



Presque Isle City Council Meeting

Thursday, September 14, 2023

at 12:00 PM

Presque Isle Council Chambers

AGENDA

Call to Order

Pledge of Allegiance

New Business

1. Review City Manager Recruitment Proposals

Adjournment

PRESQUE ISLE CITY COUNCIL MEETING

For:

September 14, 2023

AGENDA ITEM # 1

SUBJECT

NEW BUSINESS: City Manager Recruitment Proposals

INFORMATION

- 1) Municipal Resources, Inc.
- 2) Maine Municipal Association
- 3) Eaton Peabody Consulting Group
- 4) Municipal Solutions
- 5) Municipal Solutions Report
- 6) Municipal Solutions Example
- 7) Strategic Government Resources

REQUESTED ACTION

FOR REVIEW

66 Main Street, Suite B
Plymouth, NH 03264

119 International Drive
Portsmouth, NH 03801



Telephone: (603) 279-0352
Toll Free: (866) 501-0352

all@mrigov.com
www.mrigov.com

LETTER OF INTEREST

September 6, 2023

Martin Puckett, City Manager
City of Presque Isle, ME
12 Second Street
Presque Isle, ME 04769

Response to RFP: City Manager Recruitment

Municipal Resources, Inc. ("MRI") is pleased to submit this response to your request for qualifications to work with the City of Presque Isle in the recruitment and selection of an exceptional candidate for the position of City Manager.

MRI offers two levels of recruitment, an all-inclusive "comprehensive" recruitment and a recruitment "assistance" service which is typically one-third to half the cost of a comprehensive recruitment.

MRI has more than 30 years of experience with public sector executive recruitments and our record for helping municipalities identify and select candidates with the right "fit" is impressive. By investing time and energy to learn about the specific challenges of the job and understand the personality of the community, we can identify candidates with the right blend of management skill, leadership style, values, philosophy, and approach to ensure a "fit" for success and long tenure. Because the scope of services offered by MRI across the region and our many contacts, particularly in New England, MRI can leverage those contacts to directly recruit quality candidates.

Although a full client list is attached (**Appendix A**), MRI has specialized in New England recruitments, and we feel no other firm has more experience or a longer reach than MRI. MRI has some familiarity with Presque Isle having completed Fire and Police Public Safety Studies there in 2011. Please see below for a brief listing of references, and recent contracts.

UNIQUE SERVICES IN PUBLIC SECTOR RECRUITMENT

MRI has been serving municipalities for more than 30 years. Although our focus is New England, we have provided services to more than 500 municipalities throughout New England and beyond. We use this “reach” to benefit our clients. In conducting recruitment and selection services, we endeavor to do more than merely match candidates to job openings:

- We profile *your* community in a way that highlights the unique attributes that make it a desirable opportunity for potential candidates.
- We work closely with you to understand the leadership and management aspects of the position that may be unique to your community in order to establish and clarify job expectations.
- We actively seek out and recruit candidates that we believe would be a good potential match for your community.
- We work closely with each applicant to help them understand the position requirements and the expectations you have for the successful candidate while keeping them abreast of their status at each step in the selection process.
- We recognize that the client is not only hiring a senior executive but may very well be bringing an entire family into the community. Consequently, we work with the applicants to enable them to learn as much as possible about the region as well as the client community, and we help the client prepare to support the assimilation of the new manager. We are also careful to ensure that economic expectations and family needs or special circumstances are clearly understood early in the selection process.
- We stay actively involved through the final selection and formal appointment. Our objective is to initiate and establish long-term, successful relationships between the individuals we help place and our clients.

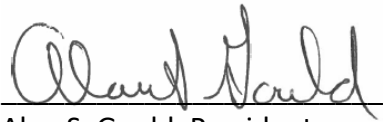
Alan Gould, President, will act as the Principal-In-Charge and Project Manager for this project and will oversee all aspects of the recruitment process. The proposed project team is outlined in our response to the RFQ; members assigned to this team are veterans of similar projects and have specialized in Maine recruitments.

We understand that every community is different; therefore, every search is different. MRI works hard to understand the intricacies and uniqueness of each client’s organization and then tailors the process to meet their specific needs and expectations.

We look forward to the possibility of working with the City of Presque Isle on this project. Please feel free to contact us if you have any questions or need additional information.

Respectfully submitted,

MUNICIPAL RESOURCES, INC.



Alan S. Gould, President

Municipal Resources, Inc.

66 Main Street, Suite B, Plymouth NH 03264

119 International Drive, Portsmouth, NH 03801

(603) 279-0352

(603) 765-5998 Cell

agould@mrigov.com

ABOUT MUNICIPAL RESOURCES

All Principal Consultants affiliated with the firm have substantial experience in government service, a background which proves beneficial to our clients, as we are able to fully understand and address the issues and concerns of the officials and decision-makers with whom we do business.

We believe that Municipal Resources has the best collection of talent that any consultant can produce at any price. Generally, our affiliates are current or recently retired practitioners in their field. They have held or hold positions at or near the top in their respective fields.

In order to provide a higher level of service to our clients, a team of MRI consultants will be assigned to this project. This approach gives us a wider outreach to actively recruit the best candidates and to provide a higher level of screening for the candidate pool. The team of consultants assigned to this recruitment would be as follows:

CORPORATE STRUCTURE

MRI is an S Corporation registered in New Hampshire, with the following officers:

Alan S. Gould, President and Chief Operating Officer

Christian Pearsall, Board of Directors, Treasurer

John Deachman, Esquire, Secretary

Justin Van Etten, Chairman, Board of Directors, Co-Owner

Donald R. Jutton, Sr., Founder and Member, Board of Directors, Co-Owner



SCOPE OF SERVICES - RECRUITMENT “ASSISTANCE” SERVICE

1. We can develop ad copy, recommend advertising venues, and coordinate placement of the ads (advertising costs are billed directly to the client unless otherwise agreed). Resumes are typically received for 30 days, and, with the authorization of the client, can be reviewed on a “rolling” basis in order to expedite the hiring process in an extremely competitive hiring environment.
2. We can assist the hiring authority, as desired, throughout the selection and hiring process.
3. We can research MRI’s database and contact potential candidates from other similar recruitments we have conducted in the past 12 months.
4. We can canvass MRI’s professional network to identify and reach out to promising potential candidates to invite their application.
5. We will receive and hold all resumes in confidence until the semi-finalists are chosen for an interview. We have found that assured confidentiality will increase the number and quality of applicants rather significantly. We acknowledge receipt of all resumes and keep candidates apprised of their status at each selection point throughout the process.
6. We can screen and review all resumes.
7. We can distribute essay questions to the top tier of candidates. The essay questions will focus on areas of special interest to the City.
8. We can conduct a web search of the top candidates and canvass our consultants, to identify potential issues or controversies in other jurisdictions.
9. We can conduct telephone interviews with the remaining candidates, placing the focus on current position and reasons for leaving; career history of successes and failures; future personal and professional goals; and their understanding of best practices and contemporary professional thinking in the field, and if included essay responses. We forward the submittals of the top candidates to the client for local interviews with the hiring authority.
10. We can assist and prepare the hiring authority for interviews and facilitate those interviews, providing technical input, if desired.

FEES AND CHARGES

Our services for this recruitment/selection assistance process will be provided at an **hourly rate of \$105.00**. Since this is not a comprehensive recruitment package, the client will pay for only those steps in the process that are authorized by the client.

ADVERTISING ALLOWANCE

We suggest an advertising budget of **\$1,000.00**. Advertising venues will be selected upon consultation with the client and MRI will be reimbursed for advertising expenses.

OPTIONAL – FINAL CANDIDATE BACKGROUND CHECK

Once a candidate and the client have signed a conditional offer of employment, MRI will perform an in-depth background check on the final candidate which shall include, but not be limited to, previous employment, and criminal and motor vehicle records checks for a flat fee of **\$1,500.00**. The background check will be billed separately upon completion.

In order to protect the client, MRI will typically not complete a comprehensive background on a candidate before a conditional offer of employment is accepted, unless the City provides a waiver. This is to protect the city from any claims of discrimination, in the event that something is discovered during the investigation that establishes the candidate as a protected class.

PRINCIPAL-IN-CHARGE and PROJECT MANAGER

Alan S. Gould, President and Chief Operating Officer, is a graduate of Saint Anselm College with a BS degree in Criminal Justice. He is certified as a Public Manager by the American Academy of Certified Public Managers and has completed numerous management and leadership programs including the Babson Command Training Institute and the FBI's LEEDS program. He is recognized for his creativity in community policing and his leadership in promoting ethics in the law enforcement community. Mr. Gould began his public sector career with the Salem, NH, Police Department where, during his 21 years, he served at all ranks of the Department. He served as Chief of Police in Rye, NH, where, upon retirement from law enforcement, he was appointed and served as Town Administrator until joining MRI in 2008. Mr. Gould served as the Ethics Instructor at the New Hampshire Police Academy for 15 years and has been an instructor of college courses in Criminal Code, Criminal Investigation, Report Writing, Constitutional Law, and Juvenile Delinquency. Among his many community involvements, Alan served as an initial incorporator of two non-profit organizations; one addressing family violence and visitation issues, and the other established to help seniors remain in their homes as they age. He continues to serve as Deputy Emergency Management Director in the coastal community of Rye, NH, located within

the Seabrook Nuclear Power Plant's Emergency Planning Zone. In addition to his responsibilities as MRI's Chief Operating Officer, Mr. Gould manages most of the company's public safety projects including operational studies and "internal" investigations. Mr. Gould also specializes in recruitment/selection processes for executive-level municipal positions and has completed hundreds of processes for top management positions throughout New England.

PROJECT TEAM MEMBERS

Scott Myers has over 25 years of municipal experience in New Hampshire. Mr. Myers served as City Manager for Laconia, NH for 11 years, retiring in 2022, and was a 4-term popularly elected Mayor of Dover, NH. He served for over 10 years on the NHMA Board of Directors, including 2 years as Chair. Scott also served on the Board of Directors of HealthTrust, a municipal health insurance risk pool, and served 4 years as a Trustee of the New Hampshire Retirement System. He has extensive experience in many facets of municipal government including Administration, Budgets, Capital Improvements, Human Resources, Insurance and Economic Development, as well as large and small project management oversight. During his career, Scott regularly communicated with State and Federal officials on matters of importance to his community and the State as a whole. He is respected for his ability to successfully maintain positive working relationships with elected officials, employees, unions, and the public. Scott is an MRI Senior Consultant specializing in municipal management and recruitment.

