

MIAMI BEACH

**PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES
FOR CITY MANAGER FOR MIAMI BEACH, FL**

Volume I: Letter of Interest

RFLI 2021-036-KB - EXECUTIVE RECRUITMENT SERVICES

Colin Baenziger & Associates

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

LETTER OF INTEREST TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES

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October 22, 2020

The Honorable Mayor Dan Gelber and Commissioners Ricky Arriola, Michael Góngora, Steven Meiner, David Richardson, Mark Samuelian, and Micky Steinberg
Attn: Kristy Bada, kristybada@miamibeachfl.gov
City of Miami Beach
1700 Convention Center Drive
Miami Beach, Florida 33139

The Honorable Mayor Gelber and Commissioners Arriola, Góngora, Meiner, Richardson, Samuelian, and Steinberg:

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

While CB&A is a nationwide municipal recruiting firm, our home base is Florida. In fact, we have been selected to perform 114 of the last 166 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 appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a great fit for you and your community. As a result, we only take a few clients at a time and focus on completing the assignment in an exemplary manner. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and selection. We also offer one of the better warranties in the industry.

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

Some of our Florida searches include City Managers for Aventura, Cooper City, Dania Beach, Destin, Fort Myers, Fruitland Park, Gainesville, Hallandale Beach, Key Biscayne, Madeira Beach, Melbourne, Miramar, Mount Dora, Ocala, Orange City, Palm Beach Gardens, Palm Coast, St. Pete Beach, Stuart, Tavares, and Treasure Island, and West Melbourne. Nationally we have found City Managers for Ankeny, IA; Bellevue, WA; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also sought the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia), County Managers for Brevard County, FL; 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 Manager for Lady Lake, FL, a Chief Administrative Officer for Renton, WA, and a Customer Service Chief for the Sewerage and Water Board of New Orleans.

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...

A. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with offices in Redmond, WA. As a sole proprietorship, we are not registered with any states 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. Our work is not done until you are satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our fee or in our action plan. When we do so, we do not ask for more than the originally quoted price. Rather, we accept these situations as part of our cost of doing business. We are your experts and once a contract is signed we have an obligation to fulfill its requirements with excellence, on time, and within budget, regardless of the circumstances.

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

Technical Capabilities and Organizational Structure

Colin Baenziger & Associates has developed its business model over the past 22 years. The model has proven to be extremely effective in wherever we have applied it. In fact, we are often called when a government has a particularly difficult position to fill or where one of our competitors has failed. Overall, we utilize approximately eighteen people.

Most staff members are independent contractors and are given assignments on a task order basis. Consequently, we can pay well while having a great deal of flexibility without the overhead of many firms.

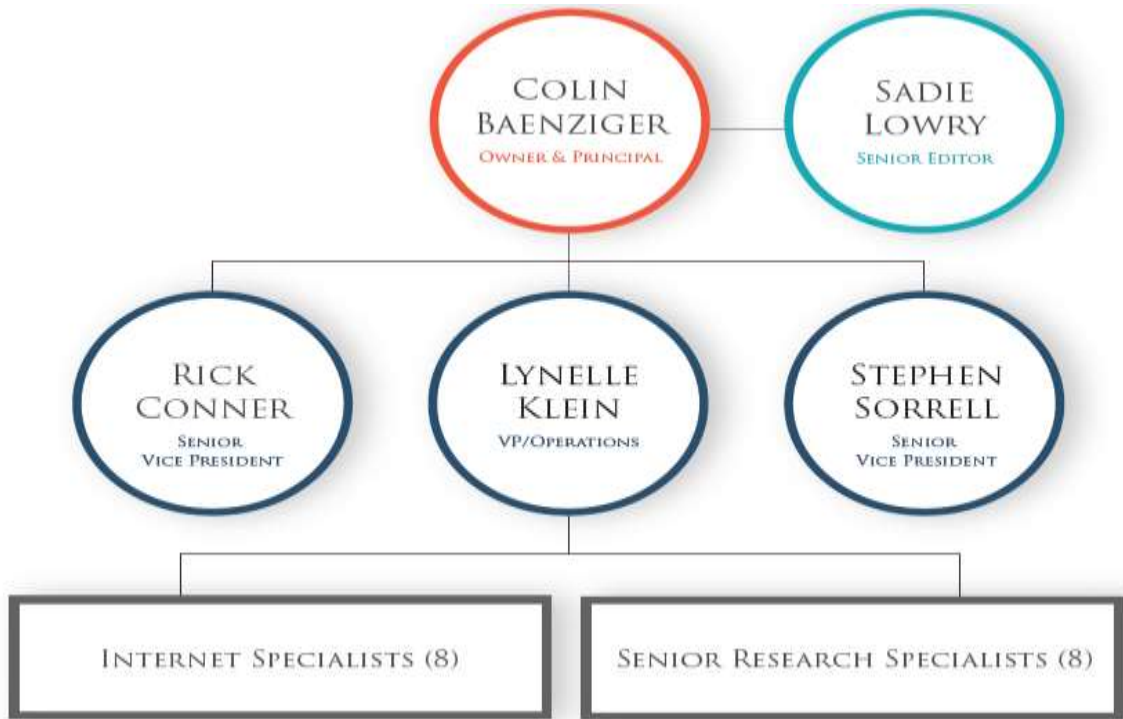
Completion of Projects within Budget

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 unforeseen circumstances may develop. ***We have never requested anything beyond the originally quoted price, even when we were probably entitled to do so.***

Completion of Projects on Schedule

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

A. Qualifications and Experience of the Firm (continued)



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, 29% of our placements have been females and/or minorities with the high in any given year being 47%.

