BROCHURES



CITY OF COLLEGE PARK, GEORGIA

CITY MANAGER

RECRUITMENT



Searching for the right City Manager candidate to take College Park to new heights

First Review of Resumes - October 26, 2022

[Click here for the College Park, GA City Manager Recruitment page](#)

Executive Search provided by:





CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

College Park Value Proposition



College Park Mayor and Council



Downtown Mural



Six West Master Plan

College Park, Georgia is an established community with a variety of housing types, and a genuine and charming downtown. As a result, it is uniquely positioned for rapid economic growth as both a hub for travel and tourism and the regional aerotropolis of the Southeast.

College Park is an attractive location for raising a family with all the amenities of Atlanta at your doorstep. The City is home to the headquarters for companies such as Chick Fil A, and home to Woodward Academy, the largest private school in the country. College Park is a vibrant community known for its history, sense of community, and quality of life.

Living in the City affords you walkable access to restaurants and shopping downtown. In addition, the City has an abundance of parks and police and fire services that provide a safe environment.

Most of all, the City is a collection of neighborhoods with a fierce sense of pride and a bountiful optimism for a bright future. The next city manager will have the opportunity to leverage the existing strengths of College Park and forge a path forward to unlocking its great potential.

Executive Search provided by:



WARREN HUTMACHER, EXECUTIVE RECRUITER

404.535.0525

whutmacher@localgovexperts.com

www.sumterlocalgovconsulting.com



CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

The Community

College Park embraces its rich history and culture. Originating from a land grant awarded in 1846, and chartered in 1895, the City has the fourth largest urban historic district in Georgia, with 867 structures on the National Register of Historic Places. The College Park Women's Club is one of the oldest in Georgia. The East-West streets (avenues) are named for Ivy League institutions, and the north-south streets are named for influential College Park residents.

Named one of Atlanta Magazine's "Best Places To Call Home," the City of College Park has become one of the most exciting communities in the greater metropolitan Atlanta area in which to live.

A well-established community with an individuality all its own, College Park is located near the Hartsfield-Jackson Atlanta International Airport, on Interstates I-85 and I-285. Residents and visitors alike will find that this revitalized City offers the best Southern hospitality in its city services, local restaurants, lodging accommodations, parks and recreation, and community events.



Harry the Hawk with students



Historic home



Hartsfield Jackson Airport

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404.535.0525

whutmacher@localgovexperts.com

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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

The Community (Continued)



Gateway Arena @ College Park

The Gateway Center Arena @ College Park is the new arena in College Park, and home to the WNBA's Atlanta Dream and the NBA's Atlanta Hawks' new G-League development team, the College Park Skyhawks. The facility, opened in November 2019, and brings a new tone to the City. This 98,000-square-foot sports arena is the first of its kind south of I-20 in terms of access and capacity. It hosts graduations, concerts, and high school and college tournaments.



Downtown Atlanta

The City's permanent population numbers about 15,000. Employers, however, may take advantage of a metropolitan labor force of more than 3,000,000. In addition, a well-maintained and convenient highway system, along with extensive rapid rail and bus routes, enables workers to access a wide range of employment options.



Woodward Academy

In addition, as the home to 8,000 hotel rooms, the second-largest convention center in Georgia, the largest private school in the continental United States (Woodward Academy), a thriving Main Street corridor, and a large portion of Hartsfield-Jackson Atlanta International Airport within its borders, College Park is a small town with the budget, amenities, and complexities of a much larger city.

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whutmacher@localgovexperts.com

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CITY OF COLLEGE PARK, GEORGIA

The Community (Continued)

The City of College Park sits in an enviable spot in the landscape of metro Atlanta with convenient proximity to the airport, downtown, world-class sporting events, and restaurants.

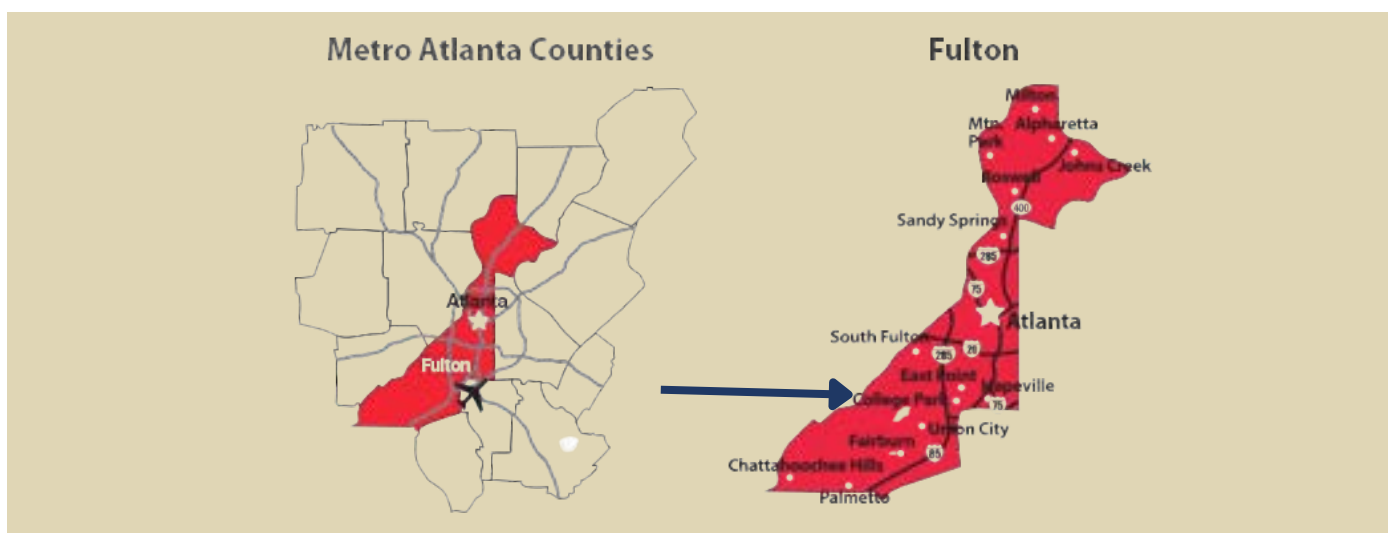
College Park is home to and close to a vibrant cultural scene and all of the world's best retailers. The City is close to Centennial Olympic Park, the Coca-Cola Museum, the College Football Hall of Fame, the Carter Center, CNN Center and the Atlanta Beltline.