Carol M. Granfield, ICMA-CM, has a Masters in Administration from Central Michigan University and is one of 1446 ICMA Credentialed Managers in the country. Ms. Granfield is also a graduate of the Senior Executive Institute at the University of Virginia, Harvard JF Kennedy School of Government summer program, Leadership New Hampshire, and Fairfax, and one year of law school at Massachusetts School of Law. She is an adjunct professor at Granite State College where she teaches Human Resources and Public Administration. She serves as NASPAA accreditation site reviewer of MPA programs. She possesses over 38 years of public sector management experience and 9 years of private sector experience. Ms. Granfield, a native of Pittsfield, Massachusetts, has broad public service experience at the town, city, and county levels of government. Ms. Granfield has served in Town Administrator/Town Manager positions in large and small communities in New Hampshire (Derry, Meredith, Hooksett, Moultonborough), and also as County Manager in Cumberland County, Maine; Town Manager in Dixfield, Kittery, and Eliot Maine; Director of Administration in Herndon, Virginia; and Personnel Director in Fairfax, Virginia. Ms. Granfield's expertise in Human Resources and Labor Relations includes the establishment of personnel policies; organizational studies; wage, classification, and benefit studies along with union negotiations to include the interest-based model. Ms. Granfield is co-author of the ICMA e-book, *Performance Appraisal Fundamentals: A Quick Guide to Fair, Consistent, and Useful Performance Appraisals*. Ms. Granfield has participated in many successful public sector executive recruitment projects and has also conducted strategic planning, goal setting, and team building programs in NH, ME, and VA communities. She has also developed and implemented positive career development and training programs for employees of a number of municipal organizations. Ms. Granfield has given presentations at national conferences of the

ICMA, IPMA-HR, IACP and at state conferences in VA, MA, ME, and NH. She was previously adjunct faculty at George Mason University. Ms. Granfield has served on many professional and civic boards including ICMA Credentialing Board; NH Local Government Board, Maine Municipal Association Advisory Board, Belknap County Economic Development Commission, Derry Planning Board, and is Past President of the NH Management Association, IPMA-Virginia, Dixfield Economic Development Organization, and the Derry Village Rotary. Ms. Granfield is also appointed by the Governor to the NH Public Employee Labor Relations Board. As an MRI Senior Management consultant, Ms. Granfield specializes in wage & classification, staffing and organizational studies, recruitments, and interim management assignments.

TIMELINE

The following schedule represents the typical timeline MRI would like to meet in the recruitment and selection process. As you will see, the approximate 30 day run time for resume submission is the longest period of time over which we have no control. During this period, resumes are being received, acknowledged, and scored, while we are gathering information that will help us to narrow the field and develop essay questions. Once the resumes have been scored, things will move along pretty quickly.

Since there is little room for “compression” of this schedule, any delays will need to be added to the end of the process. The background investigation on the selected candidate will likely take about two weeks. During that two-week period, we will be assisting the Client with contract negotiations. We normally expect a two - or four-week delay between the signing of a final contract with the start date of the chosen candidate since he or she likely has a contractual obligation to a current employer.

In our experience, if a process runs significantly longer than the 3 months outlined in this schedule, desirable candidates may withdraw for other employment opportunities.

PROPOSED TIMELINE

TASK	WEEK #											
	1	2	3	4	5	6	7	8	9	10	11	12
Community Profile & Challenge Statement and Recruitment Plan												
Meetings with Board and Designees												
Develop Position Advertisement, Community Profile & Challenge Statement												
Finalize Timeline												
Place Advertisements												
Develop Essay Questions												
Active Recruitment and Review of Submissions												
Accept and Review submissions												
Recruit qualified candidates from MRI's professional network												
Deadline and Final resume scoring. First cut of candidates.												
Send and review candidate Essays												
Preliminary background work on candidates												
Second cut and Telephone Interviews												
Selection of semi-finalists												
Interviews												
Candidate Interviews - Committee and Board												
Next Steps as determined by consultation w/Board												
Conditional Offer and Background												
Negotiation of Contract												
Comprehensive Background Investigation												

REFERENCES and RECENT CONTRACTS

Berwick, ME

Town Manager & Interim Town Manager 2015

Bryan O'Connor, Chairman
Berwick Selectmen
11 Sullivan Street
Berwick, ME 03901
(207) 698-1101

Portland, ME

City Manager Recruitment 2015 Director of Emergency Communications 2023

Brendan O'Connell, Finance Director
Gina Tapp, HR Director
City of Portland
389 Congress Street
Portland, ME 04101
(207) 874-8300

Sabattus, ME

Interim Town Manager & Community Development 2011 Town Manager 2009

Board of Selectmen
Town of Sabattus
190 Middle Road
Sabattus, ME 04280
(207) 375-4331

Somerset County, ME

County Administrator 2013

Earla J. Haggerty
Interim County Administrator
Somerset County
41 Court Street
Skowhegan, ME 04976

Presque Isle, ME

Organizational Study 2011

James Bennett, former City Manager
205 Main Street
Biddeford, ME 04005
(207) 571-0700

South Portland, ME

Police Chief Assessment 2021

Stephanie Weaver, Director of HR
City of South Portland
South Portland, ME 04106 (207) 767-7667

Westbrook, ME

Policy Update and Development 2020

Chief Janine Roberts
570 Main Street
Westbrook, Maine (207) 854-0644

York, ME

Police Chief Recruitment 2022

Stephen H. Burns, Town Manager
Town of York
186 York Street
York, ME 0390

Gray, ME

Fire Mentoring 2020, Fire Service Technical Assistance 2020

(207) 657-3339

New Gloucester, ME

Fire, DPW Risk Assessment 2020

(207) 926-4126

Litchfield, NH

Police Chief Recruitment 2023

F. Robert Leary, Board of Selectmen-Chair
2 Liberty Way, Suite 2
Litchfield, NH 03052
(603) 424-4046

New Hampton, NH

Town Administrator Recruitment 2023
Michael A. Drake, Board of Selectmen-Chair
New Hampton, NH 03256
(603) 744-3559

Thornton, NH

Town Administrator 2022

Town Administrator 2017
John Paul Hilliard, Board of Selectmen, Chairman
16 Merrill Access Road
Thornton, NH 03285
(603) 726-8168

Merrimack, NH

Public Works Director Recruitment 2022

Paul Micali, Town Manager
6 Baboosic Lake Road
Merrimack, NH 03054
(603) 424-2331

Johnson, VT / Village of Johnson
Town Administrator Recruitment 2023
Duncan Hastings, Town Administrator
Village Manager Recruitment 2022
Steven Hatfield, Trustee Chair
Johnson, VT
(802) 635-2611

Newport, VT
City Manager Recruitment 2023
Laura Dolgin, City Manager
Newport, VT 05855
(802) 334-2112

Thetford, VT
Town Manager Recruitment 2023
Sharon Harkay, Selectboard-Chair
3910 Route 113
Thetford, VT 05075
(802) 785-2922

Westminster, VT
Town Manager Recruitment 2023
Katrina Hamilton, Selectboard, Chair
3651 U.S. Route 5
Westminster, VT 05158
(802) 722-4255

Berlin, MA
Town Administrator 2022
Margaret Nartowicz, Town Administrator
(outgoing)
(978) 310-5919

Blackstone, MA
Town Administrator 2022
Ryan Chamberland, Chair of the Board
Mary Bulso, Board member
(508) 883-1500 x 102

Duxbury, MA
Police Chief Recruitment 2023
Rene Read, Town Manager
Duxbury, MA 02332
(781) 934-1100

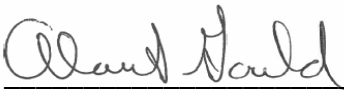
Rutland, MA
Police Lieutenant Recruit/Assessment 2023
Austin Cyganiewicz, Town Administrator
Rutland, MA 01543
(508) 886-4100

Westford, MA
Town Manager 2022
Andrea Peraner-Sweet. Select Board, Chair
Kristen Las, Town Manager
Westford, MA 01886
978-692-5515

See **Appendix A** for additional references/full client list.

Respectfully submitted,

MUNICIPAL RESOURCES, INC.

By: 

Alan S. Gould, President
Municipal Resources, Inc.
66 Main Street, Suite B, Plymouth NH 03264
119 International Drive, Portsmouth, NH 03801
(603) 279-0352 or (603) 765-5998 Cell
agould@mrigov.com

APPENDIX A



**Municipal
Resources, Inc.**

MANAGEMENT RECRUITMENT REFERENCES

MASSACHUSETTS

Acton, MA

Town Manager 2018
Land Use & Econ. Dev. Director 2015
Steven Ledoux, Town Manager
472 Main Street
Acton, MA 01720
(978) 929-6611

Amesbury, MA

CFO Recruitment Assistance 2019
Ken Gray, Mayor
62 Friend Street
Amesbury, MA 01913
(978) 388-8121

Andover, MA

Finance Director 2011
Police Chief Recruitment 2013
Steven Bucuzzo, Asst. Town Manager
36 Bartlet Street
Andover, MA 01810
(978) 632-8220

Ashland, MA

Town Manager 2012
Steven Mitchell, Chairman
Board of Selectmen
101 Main Street
Ashland, MA 01721
(508) 881-0100

Assumption College

Public Safety Director 2013
Christian McCarthy
Executive Vice President & Treasurer
Assumption College, Finance Office
500 Salisbury Street
Worcester, MA 01609
(508) 767-7424

Avon, MA

Deputy Police Chief Recruitment 2022
Jeffrey J. Bukunt, Chief of Police
Avon Police Department
86 Fagan Dr.
Avon, MA 02322
(508) 583-6677

Barre, MA

Town Administrator 2023
Greg Balukonis, Interim Town Administrator
40 West Street
Barre, MA 01005
(978) 355-2504

Bedford, MA

Town Manager 2018
Richard T. Reed
10 Mudge Way
Bedford, MA 01730
(781) 275-1111

Berlin, MA

Town Manager 2019, 2022
Fire Chief Recruitment 2019, 2022
R. Scott Hawkins
Selectboard, Chair
Kristin Rubin
Town Administrator
Town of Berlin
23 Linden Street
Berlin, MA 01503

Blackstone, MA

Town Administrator Recruitment 2021, 2023
Ryan Chamberland
Board of Selectmen, Chairman
15 St. Paul Street
Blackstone, MA 01504

Boxford, MA

Town Administrator 2021
Tim Feeny, Chair
7A Spofford Road
Boxford, MA 01921

Boylston, MA

Town Administrator 2008
Kenneth Sydow, Selectman
221 Main Street
Boylston, MA 01505
(617) 654-3697

Canton, MA

Town Administrator 2016
Jody Middleton
Human Resources Director
801 Washington Street
Canton, MA 02021
(781) 821-2936

Carver, MA

Town Administrator Recruitment 2022
Select Board
108 Main Street
Carver, MA 02330
(508) 866-3401

Concord, MA

Town Manager 2019
Parks & Rec Director 2016
Christopher Whelan, Town Manager
PO Box 535
22 Monument Square
Concord, MA 01742
(978) 318-3000

Danvers, MA

Town Manager 2014
Steve Bartha
Town Manager
One Sylvan Street
Danvers, MA 01923
(978) 777-0001

Dartmouth, MA

Town Administrator 2017
Executive Administrator 2009
Police Chief 2009
David Cressman, Town Adm.
400 Slocum Road
Dartmouth, MA 02747
(508) 910-1820