Prior Names and Litigation

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

Insurance

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

A. Qualifications and Experience of the Firm (continued)

Overall Executive Search Experience

CB&A started its executive search business in 1998 from scratch. As a single father, he needed to stay nearby and so his goal was to become Florida's preeminent recruiter. In 2007 with his children mature, he branched out into other states. His firm has now worked in 34 states, from Maine to California and Florida to Alaska. See the map below.



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

A. Qualifications and Experience of the Firm (continued)

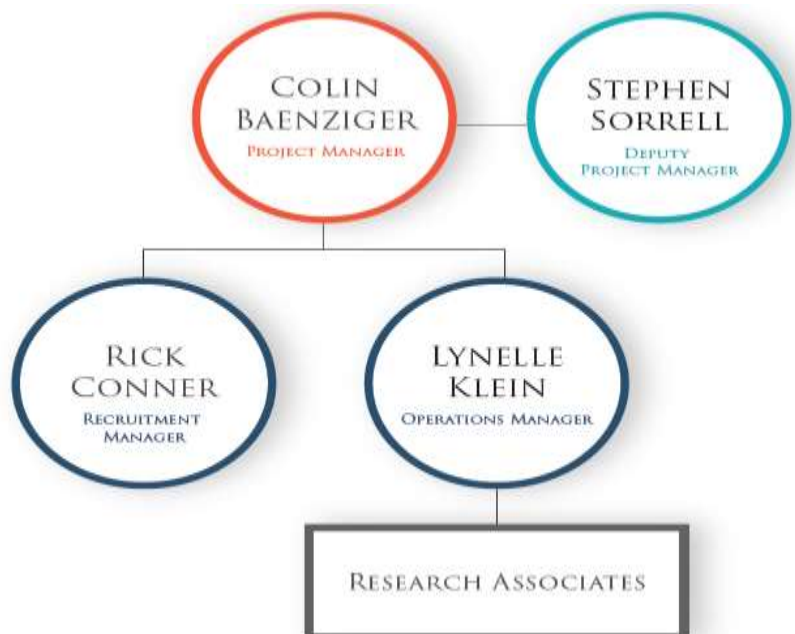
Project Team and Involvement

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

Stephen Sorrell, senior vice president, will be the Deputy Project Manager and support for Mr. Baenziger. Mr. Sorrell will assist in virtually every aspect of the search effort but will focus on the search for strong candidates and candidate evaluation. Stephen (Steve) Sorrell brings over 35 years of management and technical experience in municipal, county, state, and special district agencies to Colin Baenziger & Associates (CB&A). He earned his Bachelor of Science degree in civil engineering from University of Dayton and his Master’s degree in public administration from the University of Cincinnati.

Rick Conner, vice president, will serve as the recruitment manager and assist with the identification and screening of candidates. He has over 30 years of in local government and in executive recruiting. He earned Bachelors of Science Degrees in Business Administration and Engineering from the University of Missouri. In his spare time, he invents scuba diving equipment and accessories.

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



A. Qualifications and Experience of the Firm (continued)

Colin Baenziger, M.P.A.

Principal

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



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

- City Manager, Coral Gables, FL (population 42,000)
- City Manager, Cottonwood Heights, UT (population 34,000)
- City Manager, Bellevue, WA (population 122,400)
- City Manager, Fayetteville, NC (population 208,000)
- Village Manager, Key Biscayne, FL (population 11,000)
- Economic Development Director, Loudoun County, VA (population 326,000)
- Community Development Director, Miami, FL (population 373,000)
- Borough Manager, Matanuska-Susitna Borough, Alaska (population 88,000)
- City Manager, Mount Dora, FL (population 12,000)
- Town Manager, North Topsail Beach, NC (population 734)
- County Manager, Clackamas County, OR (population 380,000)
- City Manager, Palm Coast, FL (population 51,000)
- City Manager, Portland, ME (population 65,000)
- City Manager, Roanoke, VA (population 96,000)
- City Manager, Tacoma, WA (population 200,000)
- General Manager, Tampa Bay Water Authority (serving a population of 2.4 million)
- County Manager, Union County, NC (population 290,000)

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

Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association.

A. Qualifications and Experience of the Firm (continued)

Stephen W. Sorrell, P.E., M.P.A.

Senior Vice President

Stephen (Steve) Sorrell brings over 35 years of management and technical experience in municipal, county, state, and special district agencies to Colin Baenziger & Associates (CB&A). In a very real sense, he has seen government from all angles and knows how to cut through the bureaucratic fog. He actively gets to the root of the problem, builds a team with the necessary expertise and leads them developing and implementing the right solution. His skill in identifying the right people – exceptional people – and empowering them to get the job done is what has led to his success across all levels of government, and proven invaluable to CB&A.