Atlanta Beltline Multi-Use Trail



Centennial Olympic Park and Atlanta Skyline



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whutmacher@localgovexperts.com

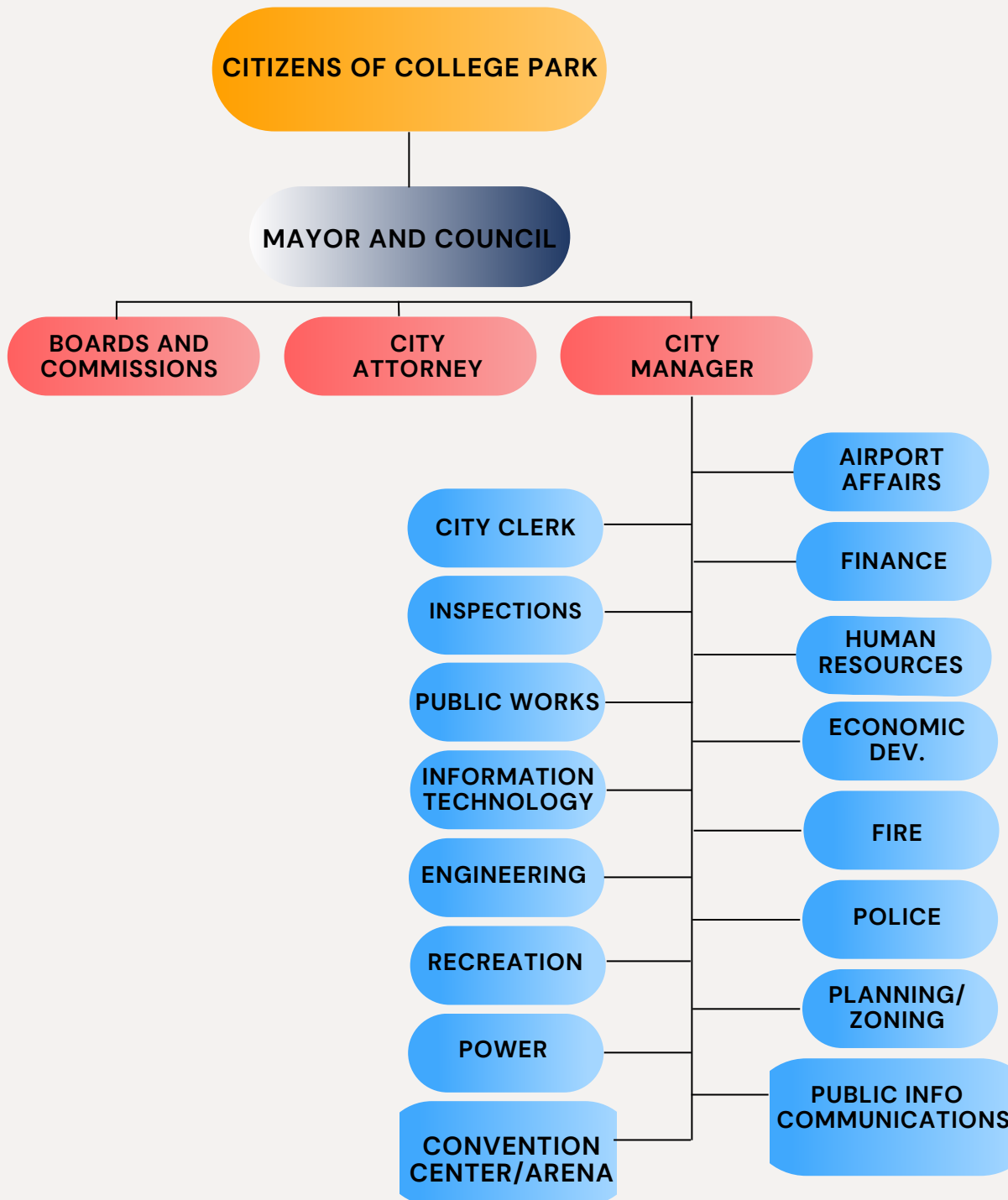
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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

The Organization- Current Organizational Chart



Executive Search provided by:



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404.535.0525

whutmacher@localgovexperts.com

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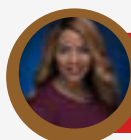
CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Department Heads (Reporting to the City Manager)



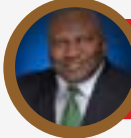
JACKSON MYERS
Infrastructure and
Development Director



ALTHEA PHILOORD BRADLEY
Finance Director



HUGH RICHARDSON
CP Power Director



MICHAEL HICKS
Chief Information Officer



JAMESIA HARRISON
Communications Director



MICHELLE JOHNSON
Recreation & Cultural
Affairs Director



MICHELLE ALEXANDER
Economic Development
Director



MERCEDES MILLER
GICC & Gateway Arena
Executive Director



SHAVALA AMES
City Clerk



VACANT
Public Works Director



DR. DWIGHT BAKER
HR & Risk Management
Director



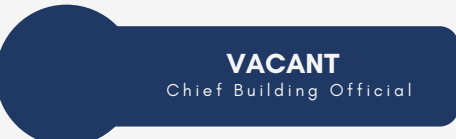
VACANT
City Engineer



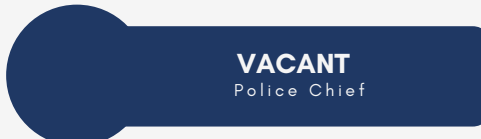
WADE ELMORE
Fire Chief



VACANT
Airport Affairs Director



VACANT
Chief Building Official



VACANT
Police Chief

Executive Search provided by:



WARREN HUTMACHER, EXECUTIVE RECRUITER

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whutmacher@localgovexperts.com

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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

The Position

The City of College Park, GA is over 11 square miles with a population of 14,000 as of the 2020 census.

The City's general fund budget in 2022 is \$30M and all funds top out at over \$131M. College Park is a complex organization with diversified revenue sources, including a city-owned electrical utility, Arena, Convention center, golf course, hotel/motel fund and the more traditional property and sales tax revenue. The City has a \$15M unreserved fund balance, nearly \$6M more than is required under the City's financial policies.

The City employs over 400 people directly and serves over 8,000 power customers and over 2,800 water and sewer accounts.

The City is chartered under the Council-Manager form of government, represented by 4 Councilpersons elected by district and a Mayor elected City-wide. The City Council meets twice a month and has several members with long standing tenure and experience.

The City of College Park, GA is an advanced class in city management. The position is challenging and demanding but also rewarding.



College Park PD at Christmas Parade



Main Street Academy Government Day



Executive Search provided by:



WARREN HUTMACHER, EXECUTIVE RECRUITER

404.535.0525

whutmacher@localgovexperts.com

www.sumterlocalgovconsulting.com

CITY OF COLLEGE PARK, GEORGIA



The Ideal Candidate



- Integrity and the courage to effectively manage in a council-manager form of government
- College Park is an advanced class in city management with complex service delivery and financial models
- Adept at determining and ordering priorities; managing delegation of responsibilities to key staff
- Positive attitude and ability to interact with citizens, elected officials, staff, and consultants
- Expertise in advising City Council on complex and/or controversial issues
- Communication skills to be effective with a full range of internal and external constituencies
- Customer Service mentality for “getting to yes” while adhering to all laws and regulations
- Humble and naturally helpful person
- Ability to read people, quickly decipher challenges and use good judgment in making difficult decisions
- Keen eye for talent
- Resourceful problem solver willing to provide others credit
- Contributes to the profession and actively engages in professional development
- Always embodies integrity and is focused on the City’s best interests

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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Qualifications, Education and Experience

The City Manager for the City of College Park will be responsible for running the day-to-day operations of a very complex organization. Therefore, the City Manager must have the skills, experience, education, and demonstrated judgment to handle various expectations.