Dighton, MA

Town Administrator 2017
John P. Taylor, Chairman
Dighton Board of Selectmen
979 Somerset Avenue
Dighton, MA 02715
(508) 669-6431

Duxbury, MA

Police Chief Recruitment 2023
Rene Read, Town Manager
878 Tremont Street
Duxbury, MA 02332
(781) 934-1100

Everett, MA

Chief Financial Officer 2015
Kevin O'Donnell
Human Resource Director
City of Everett
484 Broadway, Everett MA 02149
(617) 394-2282

Georgetown, MA

Town Administrator 2021
Town of Georgetown
1 Library Street
Georgetown, MA 01833

Hanover, MA

Director of Comm Dev & Planning 2018
Town Manager Recruitment 2017
Brian Barthelmes, Selectman
550 Hanover Street
Hanover, MA 02339
(781) 826-5000

Hadley, MA

Town Administrator 2020
Christian Stanley, Selectboard Chair
100 Middle Street
Hadley, MA 01035
(413) 586-0221

Hanson, MA

Town Administrator 2020
Laura Fitzgerald-Kemmett
Chair, Board of Selectmen
542 Liberty Street
Hanson, MA 02341
(781) 293-5186



MASSACHUSETTS CONTINUED

Hubbardston, MA

Town Administrator 2022
Jeff Williams, Chair, Select Board
7 Main Street # 12
Hubbardston, MA 01452
(978) 928-5244

Kingston, MA

Town Administrator 2013
Nancy M. Howlett
Acting Town Administrator/
Chief Procurement Officer
26 Evergreen Street
Kingston, MA 02364
(781) 585-0500

Lakeville, MA

Town Administrator 2021
Board of Selectmen
346 Bedford Street
Lakeville, MA 02347
(508) 946-8803

Leicester, MA

Town Administrator 2013
Doug Belanger, Chairman
Leicester Board of Selectmen
3 Washburn Square
Leicester, MA 01524
(508) 892-7000

Lenox, MA

Town Manager Recruitment 2013
David Roche, Chairman
Lenox Board of Selectmen
Town Hall
6 Walker Street
Lenox, MA 01240
(413) 637-5500, x-7

Lexington, MA

Town Manager 2018
James Malloy
Town Manager
2nd Floor, Town Office Building
1625 Massachusetts Ave
Lexington, MA 02420
(781) 698-4581

Manchester-by-the-Sea, MA

Police Chief Recruitment & Assessment
Center 2016
Fire Chief Recruitment & Assessment
Center 2016
Police/Fire/EMS Studies 2015
DPW Director Recruitment 2014
Dispatch Study 2014
Town Admin Recruitment 2012
Police Chief Recruitment 2007
Gregory Federspiel, Town Administrator
Manchester-by-the-Sea, MA 01944
(978) 526-2000

Marblehead, MA

Town Administrator Recruitment 2011
Anthony M. Sasso, Town Administrator
Abbot Hall
188 Washington Street
Marblehead, MA 01945
(781) 631-0000

Mendon, MA

Town Administrator 2013
Fire Chief 2018
Diane Willoughby, Admin. Asst.
20 Main Street
Mendon, MA 01756
(508) 473-2312

Middleton, MA

Town Administrator 2023
Brian Cresta, Select Board
Kosta Prentakis, Select Board
(978) 777-3617
Town Administrator 2015
Christine Lindberg, Chair Selectmen
48 South Main Street
Middleton, MA 01949
(978) 774-3589

Monson, MA

Town Administrator 2013
Edward A. Maia, Chairman
Monson Board of Selectmen
29 Thompson Street
Monson, MA
(413) 267-4100

Nahant, MA

Town Administrator 2015
Mary Ellen Schumann
Administrative Assistant
334 Nahant Road
Nahant, MA 01908
(781) 581-0088

Newton, MA

HR Director 2016
Mary O'Neill
Human Resources Recruiting Manager
City of Newton
1000 Commonwealth Ave.
Newton Center, MA 02459
(617) 796-1265

North Andover, MA

Town Manager 2019
Board of Selectmen
Town of North Andover
120 Main Street
North Andover, MA 01845

Northborough, MA

Town Administrator Recruitment 2023
John W. Coderre, Town Administrator
63 Main Street
Northborough, MA 01532
(508) 393-5040

Plainville, MA

Town Administrator 2015
Plainville Board of Selectmen
PO Box 1717
142 South Street
Plainville, MA 02762
(508) 695-3142

Princeton, MA

Police Chief Recruitment 2023
Sherry Patch, Town Administrator
6 Town Hall Drive
Princeton, MA 01541
(978-464-2102

Rutland, MA

Police Lieutenant Recruit/Assessment 2023
Austin Cyganiewicz, Town Administrator
250 Main Street
Rutland, MA 01543
(508) 886-4100

Seekonk, MA

Town Administrator 2013
Nelson Almeida, Chairperson
Seekonk Board of Selectmen
100 Peck Street
Seekonk, MA 02771
(508) 336-2910

Sherborn, MA

Town Administrator 2022
Select Board
19 Washington Street
Sherborn, MA 01770

Somerset, MA

Town Administrator 2022
Board of Selectman
140 Wood Street
Somerset, MA 02726
(508) 646-2800

Southborough, MA

Fire Chief 2018
Mark J. Purple, Town Administrator
Town of Southborough
17 Common Street
Southborough, MA 01772

Southbridge, MA

Town Manager 2015
Town Manager's Office
41 Elm Street
Southbridge, MA 01550
(508) 764-5405

Sudbury, MA

Director of Public Works 2016
Town Manager 2015
Patty Golden, Senior Administrative Assistant
to the Town Manager
Board of Selectmen's Office
278 Old Sudbury Road
Sudbury, MA 01776
(978) 639-3382



MASSACHUSETTS CONTINUED**Upton, MA**

Town Manager 2017
James Brochu, Chairman
Upton Board of Selectmen
One Main Street
Upton, MA 01568
(508) 529-6901

Uxbridge, MA

Police Chief Recruitment 2018
Angie Ellison, Town Manager
21 South Main Street
Uxbridge, MA 01569
(508) 278-8600

Wayland, MA

Town Administrator 2013
Board of Selectmen
41 Cochituate Road
Wayland, MA 01778
(508) 358-7710

Wenham, MA

Town Administrator 2019
Police Captain 2017
Finance Director/Town Accountant 2016
Town Administrator 2015
Jack Wilhelm, Chairman
138 Main Street
Wenham, MA 01984
(978) 468-5520

Westborough, MA

Town Manager 2019
Board of Selectmen
Town of Westborough
34 West Main Street
Westborough, MA 01581

Westford, MA

Town Manager 2022
Andrea Peraner-Sweet
Select Board, Chair
Kristen Las, Town Manager
55 Main Street
Westford, MA 01886
978-692-5515

NEW HAMPSHIRE**Allenstown, NH**

Town Administrator 2018
Town Administrator 2010
Board of Selectmen
16 School Street
Allenstown, NH 03275
(603) 485-4276

Amherst, NH

Town Administrator 2018
Finance Director 2016, 2021
James O'Mara, Town Administrator
2 Main Street
PO Box 960
Amherst, NH 03031-0960
(603) 673-6041

Ashland, NH

Town Manager Recruitment 2021
Board of Selectmen
PO Box 517
Ashland, NH 03217

Atkinson, NH

Town Administrator 2021
Town Administrator 2019
Board of Selectmen
Town of Atkinson
21 Academy Avenue
Atkinson, NH 03811

Auburn, NH

Town Administrator 2022
Library Director 2012
Library Board of Trustees
Griffin Free Public Library
22 Hooksett Road
Auburn, NH 03032

Barrington, NH

Finance/HR Director 2016
John Scruton, Town Administrator
PO Box 660
333 Calef Highway (Route 125)
Barrington, NH 03825
(603) 664-7395

Bedford, NH

Finance Director 2015
Town Manager 2013
Town Manager 2012
Police Chief 2011
Town Manager
24 North Amherst Road
Bedford, NH 03110
(603) 472-5242, x-300

Belmont, NH

Town Planner Recruitment 2021
Interim DPW Director 2017
Alicia Jipson, Town Administrator
143 Main Street
Belmont, NH 03220
(603) 267-8300

Berlin, NH

Interim DPW Director 2021
Philip Warren, City Manager
168 Main Street
Berlin, NH 03570

Bradford, NH

PT Fire Chief Recruitment 2019
Karen Hambleton, Town Administrator
Bradford Area Community Center
134 East Main Street
PO Box 6
Bradford, NH 03221

Brookline, NH

Town Administrator 2022
Town of Brookline
Attn: Drew Kellner
1 Main Street
Brookline, NH 03033-0360

Campton, NH

Town Administrator 2015, 2021
Sharon Davis, Chairman
Campton Board of Selectmen
10 Gearty Way
Campton, NH 03223
(603) 726-3223

Canaan, NH

Town Administrator Recruitment 2023
Stephen Freese, Select Board - Chair
1169 US Route 4
Canaan, NH 03741
(603) 523-4501

Carroll County, NH

HR Director Recruitment 2019
County Commissioners Office
95 Water Village Road
Ossipee, NH 03864

Claremont, NH

DPW Professional Development 2022
City Manager Recruitment 2021-2022
City Manager Recruitment 2016
Charlene Lovett, Mayor
City of Claremont
58 Opera House Square
Claremont, NH 03743
(603) 542-7002



NEW HAMPSHIRE CONTINUED

Deering, NH

Fire Chief Recruitment 2016
Town Administrator 2021-2022
Peter Flynn, Town Administrator
762 Deering Center Road
Deering, NH 03244
(603) 464-3248

Derry, NH

Town Administrator 2016
Town Administrator 2010
Larry Budreau, Human Resources Dir.
14 Manning Street
Derry, NH 03038
(603) 845-5403

East Kingston, NH

Clerk 2011
Matthew Dworman, Chairman
Board of Selectmen
24 Depot Road
East Kingston, NH 03827
(603) 642-8406

Enfield, NH

Town Manager 2017, 2021
Town Administrator 2005
Police Chief Recruitment 2018
Enfield Board of Selectman
PO Box 373
Enfield, NH 03748
(603) 632-7389

Farmington, NH

Town Administrator 2022
Town Administrator 2012
Board of Selectmen
356 Main Street
Farmington, NH 03835
(603) 755-2208

Gilmanton, NH

Town Administrator 2018
Board of Selectmen
PO Box 550
Gilmanton, NH 03237
(603) 267-6700 x 12

Gorham, NH

Fire Chief Recruitment 2016
Police Lieutenant Recruitment 2018
Robin Frost, Town Manager
20 Park Street
Gorham, NH 03581
(603) 466-3322

Greenland, NH

Town Administrator Recruitment 2018
Vaughan Morgan, Chairperson
Town of Greenland
100 Town Square, PO Box 100
Greenland, NH 03840

Hampstead, NH

DPW Director Recruitment 2023
Sally Theriault, Board of Selectmen
11 Main Street
Hampstead, NH 03841
(603) 329-4100