Although Steve is a Professional Engineer, he relishes working with people – in seeing them for not just what they are but what they can be. He is a mentor who strives to develop not just himself but others. He uses his appetite for growth to inspire others. His areas of expertise are many: electronics and electrical systems, collective bargaining, real estate, welding, automotive mechanics, air conditioning and heating, law enforcement, water and wastewater systems, solid waste, recycling, compost operations, and environmental regulations. No area of management or subject area is obscure to him and that means he can take on virtually any search assignment comfortably.

Some of the top management and 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.

Over the years, Steve has been responsible for hiring, among others:

- Administrative Services Directors,
- Finance Directors,
- Engineering Directors,
- Fire Chiefs,
- IT Director,
- Police Chiefs, and
- Utilities Directors (in general operations as well as Electric and Gas).

Steve 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 was also a doctoral candidate at the University of Cincinnati. 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.

A. Qualifications and Experience of the Firm (continued)

Rick Conner, P.E.

Vice President

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



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

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

- City Manager of Sunny Isles Beach, FL,
- City Manager of Portland, TX,
- City Manager of Marble Falls, TX,
- Public Works Director of Nashville/Davidson County, TN, and
- Public Works Director of Bryan, TX.

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

- City Manager, Cocoa Beach, FL (population 11,200),
- City Manager, Fayetteville, NC (population 208,000),
- City Manager, Gainesville, FL (population 117,000)
- City Manager, Sarasota, FL (population 55,000),
- City Manager, Treasure Island, FL (population 6,900),
- City Manager, Winter Haven, FL (population 37,900),
- Executive Director, Bartow (FL) Airport Authority,
- Chief Executive Officer/General Manager, Des Moines (IA) Water Works,
- General Manager, Island Water Authority, Sanibel, FL, and
- Utility Director, Panama City, FL (population 28,300)

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

A. Qualifications and Experience of the Firm (continued)

Lynelle Klein

Vice President for Operations

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



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

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

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

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

B. Previous Similar Experience

2020 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	Town Manager	Bay Harbor Islands, FL	5,938	Maria Lasday	Executive Search for Village Manager
2	City Manager	Brighton, CO	41,254	Jane DiSessa	Executive Search for City Manager
3	City Manager	Cape Coral, FL	194,570	Rob Hernandez	Executive Search for City Manager
4	City Manager	Crescent City, FL	1,542	Michael Esposito	Executive Search for City Manager
5	City Manager	Doraville, GA	10,526	Chris Eldridge	Executive Search for City Manager
6	Town Manager	Montverde, FL	1,622	Paul Larino	Executive Search for City Manager
7	City Manager	Winchester, VA	28,108	Dan Hoffman	Executive Search for City Manager

2020 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Bay Harbor Islands, FL	Stephanie Bruder	(305) 866-6241	sbruder@bayharborislands-fl.gov	May 2020 to September 2020	\$26,500
2	Brighton, CO	Greg Mills	(303) 655-2268	gmills@brightonco.gov	May 2020 to August 2020	\$24,500+travel
3	Cape Coral, FL	Joe Coviello	(239) 574-0436	jcoviello@capecoral.net	February 2020 to June 2020	\$26,500
4	Crescent City, FL	Brett Peterson	(386) 698-2525	mayor@crescentcity-fl.com	June 2019 to January 2020	\$26,500
5	Doraville, GA	Joseph Geierman	(678) 373-9137	joseph.geierman@doravillega.us	February 2020 to June 2020	\$28,500
6	Montverde, FL	Allan Hartle	(407) 469-2681	ahartle@mymontverde.com	March 2020 to June 2020	\$26,500
7	Winchester, VA	John David Smith	(540) 667-1815	david.smith@winchesterva.gov	March 2020 to August 2020	\$28,500+travel

B. Previous Similar Experience (continued)

2019 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	County Manager	Clay County, FL	212,230	Howard Wanamaker	Executive Search for County Manager
2	City Manager	Clewiston, FL	7,943	Randy Martin	Executive Search for City Manager
3	City Manager	Deerfield Beach, FL	80,863	Dave Santucci	Executive Search for City Manager
4	City Manager	Gainesville, FL	133,857	Lee Feldman	Executive Search for City Manager
5	Town Manager	Mooresville, NC	35,300	Randy Hemann	Executive Search for Town Manager
6	City Manager	Opa-locka, FL	16,426	John Pate	Executive Search for City Manager
7	City Manager	Panama City Beach, FL	14,338	Tony O'Rourke	Executive Search for City Manager
8	City Manager	St. Pete Beach, FL	9,647	Alex Rey	Executive Search for City Manager
9	City Manager	Sammamish, WA	64,548	Rick Rudometkin	Executive Search for City Manager
10	City Manager	Vero Beach, FL	16,919	Monte Falls	Executive Search for City Manager
11	City Manager	Weston, FL	70,944	Don Decker	Executive Search for City Manager