The successful candidate will need to have a bachelor's degree. In addition, an advanced degree such as a master's degree in public administration is desirable.

The successful candidate will have diverse professional experiences to help prepare him/her for this challenge. The ideal background will be a candidate with prior City Manager experience in a Council-Manager form of government of similar complexity to College Park. In addition, the successful candidate will have experience managing a wide range of services in a major metropolitan area.

This job will require a candidate who knows how to lead and manage simultaneously and has proven experience in prioritizing and delegating responsibilities.

Ultimately, the City is looking for a candidate who is the "right fit" for College Park.

The recruitment is national in scope, and the city encourages both in-state and out-of-state candidates.



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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Current Challenges and Opportunities



Six West Development



Municipal Infrastructure

The new City Manager will be in place by January, 2023. The following challenges and opportunities are highlighted below.

- Executing capital planning to keep the City invested in municipal infrastructure improvements.
- Promoting Economic Development to further the goals of the City.
- The next City Manager will need to work with the staff to identify opportunities to keep the budget stable and grow commercial tax opportunities through downtown development.
- Providing leadership and stewardship to move the Six West Development forward. The Six West development involves over 311 acres of City-owned property just west of the historic downtown district and the College Park MARTA station. Named to capture the legacy of former neighborhoods anchored by six college-named streets, the public-private venture will expand the College Park community experience with a vibrant, mixed-use regional center with unique recreation and entertainment venues.

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CITY OF COLLEGE PARK, GEORGIA

Current Challenges and Opportunities (Continued)



Filling Key Vacancies

- Hiring for key personnel – 4 Department Heads and 1 Assistant City Manager. The City has a very talented, dedicated, and experienced staff that has thoughtfully worked with the elected officials and the community on the planning and implementation of the plans that have made College Park such a desirable community in which to live, work, play and stay.
- It will be important to maintain stability and the high morale of residents, businesses, and community partners during the transition to a new City Manager. Therefore, the next City Manager should take all opportunities to be highly visible and accessible to the community and use the first year to get to know College Park, build trust with key stakeholders in the community and learn as much as possible about what residents think, feel, and want for their future.



Leadership

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CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Compensation and Benefits

The City offers the City Manager a \$2,400 annual utility credit

12.5% City paid retirement contribution to a 401(a) account

The City will cover your ICMA, GCCMA, and other professional development investments

- ☐ Vehicle or Vehicle Allowance will be provided ✓
- ☐
- ☐ City Utility Credit ✓
- ☐
- ☐ ICMA Retirement 401(a) program ✓
- ☐
- ☐ Professional Development ✓
- ☐
- ☐ Vacation and Sick Leave ✓
- ☐
- ☐ Health Insurance starts first day of employment ✓
- ☐
- ☐ Relocation Expenses ✓
- ☐
- ☐
- ☐ [For more information on City benefits click here](#)

City residency provides work/life balance with a short commute

City will provide you with the latest technology and equipment

Health Insurance is heavily subsidized for employees, including those with family coverage

The previous City Manager was paid an annual salary of \$195,000. The City is committed to negotiating a similar salary for this recruitment.

City Manager is required to live in the city limits during the term of their employment with the city.

The City is seeking stability and will present the successful candidate with a contract that encourages a long-term relationship.

Executive Search provided by:



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whutmacher@localgovexperts.com

www.sumterlocalgovconsulting.com



CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Apply to be the College Park City Manager

To apply for the College Park City Manager position, please send your resume and a two sentence value proposition articulating why you believe you are the right fit for this position.

Please send a resume and two sentence value proposition as a PDF to:

whutmacher@localgovexperts.com

Warren Hutmacher, Executive Recruiter

For more information on this position including supplementary documents and resources visit the recruitment webpage at www.sumterlocalgovconsulting.com/cocp-city-manager

The first review of resumes will take place on October 26, 2022.

Please refrain from communicating with the elected and officials and staff of the City of College Park. Please direct inquiries, concerns or problems to the Executive Recruiter.

Georgia Open Records legislation reasonably protects candidate's confidentiality. Once the City has identified a finalist group of three or less candidates, the names of the finalists are subject to be released upon an Open Records request.

Georgia law requires that the city wait 14 days from the announcement of a sole finalist until a final appointment can be voted on.

The College Park City Charter requires that the City Manager resides within the city limits of College Park during their employment as the city manager.

Executive Search provided by:



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whutmacher@localgovexperts.com

www.sumterlocalgovconsulting.com



CITY MANAGER RECRUITMENT

CITY OF COLLEGE PARK, GEORGIA

Hiring Process and Projected Timeline

RESUME & VALUE PROPOSITION

Email both documents to:
whutmacher@localgovexperts.com



FIRST REVIEW OF RESUMES

First review is on 10/26/22



SEMI-FINALIST INTERVIEWS

First interview with
Sumter Consulting

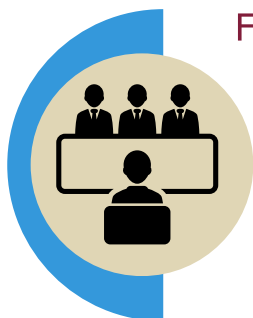
Projected date
1st week of November



FINALIST INTERVIEWS

Interviews with the
elected officials

Projected date
Middle of November



BACKGROUND CHECK & OFFER

Full background check to
include criminal and
credit check

Final candidate selected



Executive Search provided by:



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EXHIBIT C - EXAMPLE - INNOVATIVE INTERVIEW

EXHIBIT C - EXAMPLE - INNOVATIVE INTERVIEW

INNOVATIVE INTERVIEWS

The interview process is intended for candidates to be fully informed about their prospective employer as well as for the city to find out as much as it can about the candidate's abilities, qualifications, and character.

WHW LGC believes that there are methods outside the traditional interview process used to discover more about the applicant than a question and answer can produce.

When the City of Johns Creek was interviewing candidates for a Communication Director position, the ideal candidate profile called for the successful candidate to be capable of handling crisis communication while providing a sense of confidence and calm under heavy stress. They could have asked candidates to discuss a time in their careers when they dealt with a crisis, but instead the city created a crisis and put the applicants to the test....

Here is why WHW LGC approaches the recruitment process differently than other firms. The following is a retelling of a recruitment process Warren Hutmacher led for the City of Johns Creek, GA.

EXAMPLE: "THE CRISIS UNVEILED"

Candidates entered the conference room for their individual interviews opposite three similarly dressed interviewers representing the city. Hands are shaken, introductions made, and the interviews proceed like any other interview held by a city government. While the employer taking turns asking questions, the door suddenly comes flying open and a city staffer bellows into the room in an agitated state that the Communications Director candidate is urgently needed to help with a crisis in the making.

The candidate is whisked away to a separate conference room and is briefed by the Police Chief and Assistant City Manager regarding an officer involved shooting that

has just occurred. The facts are hazy and are dribbling in. The candidate is then asked to go to the PD Headquarters and interview the Sergeant and Lieutenant on duty when the shooting happened.