Hampton, NH

Interim Building Inspector 2019, 2021
DPW Assessment 2011
Jamie Sullivan, Town Manager
100 Winnacunnnet Road
Hampton, NH 03842
(603) 926-6766

Hinsdale, NH

Interim Town Administrator, 2023
Water & Sewer Supt Recruitment 2018
Jill Collins, Town Administrator
Town of Hinsdale
11 Main Street
Hinsdale, NH 03451

Hollis, NH

Building Inspector/Code Officer 2017
DPW Director 2018
Town Administrator 2018
Interim Town Administrator 2018
Board of Selectmen
7 Monument Square
Hollis, NH 03049
(603) 465-3701

Hooksett, NH

Town Administrator 2009, 2019
Police Chief Recruitment 1999
Hooksett Town Council
35 Main Street
Hooksett, NH 03106
(603) 485-8472

Hudson, NH

Town Hall Staffing Study 2022
Finance Director Recruitment 2020
Land Use Director 2017, 2018
Stephen Malizia, Town Adm.
12 School Street
Hudson, NH 03051
(603) 886-6024

Jaffrey, NH

Interim Utility Manager 2020
Public Works Study 2019
Town Manager 2016
Jon Frederick, Town Manager
10 Goodnow Street
Jaffrey, NH 03452
(603) 532-7880

Laconia, NH

City Manager 2011
City Council
45 Beacon Street East
Laconia, NH 03246
(603) 527-1270

Lakes Region Planning Commission

Meredith, NH
Executive Director 2013
Warren Hutchins
103 Main Street, #3
Meredith, NH 03253
(603) 279-8171

Lebanon, NH

Finance Director 2019
DPW Director 2018
City Manager 2017
Shaun Mulholland, City Manager
City of Lebanon
51 North Park Street
Lebanon, NH 03766
(603) 448-1071

Lincoln, NH

Town Manager 2021
Board of Selectmen
Town of Lincoln
PO Box 25
Lincoln, NH 03251

Litchfield, NH

Police Chief Recruitment 2023
F. Robert Leary, Board of Selectmen-Chair
2 Liberty Way, Suite 2
Litchfield, NH 03052
(603) 424-4046

Littleton, NH

Finance Director Recruitment 2020
Staffing Review 2020
James Gleason, Town Manager
Town of Littleton
125 Main Street, Suite 200
Littleton, NH 03561

McGregor Memorial EMS

Executive Director 2018
Matthew Willett, Chair
47 College Avenue
Durham, NH 03824
(603) 312-2052

Meredith, NH

Town Manager 2003
Assessor 2005
Frank Michel, Esquire
66 NH Route 25
Meredith, NH 03253
(603) 279-6100

Merrimack, NH

Public Works Director Recruitment 2022
Paul Micali, Town Manager
6 Baboosic Lake Road
Merrimack, NH 03054
(603) 424-2331



NEW HAMPSHIRE CONTINUED

Milton, NH

Town Administrator 2019
Board of Selectmen
Town of Milton
424 White Mountain Hwy
PO Box 310
Milton, NH 03851

Moultonborough, NH

Town Administrator Recruitment 2015
Carol Granfield, Interim TA
PO Box 139
Moultonborough, NH 03254
(603) 476-2347

NH Community Development

Finance Authority

Executive Director 2004
Michael Long
Former Chairman of the Board
Community Guaranty Saving Bank
Plymouth, NH
(603) 536-0001

New Hampton, NH

Town Administrator Recruitment 2023
Michael A. Drake, Board of Selectmen-Chair
6 Pinnacle Hill Road
New Hampton, NH 03256
(603) 744-3559

Northfield, NH

Town Administrator Recruitment 2019
Board of Selectmen
Town of Northfield
21 Summer Street
Northfield, NH 03276

North Hampton, NH

Police Chief Recruitment 2023
Michael Tully, Town Administrator
237A Atlantic Avenue
North Hampton, NH 03862
(603) 964-1514

Northwood, NH

Town Administrator Recruitment 2023
Hal Kreider, Board of Selectmen-Chair
818 1st New Hampshire turnpike
Northwood, NH 03261
(603) 942-5586

Nottingham, NH

Town Administrator 2022
Donna Danis, Chair
139 Stage Road
Nottingham, NH 03290
(603) 679-5022

Pelham, NH

Town Administrator Recruitment 2014
Library Director Recruit/Interim 2014
Joseph Roark, Town Administrator
6 Village Green
Pelham, NH 03076

Pittsfield, NH

Town Administrator 2007
Board of Selectmen
PO Box 98
Pittsfield, NH 03263
(603) 435-6291

Plaistow, NH

Fire Chief Recruitment 2019
Town Manager 2006
Board of Selectmen
145 Main Street
Plaistow, NH 03865
(603) 382-8469

Portsmouth, NH

Kelly A. Harper, PHR
City of Portsmouth
1 Junkins Avenue
Portsmouth, NH 03801

Raymond, NH

DPW Planning Director Recruitment 2023
Town Manager 2007
Board of Selectmen
4 Epping Street
Raymond, NH 03077
(603) 895-4735

Richmond, NH

Police Chief Recruitment 2018
Board of Selectmen
105 Old Homestead Highway
Richmond, NH 03470
(603) 239-4232

Rochester, NH

Commission of Public Works 2015
Fire Chief Recruitment 2021
Daniel Fitzpatrick
City Manager
31 Wakefield Street
Rochester, NH 03867
(603) 332-1167

Rollinsford, NH

Town Administrator Recruitment 2021
Selectboard
667 Main Street
Rollinsford, NH 03869

Rye, NH

Town Administrator Recruitment 2022
DPW Director Recruitment 2021
Finance Admin. Recruitment 2021
10 Central Road
Rye, NH 03870

Salem, NH

Town Manager 2010
Michael J. Lyons, Chairman
Board of Selectmen
33 Geremonty Drive
Salem, NH 03079
(603) 890-2128

Somersworth, NH

Police Chief Assessment Center 2016
Director Dept. of Public Works 2013
Economic Development Mgr. 2012
Fire Chief Recruitment 2011, 2019
Robert M. Belmore, City Manager
City of Somersworth
One Government Way
Somersworth, New Hampshire 03878
(603) 692-9503

Stoddard, NH

Town Administrator Recruitment 2020
Board of Selectmen
Town of Stoddard
1450 Route 123 North
Stoddard, NH 03464-4153

Stratham, NH

Police Chief Recruitment 2018
Town Administrator 2018
Board of Selectmen
10 Bunker Hill Avenue
Stratham, NH 03885
(603) 772-7391 x187

Thornton, NH

Town Administrator 2022
Town Administrator 2017
John Paul Hilliard, Chairman
Board of Selectmen
16 Merrill Access Road
Thornton, NH 03285
(603) 726-8168

Wilton, NH

Town Administrator 2018
Board of Selectmen
PO Box 83
42 Main Street
Wilton, NH 03086
(603) 654-9451

Wakefield School District, SAU 101

Superintendent Search 2016
Norma Joy, Chairperson
Wakefield School Board
18 Commerce Way
Milton, NH 03851
(603) 534-1864

Warner, NH

Town Administrator 2013
David Karrick, Chairman
Board of Selectmen
PO Box 265
5 East Main St.
Warner, NH 03278
(603) 456-2298

Weare, NH

Police Chief 2019
Board of Selectmen
Town of Weare
15 Flanders Memorial Road
Weare, NH 03281



NEW HAMPSHIRE CONTINUED**Windham, NH**

Town Administrator 2021
Finance Director Recruitment 2015
Brian McCarthy, Town Administrator
3 North Lowell Road
Windham, NH 03087
(603) 432-7732

Wolfeboro, NH

Interim Building Inspector 2020
Finance Director Background 2019
Town Manager 2015, 2017
Fire Chief 2016
David Owen, Town Manager
84 South Main Street
Wolfeboro, NH 03894
(603) 569-8161

MAINE**Berwick, ME**

Town Manager &
Interim Town Manager 2015
Bryan O'Connor, Chairman
Berwick Selectmen
11 Sullivan Street
Berwick, ME 03901
(207) 698-1101

Brunswick, ME

Town Manager 2009
Fran Smith, Town Clerk
28 Federal Street
Brunswick, ME 04011
(207) 725-6659

Kittery, ME

Town Manager Recruitment 2013
George V. Dow, Chairperson
Kittery Town Council
200 Rogers Road Extension
Kittery, ME 03904
(207) 475-1329

Portland, ME

City Manager Recruitment 2015
Gina Tapp, HR Director
City of Portland
389 Congress Street
Portland, ME 04101
(207) 874-8300

Sabattus, ME

Interim Town Manager &
Community Development 2011
Town Manager 2009
Board of Selectmen
Town of Sabattus
190 Middle Road
Sabattus, ME 04280
(207) 375-4331

Somerset County, ME

County Administrator 2013
Earla J. Haggerty
Interim County Administrator
Somerset County
41 Court Street
Skowhegan, ME 04976

VERMONT**Essex & Junction of Essex**

Municipal Manager 2017
Town of Essex and Village of Essex Jct
81 Main Street
Essex Junction, VT 05452

Hartford, Vermont

Town Manager 2018, 2020
171 Bridge Street
White River Junction, VT 05001
(802) 295-9353

Johnson, VT

Town Administrator Recruitment
Duncan Hastings, Town Administrator 2023
293 Lower Main West
Johnson, VT 05656
(844) 287-6709

Johnson, VT – Village of

Village Manager Recruitment 2022
Steven Hatfield, Trustee Chair
293 Lower Main Street West
Johnson, VT
(802) 635-2611

Newport, VT

City Manager Recruitment 2023
Laura Dolgin, City Manager
222 Main Street
Newport, VT 05855
(802) 334-2112

Shelburne, VT

Town Manager 2018
Jerry Storey, Chair of the Selectboard
Town of Shelburne
PO Box 88
5420 Shelburne Road
Shelburne, VT 05482
(207) 474-9861, X-232

Thetford, VT

Town Manager Recruitment 2023
Sharon Harkay, Selectboard-Chair
3910 Route 113
Thetford, VT 05075
(802) 785-2922

Westminster, VT

Town Manager Recruitment 2023
Katrina Hamilton, Selectboard, Chair
3651 U.S. Route 5
Westminster, VT 05158
(802) 722-4255

Williston, VT

Town Manager Recruitment 2020
Town of Williston
7900 Williston Road
Williston, VT 05495



CONNECTICUT

Bloomfield, CT

Town Manager 2021
Mayor Danielle Wong
Town of Bloomfield
800 Bloomfield Avenue
Bloomfield, CT 06002
(860) 769-3500

Cromwell, CT

Town Manager 2013 & 2015
Public Works Director 2014
Enzo Faienza, Mayor
Town of Cromwell
41 West Street
Town Hall, 1st Floor
Cromwell, CT 06416
(860) 632-3410