2019 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Clay County, FL	Mike Cella	(904) 269-6394	mike.cella@claycountygov.com	March 2019 to June 2019	\$26,500
2	Clewiston, FL	Mali Gardner	(863) 983-1484	mali.gardner@clewiston-fl.gov	February 2019 to June 2019	\$26,500
3	Deerfield Beach, FL	Bill Ganz	(954) 816-1936	web.commission@Deerfield-Beach.com	June 2019 to September 2019	\$26,500
4	Gainesville, FL	Lauren Poe	352-334-5000	poelb@cityofgainesville.org	June 2019 to September 2019	\$26,500
5	Mooresville, NC	Miles Atkins	704-799-4210	matkins@moorevillenc.gov	March 2019 to July 2019	\$26,500
6	Opa-locka, FL	Matthew Pigatt	(305) 953-2868	mpigatt@opalockafl.gov	April 2019 to August 2019	\$26,500
7	Panama City Beach, FL	Paul Castro	(850) 832-5018	paulcasto@pcb.gov.com	September 2019 to December 2019	\$26,500
8	St. Pete Beach, FL	Alan Johnson	(727) 543.2794	ajohnson@stpetebeach.org	November 2018 to February 2019	\$26,500
9	Sammamish, WA	Karen Moran	425-295-0500	kmoran@sammamish.us	October 2018 to June 2019	\$26,500
10	Vero Beach, FL	Laura Moss	(772) 978-4700	Lmoss@covb.org	February 2018 to May 2019	\$26,500
11	Weston, FL	Daniel Stermer	954-205-9195	dstermer@westonfl.org	February 2019 to July 2019	\$26,500

B. Previous Similar Experience (continued)

2018 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Aventura, FL	37,724	Ronald Wasson	Executive Search for City Manager
2	City Administrator	Dickinson, ND	22,186	Joseph Gaa	Executive Search for City Administrator
3	City Manager	Groveland, FL	12,493	Mike Hein	Executive Search for City Manager
4	City Manager	Jacksonville Beach, FL	23,518	Mike Staffopoulous	Executive Search for City Manager
5	City Manager	Naples, FL	21,845	Charles Chapman	Executive Search for City Manager
6	Town Manager	North Topsail Beach, NC	734	Bryan Chadwick	Executive Search for Town Manager
7	City Manager	Sebastian, FL	24,772	Paul Carlisle	Executive Search for City Manager
8	Township Manager	Spring Garden, PA	12,840	Marcy Krum-Tinsley	Executive Search for Township Manager
9	City Manager	Sunnyside, WA	16,407	Martin Casey	Executive Search for City Manager

2018 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Aventura, FL	Enid Weisman	(305) 466-8900	eweisman@cityofaventura.com	July 2018 to October 2018	Under Warranty
2	Dickinson, ND	Scott Decker	(701) 483-8620	Scott_Decker@ndsupernet.com	June 2018 to October 2018	\$26,500
3	Groveland, FL	Mike Radzik	(352) 557-3066	Mike.Radzik@groveland-fl.gov	December 2017 to April 2018	\$26,500
4	Jacksonville Beach, FL	Charlie Latham	(904) 247-6100	CLatham@jaxbchfl.net	July 2018 to October 2018	\$26,500
5	Naples, FL	Bill Barnett	(239) 213-1000	mayorbill@naplesgov.com	May 2017 to September 2018	\$26,500
6	North Topsail Beach, NC	Daniel Tuman	(910) 328-2424	ntopsail@gmail.com	February 2018 to April 2018	\$26,500
7	Sebastian, FL	Jim Hill	(727) 224-5246	jhill@cityofsebastian.org	January 2018 to April 2018	\$26,500
8	Spring Garden, PA	Daniel Rooney	(717) 848-2858	drooney@sgtwp.org	March 2018 to June 2018	\$26,500
9	Sunnyside, WA	Francisco Guerrero	(509) 836-6305	fguerrero@sunnyside-wa.gov	July 2018 to October 2018	\$26,500

B. Previous Similar Experience (continued)

2017 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Auburn, AL	58,582	James Buston	Executive Search for City Manager
2	City Manager	Aventura, FL	37,724	Susan Grant	Executive Search for City Manager
3	City Manager	Burien, WA	50,500	Brian Wilson	Executive Search for City Manager
4	City Manager	Carnation, WA	1,873	Amy Arrington	Executive Search for City Manager
5	City Manager	Doraville, GA	10,896	Regina Williams-Gates	Executive Search for City Manager
6	City Manager	Fairborn, OH	33,452	Robert Anderson	Executive Search for City Manager
7	City Administrator	Lake Forest Park, WA	13,059	Phillip Hill	Executive Search for City Administrator
8	City Manager	Parkland, FL	28,200	Robert Payton	Executive Search for City Manager
9	City Manager	Petersburg, VA	32,123	Aretha Ferrell	Executive Search for City Manager
10	City Manager	Roanoke, VA	98,465	Bob Cowell	Executive Search for City Manager
11	City Manager	Stuart, FL	16,462	David Ross	Executive Search for City Manager
12	City Manager	Tacoma, WA	205,200	Elizabeth Pauli	Executive Search for City Manager
13	City Manager	Treasure Island, FL	6,783	Garry Brumback	Executive Search for City Manager
14	City Manager	Winter Haven, FL	36,500	Michael Herr	Executive Search for City Manager