After talking with an obviously flustered Sergeant and an overly tight-lipped Lieutenant, the candidate must take this information and what he learned from the Chief and Assistant City Manager to craft an immediate action plan, a press release, and prepare for a press conference to be held in the next 30 minutes.

After 30 minutes alone with pen and paper, the candidate is taken by the Police Chief to the Roll Call room for a press conference. The video cameras are rolling, and a dozen city staff are in attendance. The candidate is called to the podium to give a statement and take questions from the "reporters" in the room. The candidate is peppered with questions, some of which are unfair, and some are hard hitting.

After this 30-minute exercise, the candidate is taken back to the original panel interview to brief the panelists as to how they think they did with the exercise and finish up their formal question and answer interview.

This process is repeated for all three finalists. The videos are compiled and the participants from the staff (Police Chief, Assistant City Manager, Sgt., Lt., and staff acting as reporters) gather to review the press releases, view the press conference videos, and conduct a full debrief on the entire exercise

The City Manager learned the following from this experience:

The first candidate panicked and was very uncomfortable in dealing with the crisis. He was pushed around by the "reporters" at the mock press conference. His answers, press release and leadership through the exercise did not meet the expectations for the job.

The second candidate's performance was rated as mediocre, she failed to keep certain confidential details off

the public record after being warned by the Chief of Police that certain facts were not to be shared publicly.

The last candidate was sharp, unaffected by the stress and handled the reporters politely and directed the answers toward the city's narrative. It didn't hurt that this candidate was the former public affairs Captain for the United States Navy's entire Pacific Fleet. When asked afterwards about the exercise, he joked that this crisis was rather easy to deal with compared to North Korea!

EXHIBIT D - EXAMPLES - SEMI-FINALIST REPORT



CITY OF COLLEGE PARK, GEORGIA

CITY MANAGER

RECRUITMENT



Initial Candidate Review

November 7th, 2022
Executive Session

Executive Search provided by:





CITY OF COLLEGE PARK, GEORGIA

Agenda - Initial Candidate Review

City Manager Recruitment

- Review of Process
- Review of Ideal Candidate Profile
- Review of Scoring Criteria - Initial Candidate Review
- Candidates - Initial Assessments
- Review Next Steps



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review

Review of Process

City Manager Recruitment

- Development of Ideal Candidate Profile and Recruitment Brochure
- Advertising
 - GLGA, ICMA and NFBPA
- Recruitment
 - LinkedIn, Email blast, Referrals, Attendance at ICMA Conference, Phone calls
- *Resume Review and Update with Elected Officials - Current Step*
- Initial Interviews for Semi-Finalists with Search Consultant
- Review of Semi-Finalist candidates with Elected Officials
- Interview Process with Elected Officials in College Park
- Background Investigations and Selection

CITY OF COLLEGE PARK, GEORGIA



The Ideal Candidate



- Integrity and the courage to effectively manage in a council-manager form of government
- College Park is an advanced class in city management with complex service delivery and financial models
- Adept at determining and ordering priorities; managing delegation of responsibilities to key staff
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- Humble and naturally helpful person
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- Keen eye for talent
- Resourceful problem solver willing to provide others credit
- Contributes to the profession and actively engages in professional development
- Always embodies integrity and is focused on the City’s best interests



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Scoring Criteria - Initial Candidate Review City Manager Recruitment

NOTES:

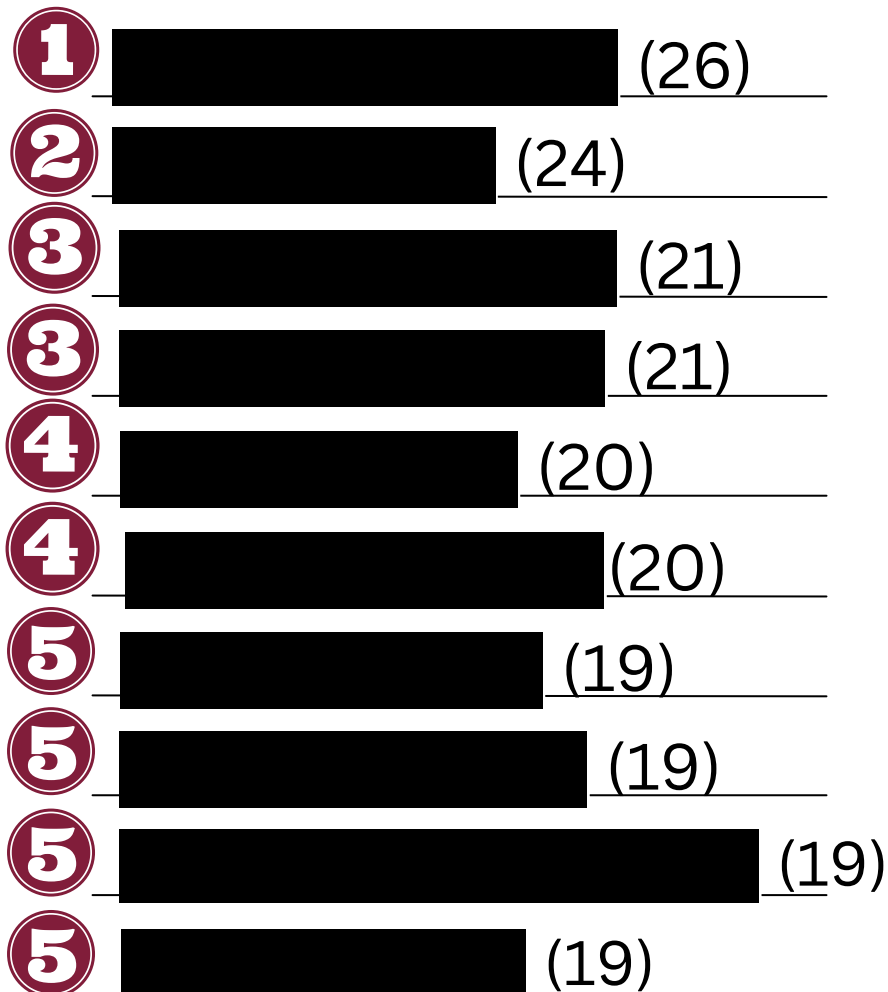
- *Criteria developed based on Ideal Candidate Profile - Qualifications solely based on resume review*
- *Maximum score in parenthesis for each category - Total Max (27)*
- Experience as a City Manager (5)
- Tenure as a City Manager (5)
- Experience as a City Manager in a City similar size as College Park (3)
- Education (5)
- Additional Experience in larger communities as an ACM (3)
- Utility Experience as a City Manager (3)
- Hospitality Experience as a City Manager (3)
- Prolonged absence from the City Manager field (-3)



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Scoring Criteria - Initial Candidate Review City Manager Recruitment

Candidate Rankings (1-10)