Killingly, CT

Town Manager 2013
172 Main Street
PO Box 6000
Danielson, CT 06239
(860) 779-5334

Marlborough, CT

Town Manager Recruitment 2023
Amy Traversa, Interim Town Manager
26 North Main Street
Marlborough, CT 06447
(860) 295-6200

Simsbury, CT

Town Manager 2017
Lisa Heavner, First Selectwoman
933 Hopmeadow Street
Simsbury, CT 06070
(860) 658-3230

Tolland, CT

DPW Study 2023
Brian Foley, Town Manager
21 Tolland Green
Tolland, CT 06084
(860) 871-3600

Windsor, CT

Public Works Ops Mgr 2016
Peter Souza, Town Manager
275 Broad Street
Windsor, CT 06095
(860) 285-1800

RHODE ISLAND

East Greenwich, RI

Fire Chief Recruitment 2018
Ms Gayle Corrigan, Town Manager
Town of East Greenwich
125 Main Street
East Greenwich, RI 02818

Middletown, RI

Fire Chief Recruitment 2021
Police Chief 2018
Shawn J. Brown, Town Administrator
Town of Middletown
350 East Main Road
Middletown, RI 02842

Portsmouth, RI

Town Administrator 2011 & 2015
Police Chief 2013
Fire Chief 2012
Richard A. Rainer, Jr.
Town Administrator
2200 East Main Road
Portsmouth, RI 02871
(401) 683-3255

South Kingstown, RI

Town Manager 2021
Town of South Kingstown
Julie A. Mason, Finance Department
180 High Street
Wakefield, RI 02879

Westerly, RI

Town Manager 2015, 2018
45 Broad Street
Town Hall
Westerly, RI 02891
(401) 348-2500



60 Community Drive | Augusta, ME 04330-9486
1-800-452-8786 (in state) | (t) 207-623-8428
(f) 207-624-0118

August 31, 2023

Mr. Martin Puckett
City Manager
City of Presque Isle
12 Second Street
Presque Isle, ME 04769

RE: Executive Search Proposal

Dear Mr. Puckett:

Please accept this letter and attached materials as the Maine Municipal Association's proposal to assist the City of Presque Isle's City Council with their selection of a new City Manager.

The Maine Municipal Association, over the last several years, has assisted dozens of Maine communities with the selection of their City/Town Managers and Administrators. Some of the communities to which we have provided this service recently include: Winthrop, Lisbon, Sebago, Waterboro, Blue Hill, North Yarmouth, and Manchester. We have also assisted several non-municipal organizations in similar searches for an executive director, including Orono-Veazie Water District.

If you have any questions regarding this proposal, please do not hesitate to contact me at (800) 452-8786. We look forward to the opportunity of working with the City of Presque Isle in their search for a new City Manager.

Respectfully submitted,

David Barrett
Director, Personnel Services & Labor Relations

Encls.

MAINE MUNICIPAL ASSOCIATION
PROPOSAL
EXECUTIVE SEARCH/CITY MANAGER
CITY OF PRESQUE ISLE

The Maine Municipal Association (MMA) is pleased to submit the following proposal designed to provide professional assistance to the City of Presque Isle in the search and selection of a new City Manager.

Step One: Needs Assessment

The Director of Personnel Services and Labor Relations (MMA) will meet with the City Council to conduct a needs assessment pertaining to the City government and the City Manager position and report results of this meeting back to the Council in writing. The purpose of this meeting will be to obtain a consensus of the Council's priorities regarding the qualifications, skills, and experience to be looked for in potential candidates. This information is central to the selection process and is used in narrowing down the field of candidates.

This section includes:

- Development of Candidate Profile
- Discussion of Advertising Options
- Discussion of Role, if any, of Non-Council Participants
- Potential Process for General Citizen Input to the Council

Step Two: Recruitment

The Director of Personnel Services and Labor Relations (MMA) will discuss with the City any recruitment activities the City may want to undertake. It is understood that the Maine Municipal Association cannot be held responsible for those activities initiated prior to MMA's involvement.

Step Three: Rating Document

The Director of Personnel Services and Labor Relations (MMA) will develop a rating document for use in the review of resumes based on the City Council's priorities as identified in the needs assessment meeting.

Step Four: Resume Review – MMA

Immediately following the application deadline, the Director of Personnel Services and Labor Relations (MMA) will conduct an initial review of resumes utilizing the rating document. All resumes will be presented for the Council's review. However, the Director of Personnel Services and Labor Relations (MMA) will have identified the strongest resumes based on the Council's priorities. This will allow the City Council to concentrate their efforts on the top group of candidates.

Resumes will initially be screened by The Director of Personnel services and then some portion of the resumes, to be determined in discussions with the Council, will be turned over to the Council or a designated screening panel for further review. The goal here is to identify candidates who will be invited to Presque Isle for a first round interview.

Step Five: Resume Review – City Council

The Director of Personnel Services and Labor Relations (MMA) will be present at the Council's Resume Review Meeting. He will be available to answer questions regarding the Maine Municipal Association's resume review activity and will instruct the Council in the use of the rating document. It is suggested that the Council utilize the rating document in reviewing those individuals identified as strong candidates. The remaining resumes may be reviewed in a more informal manner by members of the Council. A decision will then be made regarding who will be interviewed. The Director of Personnel Services and Labor Relations (MMA) will participate in the discussion of the candidates providing his perspective on how individual candidates appear to match the Council's criteria.

Step Six: Interviews

The Director of Personnel Services and Labor Relations (MMA) will develop an interview structure and rating document for use during the interview sessions. He will also be present during the interviewing of the finalists. His function will be to provide a briefing for the interview panel on the interview structure, to be available for questions regarding the structure, and to assist as a non-voting coordinator. He will again participate in the Council's discussion and deliberation as the Council identifies its finalist for the position of City Manager.

Decisions here involve whether the Council as a body will do the interviews or will an alternative first round interview panel be constructed.

Step Seven: Background Check

After the interviews, the Director of Personnel Services and Labor Relations (MMA) will conduct a telephone checking of references and employment history of the finalist and report findings back to the City Council. The emphasis will be on confirming or denying information already obtained through the selection process. To insure uniformity and control of this extremely sensitive stage of the selection process, the Director of Personnel Services and Labor Relations (MMA) will be the only individual included in this process, or will coordinate the involvement of other individuals.

Step Eight: Second Interview

The Director of Personnel Services and Labor Relations (MMA) will provide guidance regarding the content of the second interview and will advise concerning procedures for the actual hiring decision. Assistance will also be provided concerning press relations, confidentiality, and other details of the selection process.

Again, a discussion will be conducted with the Council to determine participants in the second interview stage. Most likely, at this point, it would be the full Council. If the Council had included community stakeholders and/or other interested parties in the process, their role would have concluded at this stage.

Step Nine: Offer and Negotiations

The Director of Personnel Services and Labor Relations will assist the Council in preparing and delivering an offer of employment to the Council's choice to be the next City Manager of Presque Isle. The Director will serve as a conduit between the candidate and the Council, or its designee, as negotiations take place.

Fee:

The fee for Maine Municipal Association's services for the Executive Search for a City Manager for Presque Isle is sixty-four hundred dollars (\$6,400.00). This fee includes all MMA staff services, mileage, meals, lodging, postage, phone charges, and photocopying. The fee does not include advertising or any candidate expenses that the City might incur. The fee includes all staff time and expenses that are incurred as part of the first complete search process. If the City, after completing all stages of the search elects to re-advertise the position and start over, the City will be billed for the additional staff time and expenses.



August 21, 2023

Jacob Shaw, Chair
Presque Isle City Council
City of Presque Isle
12 Second Street
Presque Isle, Maine 04769

Dear Chair Shaw,

Eaton Peabody Consulting Group, LLC (EPCG) is pleased to submit the following proposal to assist the City of Presque Isle in hiring its new City Manager.

Introduction

Eaton Peabody Consulting Group, located in Augusta Maine, is a multi-disciplined consulting team providing services in the areas of Municipal Management, Business Development, Community Assistance, and Governmental Affairs. EPCG has the expertise to provide direct assistance at the municipal, regional, and state levels throughout Maine, Atlantic Canada, and New England.

Don Gerrish leads EPCG's Municipal Management services team. They have successfully completed over 60 executive searches in the last 13 years. The Municipal Services provided are geared toward assisting communities/associations who are in transition, and our Consultants can provide assistance in:

- Staff replacements, such as municipal manager/director recruitment
- Assisting communities in reorganization efforts
- Ethics Evaluations
- Labor and Contract Negotiations
- Assessing critical financial Issues
- Personnel Evaluations
- Organizational Assessment and Development
- RFQ/RFP Design and Support
- Conflict Resolution
- Board and Council Assistance

EPCG believes that for a successful City Manager search all participants must make a commitment to an agreed upon timeline and process and actively participate. The agreed upon process ensures that everyone is committed to finding the best candidate for the position that

meets the desired qualifications, experience and education and, just as important, is the right fit for the City . We also believe that citizens and staff should be included in the process by inviting them to contribute their ideas on what they feel are important qualities to consider for the next City Manager . This information gathered will be shared with citizens, staff, candidates and the City Council. Our goal is to help develop a successful process with the City Council using our experience and knowledge of the recruitment process, as well as our contacts in the industry, to provide Presque Isle with a high level of satisfaction that an effective process was utilized to find the best candidate for the position.

Approach

Don Gerrish will lead the City Manager search. The search process would include the following:

- Y developing an overall recruitment strategy and process with the City Council;
- Y assisting the City Council in determining the essential skills and experiences required for its next City Manager to assist with the issues and challenges facing Presque Isle;
- Y determining, with the City Council, the process and timeline that will be used in the search and who else, if anyone, will be included in the actual interviews;
- Y developing a format that allows citizens and employees to have input into the personal characteristics, education, traits, and experience that the new City Manager should possess;
- Y preparing a draft employment advertisement for review by the City Council;
- Y determining, with the City Council where and in what media to advertise (i.e. nationally, regionally, locally, internet and/or newspapers);
- Y receiving and reviewing all applications, including performing initial investigation of the applicants, preparing information packets on all applicants, and assisting the City Council regarding suitable applicants to interview;
- Y scheduling all interviews, assisting with suggested questions, and participating in the interviews as an observer;
- Y after the City Council has selected the finalist(s), do complete background checks on the top candidate(s) and scheduling second interviews and providing questions if necessary;
- Y being available to answer any questions and assist the City Council in its evaluations and selection; and
- Y assisting in contract negotiations for the terms of employment with the selected candidate, if requested by the City Council.