2017 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Auburn, AL	Ron Anders	(334) 703-9000	randers@auburnalabama.org	July 2017 to October 2017	\$24,500
2	Aventura, FL	Enid Weisman	(305) 466-8900	eweisman@cityofaventura.com	June 2017 to September 2017	\$24,500
3	Burien, WA	Nancy Tosta	(206) 241-4647	nancyt@burienwa.gov	December 2016 to May 2017	\$24,500
4	Carnation, WA	Kim Lisk	(425) 333-4192	kim.lisk@carnationwa.gov	May 2017 to September 2017	\$24,500
5	Doraville, GA	Joseph Geierman	(678) 373-9137	joseph.geierman@doravillega.us	May 2017 to August 2017	\$24,500
6	Fairborn, OH	Paul Keller	(937) 754-3030	paul.keller@ci.fairborn.oh.us	October 2016 to February 2017	\$24,500
7	Lake Forest Park, WA	George Pandaleon	(206) 373-9857	pandaleong@cityoflakeforest.com	July 2017 to November 2017	\$24,500
8	Parkland, FL	Christine Hunschofsky	(954) 993-3009	chunschofsky@cityofparkland.org	January 2017 to May 2017	\$24,500
9	Petersburg, VA	Samuel Parham	(804) 586-5528	sparham@petersburg-va.org	February 2017 to June 2017	\$24,500
10	Roanoke, VA	Sherman Lea	(540) 853-2444	sherman.lea@roanokeva.gov	March 2017 to June 2017	\$24,500
11	Stuart, FL	Kelli Glass Leighton	772-288-5312	KLeighton@ci.stuart.fl.us	May 2017 to August 2017	\$24,500
12	Tacoma, WA	Robert Thoms	(253) 594-7848	robert.thoms@cityoftacoma.org	February 2017 to July 2017	\$24,500
13	Treasure Island, FL	Saleene Patridge	727-748-6281	spartridge@mytreasureisland.org	August 2017 to November 2017	\$24,500
14	Winter Haven, FL	Bradley Dantzler	(863) 289-9947	bdantzler@mywinterhaven.com	October 2016 to April 2017	\$24,500

B. Previous Similar Experience (continued)

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

2016 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Cocoa Beach, FL	Ben Malik	(321) 794-6668	Not available	April 2016 to June, 2016	\$24,500
2	Covington, VA	Thomas Sibold	(540) 958-8983	tsibold@covington.va.us	October 2015 to January 2016	\$24,500
3	Danville, VA	Sherman Saunders	(434) 489-8738	sherman.saunders@danvilleva.gov	May 2016 to August 2016	\$24,500
4	El Paso County, TX	Carlos Leon	(915) 546-2014	Commissioner1@epcounty.com	January 2016 to April 2016	\$24,500
5	Fort Myers, FL	Randall Henderson	(239) 321-7020	gpack@cityftmyers.com	November 2015 to February 2016	\$24,500
6	Fort Smith, AR	Andre Good	(479) 784-2208	Andre.Good@FortSmithAR.gov	December 2015 to March 2016	\$24,500
7	Gainesville, FL	Lauren Poe	352-334-5000	poelb@cityofgainesville.org	April 2016 – July 2016	\$24,500
8	Mountlake Terrace, WA	Rick Ryan	(425) 771-7068	Rryan@ci.mlt.wa.us	February 2016 to June 2016	\$24,500
9	Norwich, CT	Deberey Hinchey	(860) 823-3743	DHinchey@cityofnorwich.org	September 2015 to December 2015	\$24,500
10	Orange City, FL	Tom Laputka	(386) 775-5403	tlaputka@ourorangecity.com	November 2016 to January 2016	\$24,500
11	Port St. Lucie, FL	Greg Orevac	(772) 342-6072	mayor@cityofpsl.com	August 2016 to November 2016	\$24,500
12	Prosser, WA	Randy Taylor	(509) 875-4367	rtaylor@ci.prosser.wa.us	May 2016 to August 2016	\$24,500
13	Savannah, GA	Eddie DeLoach	(912) 210-1722	edeloach@savannahga.gov	April 2016 to July 2016	\$24,500
14	Springettsbury, PA	Mark Swomley	(717) 805-3093	mark.swomley@springettsbury.com	March 2016 to June 2016	\$24,500