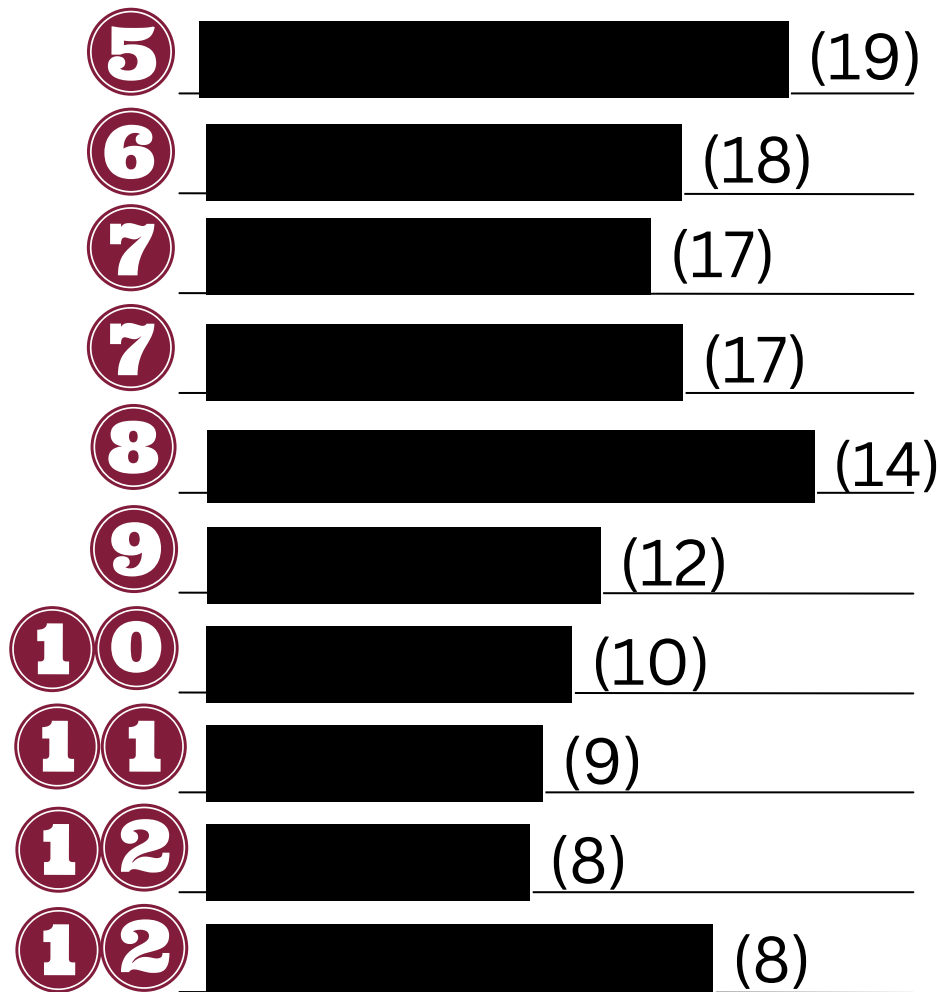




CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Scoring Criteria - Initial Candidate Review City Manager Recruitment

Candidate Rankings (11-20)

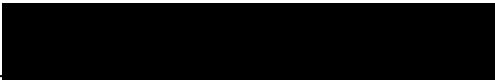
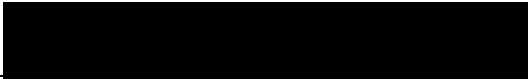




CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Scoring Criteria - Initial Candidate Review City Manager Recruitment

Candidate Rankings (21-27)

1	2		(8)
1	2		(8)
1	2		(8)
1	2		(8)
1	3		(7)
1	3		(7)
1	4		(5)



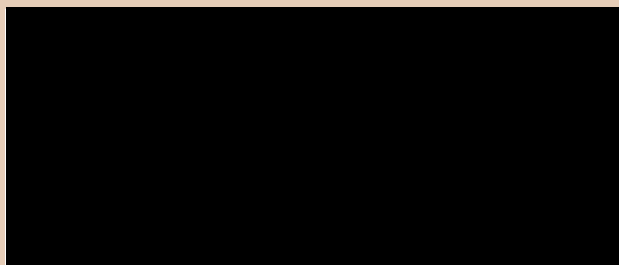
CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review

Recommended Candidates - Semi-Finalists **City Manager Recruitment**

- 11 candidates are recommended as Semi-Finalists
- Semi-Finalist candidates were selected who earned more than 70% of the available points
- Of the 11 Semi-Finalists:
 - All have City Manager Experience
 - All have earned at least a master's degree
 - A combined 125 years of City Manager experience
 - Come from 9 different states,
 - Only 3 are currently working in Georgia
 - Have worked in large, suburban and small communities
 - Only 1 female semi-finalist

MOST RECENT EMPLOYER



RANK #1

CANDIDATE

Value Proposition

Accomplished local government leader with 17 years of experience delivering quality and improved efficiencies, cost savings and excellence in customer service. Excellent organizational, leadership, financial, problem solving and negotiating skills coupled with a commitment and passion for serving internal and external customers.

Documented track record for leading high-performance teams, creating results-driven departments, developing talent and managing resources.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	4
Highest Population LGM	3
Education	5
ACM population greater than COCP	3
Utility Experience	3
Hospitality Experience	3
TOTAL SCORE	26

LAST 3 EMPLOYERS

City of [REDACTED] (5,667)

City Manager
2018 - Present

City of [REDACTED] (33,429)

City Manager
2011 - 2016

City of [REDACTED] (13,889)

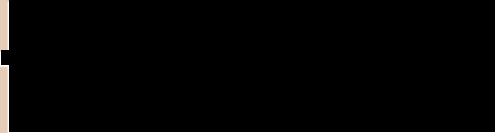
City Manager
2009 - 2011

EDUCATION

Hampton University
BS

Averett University
MBA

MOST RECENT EMPLOYER



RANK #2

CANDIDATE

Value Proposition

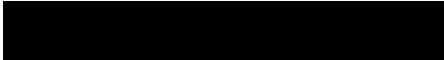
Innovative and visionary local government administrator, in multiple, challenging environments, I have built a reputation for strong, enthusiastic leadership and advocacy on behalf of my elected bosses.

I have championed the cause of strategic planning and economic sustainability; and, I have utilized creativity and non-traditional approaches to create success in the face of expected failure.

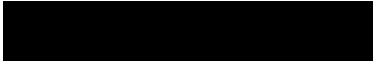
SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	5
Highest Population LGM	3
Education	5
ACM population greater than COCP	0
Utility Experience	3
Hospitality Experience	3
TOTAL SCORE	24

LAST 3 EMPLOYERS

 (51,000)

City Manager
2020 - 2022

 (78,000)

City Administrator
2017 - 2020

 (208,000)

Director of Economic and Business Development
2016 - 2017

EDUCATION

Western Michigan University
BS

Western Michigan
MPA

MOST RECENT EMPLOYER



RANK #3

CANDIDATE

Value Proposition

I am expressing my sincere desire to be the next City Manager of the exciting City of College Park, GA. My twenty-four years in City and County government along with my MPA from Valdosta State University, ICMA- Credential Manager certification makes me uniquely qualified for this position.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	5
Highest Population LGM	3
Education	5
ACM population greater than COCP	0
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	21

LAST 3 EMPLOYERS

[REDACTED] (147,651)

Operations Director
2022- Present

[REDACTED] (27,256)

City Manager
2018 - 2021

[REDACTED] (31,448)

City Manager
2016 - 2018

EDUCATION

Kent State University
BS

Valdosta State University
MPA

MOST RECENT EMPLOYER



RANK #3

CANDIDATE

Value Proposition

I offer my experience and skills developed over my public service career by successfully managing a traditional menu of public services, as well as municipal gas and electric utilities, municipal golf courses, and general aviation airport, and economic development/redevelopment.