Related Experience

Don Gerrish, retired from municipal government in 2008 after a successful 38 year career in managing a number of Maine communities including Gorham and Brunswick, Maine. He has worked for EPCG since October of 2009 heading up their Municipal Management Services Team. He has successfully assisted the Towns/Cities of Wiscasset (2), Greenville, Corinth, Orono, Arundel (2), Bowdoinham, Poland(3), Old Town, Damariscotta (2), Bucksport, Kittery(2), Rockland, Auburn, Freeport, Howland(2), Lisbon, Castine, Bar Harbor, Biddeford, Ellsworth, Hampden (2), Cape Elizabeth, South Portland, Gorham, Ogunquit, Standish, Lincoln , Boothbay Harbor, Thomaston, Windham, Gray, Casco, Farmington, Millinockett, Sabattus, Gardiner,

Vinalhaven, Sagadahoc County, Hancock County, Kennebec County, Wells, New Gloucester, Vinalhaven, Bristol, Winterport, Vassalboro, Waterville and Limestone with their Manager searches. He also assisted the Town of Kittery with their Police Chief search. While assisting Wiscasset, Bowdoinham, Poland, Damariscotta, Auburn, South Portland, Ogunquit, Windham and Casco he was also their interim Town/City Manager. He served as Interim General Manager of Portland Metro and assisted in their General Manager search. Mr. Gerrish has also done a number of workshops for the City Councils of Bangor, Lisbon, and Gray on Manager and Council relations. Please feel free to contact any of these communities for a reference.

Mr. Gerrish also successfully completed the search for a new Executive Director for the Maine Municipal Bond Bank and Maine Health and Higher Education Facilities Authority, General Manager of the Greater Portland Transit District (METRO), Finance Director for the City of Portland, Executive Director of the Greater Portland Council of Governments, Executive Director of the Presque Isle Industrial Council, General Manager of the Kennebunk Light and Power District.

A copy of Don Gerrish's resume is attached.

Rates and Fees

EPCG professional services will be provided for a fee of \$7500, plus reimbursement of direct expenses such as mileage, printing, advertising expenses, and other reasonable expenses incurred. This particularly relates to any expenses related to attracting the candidates. Any and all candidate expenses agreed to by the City are the sole responsibility of the City of Presque Isle.

It is estimated that the process will take 2-3 months to have a new City Manager named. A draft timeline for the search is attached for information purposes. The starting date will depend on the employment of the selected candidate, but it is not uncommon for the candidate to need 30-45 days before starting. The exact process and timetable for the search will be developed with the City Council.

We are excited about the prospect of again working with the City of Presque Isle and welcome the opportunity to meet with the City Council to discuss this proposal. Please contact me with any questions you may have. I may be reached at 207-751-6828 or via email at dgerrish@eatonpeabody.com,

Thank you for the opportunity to submit this proposal.

Sincerely,

Don

Don Gerrish
Municipal Consultant
EPCG

State of Maine Manager/Executive Searches

- Arundel (2)
 - Auburn
 - Bar Harbor(2)
 - Biddeford
 - Boothbay Harbor
 - Bowdoinham
 - Bristol
 - Bucksport
 - Cape Elizabeth
 - Casco
 - Castine
 - Corinth
 - Damariscotta (2)
 - Ellsworth (2)
 - Farmington
 - Freeport
 - Gardiner
 - Gorham
 - Greenville
 - Hancock County
 - Hampden (2)
 - Howland (2)
 - Kennebeck County
 - Limestone
 - Kittery (2)
 - Lincoln
 - Lisbon
 - Millinocket
 - New Gloucester
 - Old Town
 - Ogunquit
 - Orono
 - Portland (Finance Director)
 - Poland (3)
 - Rockland
 - Sagadahoc County
 - Sabattus
 - Standish
 - South Portland
 - Thomaston
 - Vassalboro
 - Vinalhaven
 - Waterville
 - Wells
 - Wiscasset (2)
 - Windham
 - Winterport
 - York
-
- Greater Portland Council of Governments (Executive Director)
 - Greater Portland Transit District (METRO) (General Manager)
 - Maine Municipal Bond Bank & Maine Health & Higher Education Facilities Authority (Executive Director)
 - Presque Isle Industrial Council (Executive Director)
 - Kennebunk Light and Power District (General Manager)



Eaton Peabody Consulting Group

Donald H. Gerrish, Municipal Services Consultant

Don has been involved in all aspects of Town and City Management in the State of Maine for over 37 years. He retired from the Town of Brunswick after serving as its Manager for nearly 20 years. Prior to that, Don managed the Town of Gorham for 10 years, and worked in Auburn and Rockland as well. In 1993 he was elected by his peers from all over the world to serve on the Board of the International City/County Managers Association as a Regional Vice-President, and was then chosen by the membership in 1996 to serve as the Association's President. This allowed him to travel throughout the United States and Europe meeting managers and discussing issues they and their communities were facing. Don has extensive experience in all facets of Municipal Government including:

- Council/Selectmen/Manager Relations
- Ethics for Staff and Elected Officials
- Manager Evaluations
- Town/School Relations
- Goal Setting for Elected Officials
- Municipal Budgeting
- Personnel Issues
- Union Negotiations
- Federal Relations
- University/College/Town Relations
- City/Town Manager Recruitment

EDUCATION

University of Maine, BS

MEMBERSHIPS AND AFFILIATIONS

International City Managers Association 1974 to present

President 1996-1997; Northeast Regional Vice President 1993-1995

Maine Town and City Managers Association 1974 – present

President 1983-1984; Manager of the Year 1987

Maine Municipal Employees Health Trust 1981 - present *Chairman 1981-1987; 1999-2002*

Maine Health Care Performance Council 2002 *Co-Chairman appointed by Gov. King*

Cumberland County Strategic Planning Committee 2001 *Chairman*

Trustee, Cumberland County Civic Center 1985-1991 *Chairman 1987-1988*

Member, Waste Management Advisory Council 1991-1992 *Appointed by Gov. McKernan*

Board of Directors, Greater Portland United Way 1989

Member of Portland Area Comprehensive Transportation Study 1980-1989 *Chairman*
1985-1986

Member, of Governor's Municipal Advisory Committee 1983-1984

Maine Municipal Association Executive Committee 1982-1983

Member, MidCoast Council of Business Development and Planning



EXECUTIVE SEARCH | *CITY MANAGER*

Proposed Scope of Work, Methodology, Work History, Qualifications & Recruitment Schedule

Submitted: 5 September 2023



Prepared for:

City of Presque Isle

City Hall, 12 Second Street

Presque Isle, Maine 04769

Attn: Jacob Shaw, Council Chairman

Prepared by:

Municipal Solutions LLC

Local Government Services

875 S. Estrella Parkway # 5038

Goodyear (Phoenix), AZ, 85338

Phone: (888) 545-7333

David A. Evertsen, CEO & Principal



Prepared for:

City of Presque Isle
City Hall, 12 Second Street
Presque Isle, Maine 04769
Attn: Jacob Shaw, Council Chairman

Prepared by:

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875 S. Estrella Parkway # 5038
Goodyear (Phoenix), AZ, 85338
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(888) 545-7333

5 September 2023



City of Presque Isle
 City Hall, 12 Second Street
 Presque Isle, Maine 04769
 Attn: Jacob Shaw, Council Chairman

RE: SEARCH for CITY MANAGER

Chairman Shaw, Deputy Chairman Freeman, Councilors Chasse, Cyr, Green, Nelson and Willette -

You have an amazing opportunity before you!!!! We appreciate how significant the opportunity to recruit a new City Manager is for the next phase of the City of Presque Isle's future. Local governments of *today* and *tomorrow* **require professionals who understand 'public service in the current context', who can** attract, retain & develop a diverse workforce while creating a highly-motivated public employees making local government more efficient, effective and sustainable.

As experienced Executive Recruiters & HR Experts, we know how challenging it can be for cities and counties to attract and retain public employees. Thankfully, our Executive Search Team is highly respected because our team includes practitioners who have developed an effective and proven process to complete more than 400 successful local government searches and interim placements:

What makes us different:

- ✓ we consider the uniqueness of your local government – particularly the uniqueness of a small community,
- ✓ we contact regional administrators not actively looking for employment and personally invite them to apply,
- ✓ we use a Hybrid 3-part Recruiting Process including personal (person-to-person contact), digital (social media), and relational (national network of 20,000 public administrators, to attract candidates,
- ✓ we use SmartCheck® – our own 4-level background investigation process of social media / news archives, references, employment / education verification, and criminal / civil / financial records,
- ✓ 360° Interview Process of stakeholders, and Assessment Centers / Team-Building at 3 or 6 months, and
- ✓ we will attract incredible women, men and minorities who are **a 'best fit' for** and committed to your community.

Our proposal includes a *significantly-reduced pricing for multiple searches if needed within 1 year**:

Cost per search		
City Manager recruitment	future recruitment (if needed)	future recruitment (if needed)
\$22,400	\$20,400*	\$18,400*
	-\$2,000	-\$4,000

A few of our Executive Searches, Interim placements and Human Resource-related assignments we have completed for clients in New England include:

- *Virginia: Colonial Heights, Danville, Loudoun County, Prince William County, Roanoke, Winchester, York;*
- Maryland: Baltimore, Brunswick, Cheverly, Glenarden, La Plata, MD Parks & Planning Commission.;*
- Massachusetts: Dartmouth, Winchendon; New Hampshire: Hanover; Pennsylvania: Norristown (x3).*

Our national & state-by-state search experience uniquely qualifies us for this assignment:

- *Arizona, Alabama, Alaska, California, Florida, Georgia, Illinois, Iowa, Kansas, Kentucky, Maine, Maryland, Massachusetts, Michigan, Mississippi, Minnesota, Montana, New Hampshire, New Jersey, New Mexico, New York, North Carolina, Oklahoma, Ohio, Oregon, Pennsylvania, Rhode Island, Texas, Virginia, Washington, Washington D.C., and more!*

A few of our past & current clients nationwide include:

- *Alaska: Matanuska-Susitna Borough, North Pole, Sitka, Valdez;*
- *Arizona: Anthem, Avondale, Buckeye, Chandler, El Mirage (x4), Flagstaff, Fountain Hills, Glendale, Goodyear, Guadalupe, Kingman, Mesa, Maricopa, Payson, Phoenix, Queen Creek, Safford, Scottsdale, Tusayan, Yuma;*
- *Iowa: Ankeny, Indianola, Polk County, Windsor Heights;*
- *Kansas: Arkansas City, Salina*
- *New Mexico: Alamogordo, Farmington, Gallup, Sunland Park;*
- *Nevada: Elco, Mesquite, North Las Vegas;*
- *North Carolina: Fayetteville Greenville Utilities Commission, Greensboro, Union County;*
- *Florida: Bel Harbour, Broward County, Cape Coral, Clay County, Coconut Creek, Collier County, Daytona Beach, Delray Beach, Fort Lauderdale, Hernando County, Indian River Shores, Jupiter Island, Key West, Largo, Marco Island, Martin County, Melbourne, Miami, Miramar, New Smyrna Beach (2x), Oskaloosa, Parkland, St. Cloud, Tequesta, Wellington, West Palm Beach;*
- *Ohio: Beachwood, Cuyahoga County, Dublin;*
- *Texas: Bellville Corpus Christi, Port Arthur (3x), Odessa (x3),;*
- *Utah: Centerville, Clearfield, Cottonwood Heights, Draper, Eagle Mountain, Fruit Heights, Harrisville, Hurricane, Kaysville, Layton, Lindon, North Ogden, Pleasant Grove, Pleasant View, Provo, Syracuse, Washington Terrace, and West Jordan;*
- *Washington: Fife, Oak Harbor, Sunnyside, Surprise; and Tacoma; (complete list below).*

We are your **'safe pair of hands'**

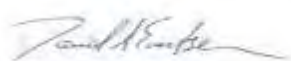
The following materials include details of our Methodology, Qualifications, and proposed Scope of Work for our Executive Search services. We have included:

- a Statement of Qualifications including references and list of clients,
- a *customized* Recruitment Schedule – which can be amended to your liking,
- a sample of one of our 10-page color Recruitment Profiles (customized per client), and
- a sample of our comprehensive Finalist Candidate Background Investigations Report.