B. Previous Similar Experience (continued)

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

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

2015 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Cocoa Beach, FL	Ben Malik	(321) 794-6668	Not available	January 2015 to March, 2015	\$24,500
2	Estero, FL	Nick Batos	(239) 292-2909	batos@estero-fl.gov	February 2015 to June 2015	\$7,100
3	Fernandina Beach, FL	John Miller	(904) 556-2299	jmiller@fbfl.org	June 2015 to September 2015	\$23,000
4	Fulton County, GA	Former Chair John Eves	(770) 847-7022	Not available	April 2015 to May 2015	\$7,500
5	Indianola, IA	Greg Marchant	(515) 491-1006	gmarchant@indianolaiowa.gov	September 2015 to December 2015	\$23,000
6	Mill Creek, WA	Former Mayor Pam Pruitt	(425) 338-7158	Not available	January 2015 to April 2015	\$23,250
7	Normandy Park, WA	Susan West	(206) 248-7603	Susan.West@ci.normandy-park.wa.us	May 2015 to July 2015	\$23,250
8	Ocala, FL	Kent Guinn	(352) 572-0312	kguinn@ocalafl.org	February 2015 to May 2015	\$23,250
9	Palm Bay, FL	William Capote	(321) 292-0382	Mayor@PalmBayFlorida.org	April 2015 to July 2015	\$24,250
10	Seminole, FL	Leslie Waters	(727) 430-7553	lwaters2@myseminole.com	April 2015 to June 2015	\$23,250
11	Sequim, WA	Candace Pratt	(360) 582-0114	cpratt@sequimwe.gov	March 2015 to June 2015	\$23,250
12	York County, VA	Thomas Shepperd, Jr.	(757) 868-8591	shepperd@yorkcounty.gov	January 2015 to April 2015	

C. Previous Similar Experience in Florida

Below is a list of the City / Town / County Manager searches we have conducted in Florida for the past five years:

2020 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	Town Manager	Bay Harbor Islands, FL	5,938	Maria Lasday	Executive Search for Village Manager
2	City Manager	Cape Coral, FL	194,570	Rob Hernandez	Executive Search for City Manager
3	City Manager	Crescent City, FL	1,542	Michael Esposito	Executive Search for City Manager
4	Town Manager	Montverde, FL	1,622	Paul Larino	Executive Search for City Manager

2020 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Bay Harbor Islands, FL	Stephanie Bruder	(305) 866-6241	sbruder@bayharborislands-fl.gov	May 2020 to September 2020	\$26,500
2	Cape Coral, FL	Joe Coviello	(239) 574-0436	jcoviello@capecoral.net	February 2020 to June 2020	\$26,500
3	Crescent City, FL	Brett Peterson	(386) 698-2525	mayor@crescentcity-fl.com	June 2019 to January 2020	\$26,500
4	Montverde, FL	Allan Hartle	(407) 469-2681	ahartle@mymontverde.com	March 2020 to June 2020	\$26,500

C. Previous Similar Experience in Florida (continued)

2019 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	County Manager	Clay County, FL	212,230	Howard Wanamaker	Executive Search for County Manager
2	City Manager	Clewiston, FL	7,943	Randy Martin	Executive Search for City Manager
3	City Manager	Deerfield Beach, FL	80,863	Dave Santucci	Executive Search for City Manager
4	City Manager	Gainesville, FL	133,857	Lee Feldman	Executive Search for City Manager
5	City Manager	Opa-locka, FL	16,426	John Pate	Executive Search for City Manager
6	City Manager	Panama City Beach, FL	14,338	Tony O'Rourke	Executive Search for City Manager
7	City Manager	St. Pete Beach, FL	9,647	Alex Rey	Executive Search for City Manager
8	City Manager	Vero Beach, FL	16,919	Monte Falls	Executive Search for City Manager
9	City Manager	Weston, FL	70,944	Don Decker	Executive Search for City Manager

2019 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Clay County, FL	Mike Cella	(904) 269-6394	mike.cella@claycountygov.com	March 2019 to June 2019	\$26,500
2	Clewiston, FL	Mali Gardner	(863) 983-1484	mali.gardner@clewiston-fl.gov	February 2019 to June 2019	\$26,500
3	Deerfield Beach, FL	Bill Ganz	(954) 816-1936	web.commission@Deerfield-Beach.com	June 2019 to September 2019	\$26,500
4	Gainesville, FL	Lauren Poe	352-334-5000	poelb@cityofgainesville.org	June 2019 to September 2019	\$26,500
5	Opa-locka, FL	Matthew Pigatt	(305) 953-2868	mpigatt@opalockafl.gov	April 2019 to August 2019	\$26,500
6	Panama City Beach, FL	Paul Castro	(850) 832-5018	paulcastro@pcb.gov	September 2019 to December 2019	\$26,500
7	St. Pete Beach, FL	Alan Johnson	(727) 543.2794	ajohnson@stpetebeach.org	November 2018 to February 2019	\$26,500
8	Vero Beach, FL	Laura Moss	(772) 978-4700	Lmoss@covb.org	February 2018 to May 2019	\$26,500
9	Weston, FL	Daniel Stermer	954-205-9195	dstermer@westonfl.org	February 2019 to July 2019	\$26,500

C. Previous Similar Experience in Florida (continued)

2018 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Aventura, FL	37,724	Ronald Wasson	Executive Search for City Manager
2	City Manager	Groveland, FL	12,493	Mike Hein	Executive Search for City Manager
3	City Manager	Jacksonville Beach, FL	23,518	Mike Staffopoulous	Executive Search for City Manager
4	City Manager	Naples, FL	21,845	Charles Chapman	Executive Search for City Manager
5	City Manager	Sebastian, FL	24,772	Paul Carlisle	Executive Search for City Manager