I am adept in facilitating excellent intergovernmental relations, in earning and keeping the public trust with citizens establishing strong partnerships

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	5
Highest Population LGM	3
Education	5
ACM population greater than COCP	0
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	21

LAST 3 EMPLOYERS

 (41,500)

Operations Director
2017 - 2021

 (25,600)

City Manager
2009 - 2016

 (13,000)

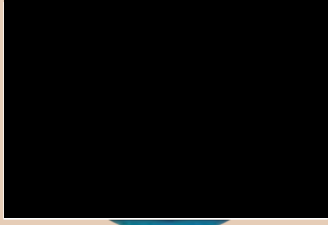
City Administrator
2004- 2008

EDUCATION

University of Notre Dame
BA

Indiana University
MPA

MOST RECENT EMPLOYER



RANK #4

CANDIDATE

Value Proposition

I am dynamic, a visionary, and competent leader and is an excellent fit for the City of College Park.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	4
Highest Population LGM	3
Education	5
ACM population greater than COCP	3
Utility Experience	3
Hospitality Experience	0
Years Removed from Local Government Management	-3
TOTAL SCORE	20

LAST 3 EMPLOYERS



2022 - Present



Deputy State Treasurer
2019 - 2021



City Manager
2004 - 2008

EDUCATION

Kent State University
BBA

University of Michigan
MPA

MOST RECENT EMPLOYER



RANK #4

CANDIDATE

Value Proposition

As a highly accomplished municipal employee, my experience aligns well with the qualifications you are seeking.

My knowledge of day-to-day operations, strategic planning, capital financing, project management, and public infrastructure replacement and financing is extensive.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	3
Highest Population LGM	3
Education	5
ACM population greater than COCP	1
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	20

LAST 3 EMPLOYERS

 (45,600)
2021 - Present

 (36,000)
City Manager
2013 - 2021

 (36,000)
Assistant City Manager/Economic Dev. Director
2008 - 2013

EDUCATION

Henderson State University
BA

Webster University
MPA

MOST RECENT EMPLOYER



RANK #5

CANDIDATE

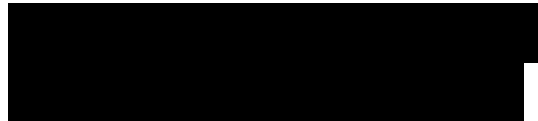
Value Proposition

Over 35 year's diverse professional experiences as a top public manager at all levels of the US intergovernmental system and internationally.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	3
Highest Population LGM	3
Education	5
ACM population greater than COCP	3
Utility Experience	3
Hospitality Experience	0
Years Removed from Local Government Management	-3
TOTAL SCORE	19

LAST 3 EMPLOYERS



Adjunct Professor
2009 - Present



Consultant
2008 - Present



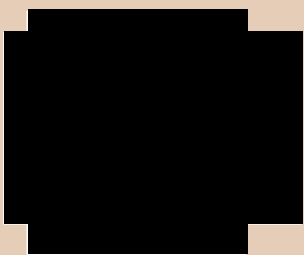
Assistant City Manager
2007-2008

EDUCATION

New School for Social Research
BA

University of Hartford
MPA

MOST RECENT EMPLOYER



RANK #5

CANDIDATE

Value Proposition

I believe my background, experience, and qualifications uniquely position myself to excel in this role.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	3
Highest Population LGM	3
Education	5
ACM population greater than COCP	0
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	19

LAST 3 EMPLOYERS

 (53,000)

Township Manager
2018 - Present

 (8,383)

Borough Manager
2018 - 2018

 (13,981)

Borough Manager
2017 - 2017

EDUCATION

Penn State University - Middletown
BS

Penn State University - Middletown
MPA

MOST RECENT EMPLOYER



RANK #5

CANDIDATE

Value Proposition

Based on 16 years of experience serving in communities ranging from complex urban centers, suburban bedroom communities, and small rural cities, the diversity of professional experiences expressed on my resume only captures a fragment of my qualifications.

I am an Atlanta native, have experience working with Fulton Co. and an appreciation of the value College Park brings to the State, I can add significant value delivering on the strategic initiatives set forth by City.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	2
Highest Population LGM	1
Education	5
ACM population greater than COCP	3
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	19

LAST 4 EMPLOYERS



Corporate Social Responsibility Manager
2022- Present



(496,461)

Deputy Chief Operating Officer
2019 - 2022



(127,358)

Assistant County Manager
2016 - 2019



(4,911)

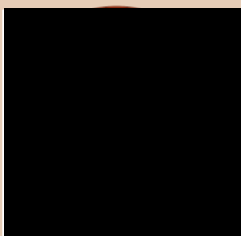
City Manager
2014 - 2016

EDUCATION

Georgia State University
BA

Valdosta State University
MPA

MOST RECENT EMPLOYER



RANK #5

CANDIDATE

Value Proposition

I believe in having a purpose. "People with purpose, goals, and a vision have no time for drama.

They invest their energy in creativity and focus on helping others live positive lives."

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	1
Highest Population LGM	2
Education	5
ACM population greater than COCP	3
Utility Experience	3
Hospitality Experience	0
TOTAL SCORE	19

LAST 3 EMPLOYERS

 (19,798)

City Manager
2021- Present

 (95,782)

Deputy and Assistant City Manager
2018 - 2021

 (632,464)

Water and Sewer - Deputy Chief Operating Officer
2016 - 2018

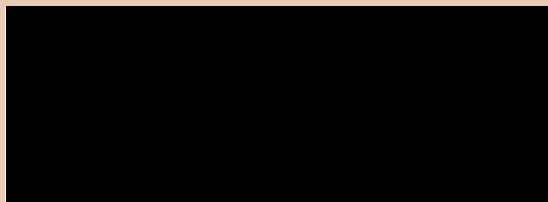
EDUCATION

Davenport University
BA

Keller Graduate School of Management
MBA

Argosy University
Doctorate

MOST RECENT EMPLOYER



RANK #5

CANDIDATE

Value Proposition

My background and abilities meet the City's expectations for an energetic and enthusiastic individual who is focused on developing fundamentally sound public policy solutions; a candidate who is a strong communicator, both verbally and in written practice with a proven track record of leadership, integrity, financial acumen, and managing difficult situations; an incumbent with an ability to establish and maintain a professional demeanor and effective working relationships.