Please contact me personally at (928) 220-2611 if you have any questions or suggested alterations.

We look forward to working with you!!!

Thank you kindly,



David Evertsen, CEO & Principal
Municipal Solutions, LLC

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Section 1 - Executive Summary

Below is a *brief* description of the scope of work detailed in this proposal that Municipal Solutions, LLC will deliver including the costs and timeline for expected delivery. It is recommended that the proposal is read and considered in its entirety.

Objectives

This project will be the mechanism for attracting, evaluating, screening, recommending, interviewing and on-boarding high-quality candidates through a well-established, successful Executive Search process. We understand that our work will shape the efficient management, culture and effectiveness of municipal operations for years to come!

Municipal Solutions LLC will conduct a dynamic national recruitment, review all candidate credentials, examine their work experience, explore their media and social media history, interview a wide-variety of professional references, conduct comprehensive civil and criminal background checks, sharing these findings with Recruitment Team and proposing candidates who will likely provide the Organization, staff and community with the best possible leadership potential.

Details are provided in the pages following this section.

Goals of this Project

- ✓ Attract, Recruit and Retain a high-quality pool of candidates for consideration by the City Council to serve as *City Manager*.

To accomplish this primary goal, we will perform the following services:

- ✓ Interviews w/ the Mayor, City Council and/or Department Heads (as appropriate) to understand organization successes, challenges and expectations for the *City Manager*.
- ✓ Prepare, and publish a 10-page color Recruitment Profiles to provide a comprehensive view of the City, various organizations, accomplishments, challenges and opportunities to be expected.
- ✓ Conduct a 3-Part Dynamic Recruitment using our national professional network & electronic media.
- ✓ Complete SmartCheck® a 4-Level Digital and Manual Background Screening Process examining (1) Pre-screening, (2) internet & social media & news archives, (4) reference interviews, and (5) Comprehensive Background (Education and Employment verification, Civil, Criminal and Financial Investigations).
- ✓ Assist in Finalist Selection and Interview Support.
- ✓ Candidate transition, on-boarding, and continued assistance.

Activity 1: Stakeholder Interviews

- ✓ Interviews with the Mayor, Councilmembers and / or Department Heads as appropriate to:
 - *Develop a profile of the 'ideal candidate'.*
 - *Learn the issues new employee will face.*
 - *Discuss organizational successes and challenges likely to be faced.*
 - *Gather materials for our information and to send to potential candidates.*
 - *Discuss compensation package the agency is prepared to offer the City Manager.*
 - *Finalize the recruitment schedule.*

Activity 2: Job Profile: 3-Part Dynamic Recruitment

- ✓ Design and publish a 10-page color Recruitment Profile used to recruit candidates nationally (see attached samples).
- ✓ 3-Part Dynamic Recruitment
 1. Active Pursuit. Identify and pursue regional candidates who are qualified for each position (particularly those not actively seeking a new job) and encouraging them to apply.
 2. Professional Network. E-mail the advertisement to our professional network of 20,000 public administrators and encourage them to apply and / or share the opportunity.
 3. Digital Media. Distribute the profiles and recruitment materials through local, regional and national sources including industry associations, publications & websites.

Activity 3: 4-Level background Screening Process

Candidate Reports (see sample attached) will be provided to the City Council and will include all updated information – including background investigations – as they are completed at each stage. These reports will aid the City Council in discussing and deciding on the progression of candidates up to the Finalist interviews.

Level 1 - Candidate Pre-screening. Consultants will carefully review each resume and cover letter, putting all relevant detail into a Qualifications Table for easy reference to screen-out all non-qualified candidates and create a narrower list of 12-15 *first-round* candidates (exact number TBD). *Top candidates will be asked to complete a writing sample and will participate in a 15-minute video interview.*

Level 2 – Internet, Social Media & News Archives. Once a first-round of 12-15 potential candidates have been identified, consultants conduct a comprehensive internet search of Social Media (*Facebook, Twitter, Google Plus, Instagram, LinkedIn & News Archives*) for information regarding each candidate.

Level 3 - Reference Interviews & Writing Samples. We will ask 6-8 *second round* candidates to provide a list / variety of references including elected officials, media, subordinates, and co-workers who will be interviewed by our consultants. Our reference checks might include elected officials, the board attorney, the external auditor, representatives of the local press, community leaders, peers, and subordinate employees – some selected by the candidate, and others we select independently. We prefer a minimum of 6, preferably 8 to 10 interviews per candidate.

We will also provide a 6-page questionnaire for candidates to respond to – *a writing sample*. The expectation is to arrive at 4-6 Finalist Candidates.

Level 4 – Comprehensive Background Checks. Once 4-6 Finalist Candidates are selected, our Consultants examine Employment History, Education Verification, Criminal-Civil-DMV-Credit checks.

Activity 4: Finalist Selection & Interview Support

Interview Preparation. Consultants will assist the City Council in the preparation and coordination of interviews – including preparation of the interview *schedule* and 360° interview *process* which may include one of more of the following:

- ✓ *A Social Event with the candidates,*
- ✓ *Technical & Administrative interview panels,*
- ✓ *Group meetings with City Department staff,*
- ✓ *Meet-and-greet with all employees*
- ✓ *Tour of the City,*
- ✓ *Executive Panel Interview (final).*

Activity 5: Transition Assistance & Warranty

Consultants will serve as a resource in the effective transition of the candidate into employment with the Village. This important step includes negotiating the compensation package (if desired) assuring continuity and cohesiveness with a Team-building Workshop at 6 months, and assistance in the **employee's** Evaluation at 6 and 12 months – if requested for no additional cost.

Other team-building / leadership training and Meyers Briggs / Color Code personality testing and training is also available under separate agreement. The warranty will extend for 2 years and is explained below.

Completion & Deliverables Timeline

Our standard recruitment process requires 90-days to assure a high-quality result which produces a candidate who has a compelling reason to be in your community, and who is committed to building a future with you. Below is a standard timeline – customized to your recruitment.



Cost Proposal

Municipal Solutions provides a highly-discounted rate for multiple recruitments. Our standard (*negotiable*) price range of \$22,400 for a single search, is significantly reduced to \$20,400* and \$18,400* for a second and third search - if additional searches are requested during or within 1 year. See below.

Phase	Cost per search*		
	1 st recruitment	2 nd recruitment	3 rd recruitment
I. Needs Analysis & Interviews	\$4,900	\$2,900	\$2,900
II. Advertisement & Recruitment	\$5,200	\$5,200	\$4,200
III. Candidate Screening & Selection	\$5,200	\$5,200	\$4,200
IV: Coordination of Interviews & Selection	\$4,200	\$4,200	\$4,200
V: Contract Negotiation, Warranty, 6-mo Workshop	\$2,900	\$2,900	\$2,900
Total	\$22,400	\$20,400*	\$18,400*
		-\$ 2,000	-\$ 4,000

* if we modify the initial base recruitment profile.

Costs include all advertising, all travel expenses, and preliminary background checks. Expenses and fees associated with *Comprehensive* Finalist Background Checks and candidate travel for interviews are invoiced separately @ \$400 per background check.

Payment will be rendered as follows:

- Payment of Phase I up-front for mobilization and travel costs,
- Progress payments at the end of each Phase II – V as indicated above,
- Separate invoice for criminal / civil background checks and employment / education verification.

Warranty

Municipal Solutions offers one of the best warranties in the Executive Search Industry. If all Phases are followed, we honor our 2-year Warranty and will re-do the search should the candidate leave before two (2) years (details below). Provided we conduct the full search and assuming that your agency selects from the candidates we recommend, we warrant the following:

- 1) We will not approach the selected candidate concerning any other position as long as the individual is employed by your agency.
- 2) If the selected individual leaves for any reason other than an act of God (*for example, total incapacitation or death*) within the *first* year, we will repeat the search at no charge. If he/she departs during the *second* year for any reason other than an act of God, we will repeat the search for the reimbursement of our expenses only.
- 3) If you are not satisfied with any of the candidates we present, we 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.

Section 2 - Executive Search Methodology

The following methodology has been refined over the past 20 years and now is virtually foolproof. We will modify it to integrate your ideas into the process. Our goal is to ensure you have the right people to interview as well as the information you need to make the right decision. Below is our 90-day recruitment process.

Activity 1 – Interviews with Mayor, Selectmen, Department Heads & Employees

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.

The principal objective of these interviews is to determine the needs of the client and the characteristics and attributes of the *ideal* candidate.

Client / Consultant Conference; Community

As the position is an Executive position, our consultants will benefit from personal interviews with the Mayor, Councilmembers, Department Heads and staff (as appropriate) to better understand the nature of the position, its duties and responsibilities and what characteristics, skills and attributes will be important for this position, past successes and the challenges / opportunities your new *employee* will face, and how he / she will be judged and how performance will be evaluated. Determining the *characteristics of the ideal candidate* – such as experience, longevity, education, personality, demeanor, management style, and achievements as well as other items considered important. Our process includes:

- **Compile background information from the jurisdiction's website and other sources,**
- Interview members of the Senior Management Team,
- Discuss and determine:
 - the characteristics of the ideal candidate (*experience, longevity, education, personality, demeanor, management style, achievements, etc.*),
 - evaluation and performance criteria,
 - a competitive compensation package,
 - the recruitment timeline including interview dates,
 - selection criteria and evaluation formats.

This can be accomplished through individual or group interviews.

If the job description needs to be updated, or is compensation has not been set or updated, this is a good time to make sure to remove any final obstacles which might be an obstacle to attracting the right candidates.

Activity 1 - Needs Assessment Interviews

Client & Consultant Conference; Committee Characteristics & Timeline

Activity 2 – Job Profile & Recruitment

Position Profile / Recruiting Materials
3-part *Dynamic* Recruiting

Activity 3 – 4-level Screening Process

Level 4 Background Check
Consultant Reports

Activity 4 – Selection & Interviews

Finalist Selection & Notification
Candidate Assessment / Interview Process
Debriefing and Selection

Activity 5 – Transition Assistance

On-Boarding & Additional Services



City Manager

If necessary, our consultants will review these materials and recommend changes.