2018 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Aventura, FL	Enid Weisman	(305) 466-8900	eweisman@cityofaventura.com	July 2018 to October 2018	Under Warranty
2	Groveland, FL	Mike Radzik	(352) 557-3066	Mike.Radzik@groveland-fl.gov	December 2017 to April 2018	\$26,500
3	Jacksonville Beach, FL	Charlie Latham	(904) 247-6100	CLatham@jaxbchfl.net	July 2018 to October 2018	\$26,500
4	Naples, FL	Bill Barnett	(239) 213-1000	mayorbill@naplesgov.com	May 2017 to September 2018	\$26,500
5	Sebastian, FL	Jim Hill	(727) 224-5246	jhill@cityofsebastian.org	January 2018 to April 2018	\$26,500

C. Previous Similar Experience in Florida (continued)

2017 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Aventura, FL	37,724	Susan Grant	Executive Search for City Manager
2	City Manager	Parkland, FL	28,200	Robert Payton	Executive Search for City Manager
3	City Manager	Stuart, FL	16,462	David Ross	Executive Search for City Manager
4	City Manager	Treasure Island, FL	6,783	Garry Brumback	Executive Search for City Manager
5	City Manager	Winter Haven, FL	36,500	Michael Herr	Executive Search for City Manager

2017 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Aventura, FL	Enid Weisman	(305) 466-8900	eweisman@cityofaventura.com	June 2017 to September 2017	\$24,500
2	Parkland, FL	Christine Hunschofsky	(954) 993-3009	chunschofsky@cityofparkland.org	January 2017 to May 2017	\$24,500
3	Stuart, FL	Kelli Glass Leighton	772-288-5312	KLeighton@ci.stuart.fl.us	May 2017 to August 2017	\$24,500
4	Treasure Island, FL	Saleene Patridge	727-748-6281	spartridge@mytreasureisland.org	August 2017 to November 2017	\$24,500
5	Winter Haven, FL	Bradley Dantzler	(863) 289-9947	bdantzler@mywinterhaven.com	October 2016 to April 2017	\$24,500

C. Previous Similar Experience in Florida (continued)

2016 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Cocoa Beach, FL	11,200	James McKnight	Executive Search for City Manager
2	City Manager	Fort Myers, FL	70,918	Saeed Kazemi	Executive Search for City Manager
3	City Manager	Gainesville, FL	117,000	Anthony Lyons	Executive Search for City Manager
4	City Manager	Orange City, FL	11,600	Dale Arrington	Executive Search for City Manager
5	City Manager	Port St. Lucie, FL	178,590	Russ Blackburn	Executive Search for City Manager

2016 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Cocoa Beach, FL	Ben Malik	(321) 794-6668	Not available	April 2016 to June, 2016	\$24,500
2	Fort Myers, FL	Randall Henderson	(239) 321-7020	gpack@cityftmyers.com	November 2015 to February 2016	\$24,500
3	Gainesville, FL	Lauren Poe	352-334-5000	poelb@cityofgainesville.org	April 2016 – July 2016	\$24,500
4	Orange City, FL	Tom Laputka	(386) 775-5403	tlaputka@ourorangecity.com	November 2016 to January 2016	\$24,500
5	Port St. Lucie, FL	Greg Orevac	(772) 342-6072	mayor@cityofpsl.com	August 2016 to November 2016	\$24,500

C. Previous Similar Experience in Florida (continued)

2015 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Summary of Engagement
1	City Manager	Cocoa Beach, FL	11,200	Ron McLemore	Executive Search for City Manager
2	Village Manager	Estero, FL	23,100	Steve Sarkozy	Executive Search for County Manager
3	City Manager	Fernandina Beach, FL	12,000	Dale Martin	Executive Search for City Manager
4	City Manager	Ocala, FL	56,600	John Zobler	Executive Search for City Manager
5	City Manager	Palm Bay, FL	105,000	Greg Lynk	Executive Search for City Manager
6	City Manager	Seminole, FL	17,800	Ann Deal	Executive Search for City Manager

2015 City / County Manager Searches Completed (continued)						
	Client	Contact Name	Phone	Email	Dates of Engagement	Fees Received
1	Cocoa Beach, FL	Ben Malik	(321) 794-6668	Not available	January 2015 to March, 2015	\$24,500
2	Estero, FL	Nick Batos	(239) 292-2909	batos@estero-fl.gov	February 2015 to June 2015	\$7,100
3	Fernandina Beach, FL	John Miller	(904) 556-2299	jmiller@fbfl.org	June 2015 to September 2015	\$23,000
4	Ocala, FL	Kent Guinn	(352) 572-0312	kguinn@ocalafl.org	February 2015 to May 2015	\$23,250
5	Palm Bay, FL	William Capote	(321) 292-0382	Mayor@PalmBayFlorida.org	April 2015 to July 2015	\$24,250
6	Seminole, FL	Leslie Waters	(727) 430-7553	lwaters2@myseminole.com	April 2015 to June 2015	\$23,250

D. Other Related Experience

Please see Appendix A for a complete list of our searches.