SEMI-FINALIST SCORING

<u>Category</u>	<u>Score</u>
Highest Job Title	5
Years of Employment-LGM	3
Highest Population LGM	3
Education	5
ACM population greater than COCP	3
Utility Experience	0
Hospitality Experience	0
TOTAL SCORE	19

LAST 3 EMPLOYERS



Town Manager
2021- Present



(182,827)

Assistant City Manager
2011 - 2019



(92,000)

Assistant City Manager
2005 - 2011

EDUCATION

Troy University
BS

University of Virginia
MPA



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Fringe Candidates City Manager Recruitment

The following candidates are considered "fringe candidates" that are close to the 70% score mark or have favorable characteristics and backgrounds. While they aren't recommended as Semi-Finalists, they merit noting their backgrounds for your information:

- [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Fringe Candidates City Manager Recruitment

Fringe Candidates (Continued)

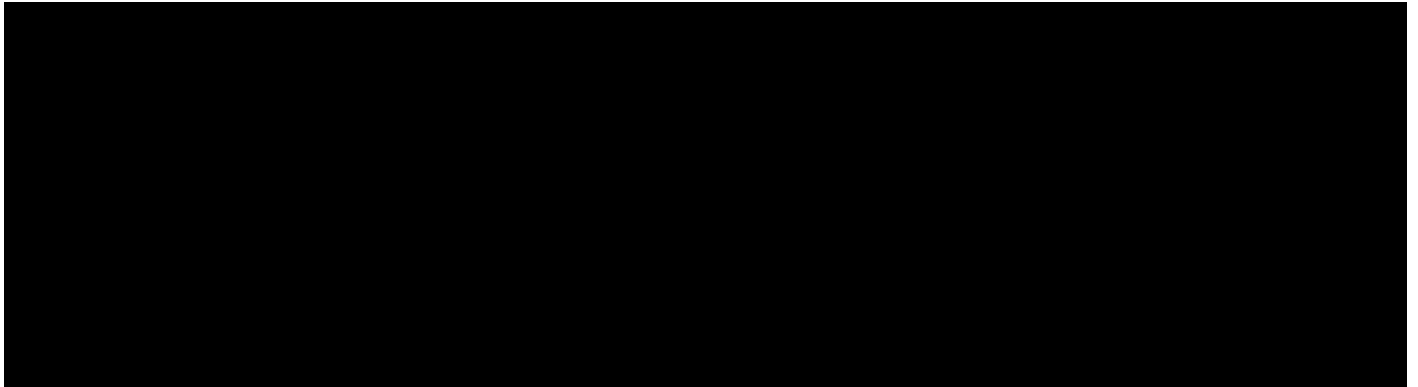
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
- [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]
 - [REDACTED]



CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review Rejected Candidates City Manager Recruitment

The following candidates are not recommended to proceed in this recruitment. They lacked the requisite credentials, experience or background to be considered viable candidates.





CITY OF COLLEGE PARK, GEORGIA

Initial Candidate Review

Next Steps

City Manager Recruitment

- Review with the elected officials the results of the interview process with the Semi-Finalist candidates
- Recommend finalists for the elected officials to interview and assess in late November/early December
- Recommend a process and plan for the elected officials to assess the final candidates in College Park in early to mid-December
- Background investigations and selection
- Offer, contract negotiations, and media strategy execution

**CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
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EXHIBITS

EXHIBIT "A"	Contact Sheet
EXHIBIT "B"	Public Entity Crimes
EXHIBIT "C"	Drug-Free Workplace Certification
EXHIBIT "D"	E-Verify Statement
EXHIBIT "E"	Proposer Acknowledgements and Agreements
EXHIBIT "F"	Conflict of Interest
EXHIBIT "G"	Non-Collusion Affidavit
EXHIBIT "H"	Disputes Disclosure

CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "A"
CONTACT SHEET

Name: SUMTER LOCAL GOVERNMENT CONSULTING

Federal Taxpayer ID: 87-3846352

Mailing Address: 9848 CAMERON PARC CI

City, State, & Zip Code: JOHNS CREEK, GA 30022

Telephone: 404-535-0525 Fax: _____

Email: whutmacher@localgovexperts.com

Submitted By: WARREN HUTMACHER

Title: PRESIDENT

Accounting Contact:

Name: WARREN HUTMACHER Title: PRESIDENT

Email Address: whutmacher@localgovexperts.com Phone: 404-535-0525

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "B"

SWORN STATEMENT UNDER F.S. SECTION 287.133(3) (A), ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract for RFP # 23-07 CITY MANAGER EXECUTIVE SEARCH SERVICES
2. This sworn statement is submitted by (entity) SUMTER LOCAL GOV CONSULTING whose business address is 9848 CAMERON PARK CIRCLE JONES CREEK, GA and (if applicable) Federal Employer Identification Number (FEIN) is 87-3846352 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)
3. My name is WARREN HUTMACHER and my relationship to the entity named above is PRESIDENT.
4. I understand that a "public entity crime" as defined in Paragraph 287.133(a) (g). Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or any agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
5. I understand that "convicted" or "conviction" as defined in paragraph 287.133(a) (b), Florida Statutes, means finding of guilt or a conviction of a public entity crime with or without an adjudication of guilt, in any federal or state trial court of records relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilty or nolo contendere.
6. I understand that an "affiliate" as defined in Paragraph 287.133(1) (a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime; or
 2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The City of Fernandina Beach, Florida ownership by one of shares constituting a controlling income among persons when not for fair interest in another person, or a pooling of equipment or income among persons when not for fair market value under a length

**CITY OF FERNANDINA BEACH, FLORIDA
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agreement, shall be a prima facie case that one person controls another person. A person who was knowingly convicted of a public entity crime, in Florida during the preceding 36 months shall be considered an affiliate.

7. I understand that a "person" as defined in Paragraph 287.133(1) (e), Florida Statutes, means any natural person or entity organized under the laws of the state or of the United States with the legal power to enter into a binding contract for provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.
8. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies)

☒ Neither the entity submitting this sworn statement, nor any officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, nor affiliate of the entity have been charged with and convicted of a public entity crime subsequent to July 1, 1989.

☐ The entity submitting this sworn statement, or one or more of the officers, directors, executives, partners, shareholders, employees, members, or agents who are active in management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. (Please attach a copy of the final order.)

☐ The person or affiliate was placed on the convicted FIRM list. There has been a subsequent proceeding before a hearing officer of the State of Florida, Division of Administrative Hearings. The final order entered by the hearing officer determined that it was in public interest to remove the person or affiliate from the convicted FIRM list. (Please attach a copy of the final order.)

☐ The person or affiliate has not been placed on the convicted FIRM list. (Please describe any action taken by, or pending with, the Department of General Services.)



Signature

3/24/23

Date:

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF ~~FLORIDA~~ GEORGIA
COUNTY OF COWETA

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24th day of MARCH, 2023, and is personally known to me, or has provided personally known as identification.