E. Proposed Work Plan

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

Phase I: Information Gathering and Needs Assessment

Task One: Needs Assessment

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

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

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

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

Note: Ideally these meetings will be in person but recognizing the current pandemic, we may need to conduct them via video conferencing.

Task Two: Develop Position Description and Recruitment Materials

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

E. Proposed Work Plan (continued)

Phase II: Recruitment

Task Three: Recruit Candidates

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

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

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

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

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

E. 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 high quality candidates.

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

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

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

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to prepare a written introduction to themselves as part of their preliminary background checks. This is done for several reasons. First, it allows the candidates to tell their own story and balance the negativity that is so often characteristic of the press. It also allows the City to evaluate the candidates written and communicative skills.
- **Candidate Disclosure Statement:** We will ask candidates if there is anything controversial in their background that we should be made aware of prior to further consideration. While it is unlikely that we find anything not previously publicized in the press, we believe redundant checks offer superior security for our client.
- **Interviews of References:** We tell the candidate with whom we wish to speak. These include current and former Commission Members, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, and others who know the candidate. We also attempt to contact some individuals who are not on the candidate's list. Typically, we reach eight to ten people and prepare a written summary of each conversation.
- **Legal Checks:** Through our third party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state and national level; civil records for any litigation at the county and federal level; and bankruptcy and credit.

Search the Internet and Newspaper Archives: Virtually every local newspaper has an archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the

E. Proposed Work Plan *(continued)*

governing body. Of course, not all news sources are unbiased, and we consider that in our evaluation. This step is conducted in order to quickly discover candidates with problems in their backgrounds and eliminate them.

- **Verification of Education:** We also verify claimed educational degrees to assure the candidate is being totally forthright.
- **Verification of Work History:** We verify employment for the past fifteen years.

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

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

Task Five: Preparation and Presentation of Candidate Materials

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

Task Six: Finalist Selection

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

Task Seven: Notify All Candidates of Their Status

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

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

E. Proposed Work Plan (continued)

Phase IV: Coordinate the Interview Process and City Manager Selection

Task Eight: Coordinate the Candidate Assessment Process

Prior to the interviews, we will recommend an interview/assessment process for the City's review including means to evaluate the candidates' communication skills, interpersonal skills, and decision-making skills. As part of the process, we suggest the Mayor and Commission observe the finalists in several settings. These would typically include a social setting, one-on-one interviews, and in a commission meeting setting. Some aspects of this process may need to be modified depending on medical recommendations at the time.

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

Later, that evening, the Mayor and Commission hosts a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. Your next City Manager will, after all, represent your local government in numerous venues. It is thus important to know how the individual will respond in a social setting. The reception also serves as an ice-breaker whereby the Commission Members and the candidates get to know one another informally.

Day #2: In the morning, each candidate will interview individually with each elected official for approximately 40 minutes. These meetings provide the Mayor and Commission Members with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, Managers succeed and fail based on their interaction with the Mayor and Commission and the one-on-one interviews are an excellent way to test that interaction.

After lunch, the Mayor and Commission as a group will interview each candidate 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 will recommend you invite the finalists' spouses, so they can spend time in and evaluate your community.

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 the desired outcome.

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

E. Proposed Work Plan *(continued)*

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

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

Task Eleven: Continuing Assistance

Our work is not done when the contract is executed. We will stay in touch with you and your new City Manager. Our goal is to be there to assist in resolving any issues that arise before they become intractable. In fact, at your request, we will conduct a team-building workshop, at no charge, to resolve any difficulties. We simply feel it is part of our job to assure a successful relationship.

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

The City's Obligations

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

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

E. Proposed Work Plan *(continued)*

Proposed Project Schedule

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

Phase I: Needs Assessment / Information Gathering

- November 11th: CB&A begins meeting with the Commission Members and, if suggested, other stake holders to understand the job and its challenges.
- November 17th: CB&A submits the draft of the full recruitment profile to the City for its review.
- November 24th: City provides comments on the recruitment profile.

Phase II: Recruiting

- November 27th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 13,800 local government professionals.
- December 28th: Closing date for submission of applications.
- January 5th: CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

- January 25th: CB&A forwards its reports and materials to the City for the recommended candidates. These will include the candidates' resumes and introduction as well as the results of our reference, background and Internet/newspaper archives checks.
- February 1st: City selects / confirms the finalists for interviews.

Phase IV: Interview Process Coordination and City Manager Selection

- February 11th: City holds reception for the finalists.
- February 12th: 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.

F. Price Proposal and Warranty

Fee

CB&A offers a firm, fixed price of \$26,500, which includes all expenses, except the costs associated with bringing the finalists to interview with the City (travel, meals, hotel etc.), and those associated with all consultant travel, meals, and lodging. Bills (including travel costs) 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	\$ 3,000
Phase II: Recruiting	11,000
Phase III: Screening	10,000
Phase IV: Interview Process Coordination and Selection	1,500
Phase V: Negotiation and Continuing Assistance	1,000
Firm, Fixed Fee Total*	\$26,500

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

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 the City instructs us with conducting a full search (Phases I-V) and assuming it selects from among the candidates we recommend, we warrant the following:

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