Notary Public
My Commission expires: 10/28/2024



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "C"
DRUG-FREE WORKPLACE CERTIFICATION

The below-signed INDIVIDUAL/FIRM certifies that it has implemented a drug-free workplace program. In order to have a drug-free workplace prepare, a business shall:

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

As the person authorized to sign this statement, I Certify that this firm complies fully with the above drug-free workplace requirements.

COMPANY: SUMTER LOCAL GOVERNMENT CONSULTING

CITY: JOHNS CREEK STATE: GA ZIP CODE: 30022

SIGNATURE: WA. HUT PHONE: 404-535-0525

NAME (TYPED OR PRINTED): WARREN HUTMACHER TITLE: PRESIDENT

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "D"
E-VERIFY STATEMENT

Bid/Proposal Number: RFP 23-07

Project Description: CITY MANAGER EXECUTIVE SEARCH SERVICES

I/FIRM acknowledges and agrees to the following:

I/FIRM shall utilize the U.S. Department of Homeland Security's E-Verify system, in accordance with the terms governing use of the system, to confirm the employment eligibility of:

1. All persons employed by the FIRM during the term of the Contract to perform employment duties within Florida; and
2. All persons assigned by the FIRM to perform work pursuant to the contract with the Department.

Individual/Company/Firm: SUMTER LOCAL GOVERNMENT CONSULTING

Authorized Signature: W.A. [Signature]

Title: PRESIDENT

Date: 3/27/23

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

**CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "E"

PROPOSER ACKNOWLEDGEMENTS AND AGREEMENTS

The undersigned, as an employee or agent of the Proposer, having the authority to sign a binding agreement on behalf of the corporation, company, or firm presenting this submittal, confirms understanding and/or agreement and/or takes exception with any statement in the following sections of this ITB/RFP document.

1. INTRODUCTION AND GENERAL INFORMATION
Understands and agrees to all terms.
2. PROPOSAL INSTRUCTIONS, TERMS AND CONDITIONS
Understands and agrees to all terms.
3. EVALUATION AND CONTRACT OVERVIEW
Understands and agrees to all terms.
4. PROPOSER'S RESPONSE: SUBMITTAL INFORMATION
Understands and agrees to all terms.
5. PROPOSER'S RESPONSE: PROPOSED TEAM
Understands and agrees to all terms.
6. PROPOSER'S RESPONSE: PROPOSED COMPENSATION
Understands and agrees to all terms.

Name: WARREN HUTMACHER Title: PRESIDENT

Signature: WA. HUT Date: 3/27/23

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "F"

CONFLICT OF INTEREST STATEMENT

This sworn statement is submitted with Bid, Proposal or Contract for 23-07 CITY MANAGER SEARCH SERVICES

This sworn statement is submitted by (entity) SUMTER LOCAL GOV CONSULTING whose business address is 9848 CAMERON PARK CT. JOHN'S CREEK, GA 30022 and (if applicable) Federal Employer Identification Number (FEIN) is 87-3846352 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is WARREN HUTMACHER and my relationship to the entity named above is PRESIDENT.

1. The above-named entity is submitting a Proposal for the City of Fernandina Beach.
2. The Affiant has made diligent inquiry and provides the information contained in the Affidavit based upon his/her own knowledge.
3. The Affiant states that only one submittal for the above proposal is being submitted and that the above-named entity has no financial interest in other entities submitting proposals for the same project.
4. Neither the Affiant nor the above-named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraints of free competitive pricing in connection with the entity's submittal for the above proposal. This statement restricts the discussion of pricing data until the completion of negotiations if necessary and execution of the Contract for this project.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participation in contract letting by any local, State, or Federal Agency.
6. Neither the entity nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
7. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with the City of Fernandina Beach.
8. I certify that no member of the entity's ownership or management, or staff has a vested interest in any aspect of the City of Fernandina Beach.
9. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above-named entity, will immediately notify the City of Fernandina Beach.

WA. HUTMACHER 3/29/23
Signature Date:

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

STATE OF ~~FLORIDA~~ GEORGIA
COUNTY OF Coweta

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24 day of March, 2023, and is personally known to me, or has provided personally known as identification.

[Signature]
Notary Signature

My Commission expires: 10/28/2024



THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL

CITY OF FERNANDINA BEACH, FLORIDA
REQUEST FOR PROPOSAL
RFP 23-07 CITY MANAGER EXECUTIVE SEARCH FIRM

EXHIBIT "G"

NON-COLLUSION AFFIDAVIT

This sworn statement is submitted with Bid, Proposal or Contract for 23-07 CITY MANAGER EXEC SEARCH SERVICES

This sworn statement is submitted by (entity) SUMTER LOCAL GOV CONSULTING whose business address is 9848 CAMERON PARK CIRCLE JOHN'S CREEK GA 30022 and (if applicable) Federal Employer Identification Number (FEIN) is 87-3746352 (If a Sole Proprietor and you have no FEIN, include the last four (4) digits of your Social Security Number: _____.)

My name is WARREN HUTMAKER and my relationship to the entity named above is PRESIDENT.

1. The above named is fully informed respecting the preparation and contents of the attached proposal and of all pertinent circumstances respecting such proposal;
2. Such Proposal is genuine and is not a collusive or sham proposal;
3. Neither the said Proposer nor any of its officers, partners, owners, agents, representatives, employees, or parties in interest, including this affiant, has in any way colluded, connived, or agreed, directly or indirectly, with any other Bidder, firm or person to submit a collusive or sham Proposal in connection with such Contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm, or person to fix the price or prices in the attached proposal or any other Bidder, or to fix any overhead, profit or cost element of the proposal price or the proposal price of any other Bidder, or to secure through any collusion, connivance, or unlawful agreement any advantage against the City of Fernandina Beach, Florida or any person interested in the proposed Contract; and
4. The price or prices quoted in the attached proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance, or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

WA [Signature] 3/24/23
Signature Date:

STATE OF ~~FLORIDA~~ GEORGIA
COUNTY OF _____

PERSONALLY APPEARED BEFORE ME, the undersigned authority, who, after first being sworn by me, affixed his/her signature at the space provided above on this 24 day of March, 2023, and is personally known to me, or has provided personally known as identification.

[Signature]
Notary Signature My Commission expires: 10/28/2024

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL



CITY OF FERNANDINA BEACH, FLORIDA
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EXHIBIT "H"
DISPUTES DISCLOSURE FORM

Answer the following questions by placing an "X" after "YES" or "NO". If you answer "YES", please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulations or any other regulatory agency or professional association within the last five (5) years?

YES ___ NO X

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES ___ NO X

Has your firm had against it or filed any request for equitable adjustment, contract claims, bid protest, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES ___ NO X

If yes, state the nature of the request for equitable adjustment, contract claim, litigation, or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement or misrepresentation or falsification of facts shall be cause for forfeiture of rights for further consideration of this proposal for the City of Fernandina Beach.

SUMTER LOCAL GOV CONSULTING
Firm

3/27/23
Date

WA (H)
Authorized Signature

WARREN BUTMACHER, PRESIDENT
Printed or Typed Name and Title

THIS FORM MUST BE INCLUDED WITH BID/PROPOSAL