The other objective of this conference is to finalize the recruitment timeline so candidates can mark their calendars well in advance and will be available when the elected officials wish to conduct the interviews. Consultant and client will work together to establish a solid recruitment timeline.

Activity 2 – Job Profile & 3-part *Dynamic* Recruiting

Position Profile / Recruiting Materials

Consultants will develop a high-quality, relevant, color position description is probably the single-most constituting factor to recruitment success. Because we want to attract highly-qualified candidates from an existing position as well as in-transition professionals, the profile must speak to them.

Consultants will combine the information obtained in the initial Client / Consultant Conference with the background information from the **jurisdiction's website and other sources to create a profile which includes:** *Community Background, Form of Government, Longevity of Department Heads and Elected Officials, Accomplishments, Challenges / Opportunities and Amenities and Qualifications*

In summary, consultants will:

- ✓ *Develop a draft comprehensive, full-color Recruitment Profile,*
- ✓ *Provide the draft for your review and comment,*
- ✓ *Incorporate your recommended suggestions into the final document; and*
- ✓ *Prepare for national distribution. [See Appendix for more samples.](#)*

Dynamic Recruiting

Dynamic Recruiting involves three (3) elements:

1. **Active Pursuit.** The best approach is diligent, personal outreach. Consultants will begin searching for and identifying potential candidates locally and regionally who appear qualified for the position (particularly those not actively seeking a new job), and encouraging them to apply.
2. **Professional Networking.** Consultants will E-mail the advertisement to our professional network of 20,000 public administrators and encourage them to apply and / or share the opportunity.
3. **Digital Media.** Consultants will distribute the advertisement and recruitment materials through local, regional, state and national sources including industry publications & partner websites to reach more than 40,000 views. We will also use our social media tools including LinkedIn and Facebook to reach more than 5,000 direct connections.



Activity 3 – 4-level Background Screening Process

Level 1 – Initial Candidate Pre-screening

Consultants will carefully review each resume and cover letter, putting all relevant detail into a table for easy reference. The Qualifications Table allows for our consultants to maintain a single-**reference of all candidates' qualifications, education and experience and maintains accurate** recordkeeping of the evaluation process.

Teleconference Interview (phone or video). Our recruitment team will personally interview each of these candidates using Zoom or GoToMeeting or by telephone. Using what we learned in Phase I of the project 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.

Once we have evaluated the information we have gathered, we will present the strongest candidates to the Agency for its consideration. It should be noted that selecting strong candidates is both an *art* and *science*. While we believe (1) *qualifications* are important for consideration, so is (2) organizational / community *fit* and (3) compelling reasons to commit to your agency.



Candidates Report #1. This report will contain the list of top candidates with copies of their resumes, cover letters and our recommendations for Level 2 consideration. A Client-Consultant video conference concludes with agreement on 10-12 candidates to proceed for further investigation.

Level 2 - Internet, Social Media and Newspaper Archives

We require all candidates to sign an Acknowledgement and Release Form granting us permission to begin the background investigation.

Virtually every local newspaper and has an electronic archive that provides stories about perspective candidates, the issues they have dealt with, how **they resolved them and the results**. While these articles don't always tell the 'whole story', these articles can also provide valuable insights into the **candidate's relationship with the public and the elected officials**. Of course, not all news sources are unbiased and we consider that in our evaluation.



Once a first-round of 12-15 potential candidates have been identified, consultants conduct a comprehensive internet search of social media (*Facebook, Twitter, Google Plus, Instagram, LinkedIn and News Archives*) for any information regarding each candidate.

Candidates Report #2. This *updated* report will be provided to the City Council for each of the selected candidates, with the results of the Level 2 background work. A Client-Consultant video conference concludes with agreement on 10-12 candidates to proceed for continued investigation.

Level 3 - Reference Interviews & Writing Samples.

Reference Interviews. We will ask each of the 6-8 *second round* candidates to provide a list / variety of references including current and former elected officials, media, subordinates, and co-workers who will be interviewed by our consultants. References might also include 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 tell the candidate with whom we wish to speak. We also attempt to contact some individuals who are not **on the candidate's list**. We prefer a minimum of 6, preferably 8 to 10 interviews per candidate. The expectation is to arrive at 4-6 *Finalist Candidates*

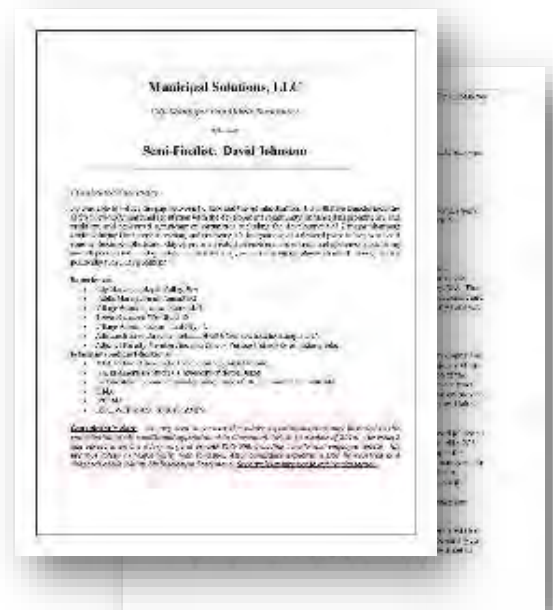
Written Introduction / Writing Sample. We will ask each of the 6-8 *second round* candidates to complete a 6-page, pre-formed written introduction describing who they are and their background / experience. This also allows the recruitment team to further evaluate their writing capabilities, their ability to use technology, and commitment to the process.

Candidates Report #3. This *updated* report will be provided to the City Council for each of the selected candidates, with the results of the Level 3 background work. A Client-Consultant video conference concludes with agreement on 4-6 candidates to proceed for Final Background investigations.

Level 4 – Comprehensive Background Checks

Once 4-6 Finalist Candidates are selected, our Consultants examine Employment History, Education Verification, Criminal-Civil-DMV-Credit checks. Through our third-party vendor, American DataBank®, we will conduct Federal Criminal & Civil, State & County Criminal & Civil, and Financial including bankruptcy and credit (*prospective Finalists only*). Consultants will also use DegreeVerify® for education verification and contact employers to verify employment history.

If we conclude the situation is damaging or even questionable, the candidate should be dropped from further consideration.



Candidates FINAL Report #4. This *final* report is the completed, comprehensive written report for *each* candidate provided to the City Council prior to a Client-Consultant video conference concluding with agreement of 3-4 Finalists for interview.

Activity 4 – Finalist Selection and Candidate Interviews

- Interview Preparation. Consultants will assist in the preparation and coordination of the interview schedule, process and structure. Consultants will work with the City Council to develop a process that *fully* assess the candidates.
- 360° Interview Process. While the particulars may be worked out later, we recommend a process including:
 - Public Reception for the Candidates to interact,
 - Panel Interviews with Technical & Administrative experts
 - Formal Interview with the Board of Selectmen,
 - Public Speaking Presentation on a recent staff report,
 - Assessment Centers.
- Interview Questions. Consultants may also offer advice on interviewing, standardized panel questions and logistical support during their interviews. Consultants are to provide support, not influence the process.
- Decision-Making. Once the interviews are completed, we will provide any additional information the Agency needs in making the final determination.



Activity 5 - Transition Assistance & Warranty

To assure an effective transition of the candidate into employment with the Town, Consultants will serve as a resource in the contract negotiation process **to assure an 'obstacle-free' start for your new hire.**

Warranty. Our work is not done when the contract is executed. We stay in touch with you and your new *City Manager*. Our goal is to assist in mitigating any issues that may become intractable. Approximately six (6) months after hire, we will conduct a Team-building Workshop at no charge, and assist in the *employees* Evaluation at 6 and 12 months – at no additional cost. We simply feel it is part of our job to assure a successful relationship. Our 2-year Warranty is explained in detail at the end of this proposal.



These important steps assure continuity and cohesiveness and long-term success.



Section 3 – Profile of the Firm

Our team is one of the most successful and reliable local government consultancies in the United States. We use simple, straightforward and foolproof processes which have successfully improved 100s of cities throughout the United States.

Company Origins



Municipal Solutions LLC was founded in Phoenix, Arizona on 23 July 2003 to provide a modern, practical and affordable alternative to typical consulting options. Our initial focus was on small, local governments, but when the demand for our services grew, we became a **'collaborative consultancy'** of innovative practitioners (Borough Managers, Finance & Public Works Directors, Police & Fire Chiefs) who really understands the unique needs of local government – with incredible mastery of best practices. Over 18 years, Municipal Solutions has become a multi-disciplinary, *international* public-sector management consulting firm which specializes in Efficiency, Technology and Safety. This three-pronged focus allows our team of 160 Senior Associates and Senior Analysts to provide a variety of services illustrated below.

Efficiency	Technology	Safety
ACCOUNTING & FINANCE Efficiency & Operations Audits Capital Improvement Programs Franchise Review / Revenue Recovery Software Audits & Conversion Process	BROADBAND Cable TV Franchises Broadband Feasibility Studies Wireless Tower Agreements Communications Master Plans	EMERGENCY / RISK MANAGEMENT Communications Interoperability Emergency Operations Plans Hazards & Risks Assessments Training & Emergency Exercises
HUMAN RESOURCES Class & Compensation Studies Interim Staffing & Executive Search Operations Audits / Efficiency Studies Training: <i>Customer Service & Leadership</i> Job Descrip's , Policies & Procedures Manuals	ECONOMIC DEVELOPMENT Strategic Planning Statistical Surveys Stakeholder Summits Energy Sustainability Infrastructure Assessments	PLANNING & ENGINEERING Transit Studies Strategic Planning General Plan Amendments Capital Projects Management (CIPs) Development & Fiscal Impact Analysis

Corporate Structure

Our **'collaborative consultancy'** model provides you with a unique combination of talents, insights and technical skills regarding best practices on a local and national perspective. Our origins in Arizona expanded to 42 states and then to 13 countries – thanks the help of 160 public sector-practitioners provided real-world solutions to public management problems.



Our consultants have served more than 400 local governments in the United States and 40 countries – altogether, our consultants and have provided solutions to 1,000s of local government officials all over the world including Afghanistan, Bangladesh, Bosnia, Egypt, Indonesia, Iraq, Italy, Jordan, Kenya, Libya, Myanmar (Burma), Sri Lanka, Turks & Caicos, Trinidad & Tobago, and the United Kingdom to name a few.

David Evertsen, CEO & Principal personally oversees all consulting projects which are managed by teams of Senior Associates and Senior Analysts hand-picked and assigned on a 'best fit' basis for each project. Because of our three areas of expertise – we are able to provide a unique approach to problems facing local governments. The standard 'consulting as usual' model is dead.

Since 2003, our Local Government Consulting division has helped more than 500 local governments, provincial governments and national government agencies save more than \$351,109,000 through comprehensive organizational assessments, careful analysis, prudent recommendations and effective implementation. Through our efforts, nearly 400 local and national government clients have realized greater revenue collections, reduced fraud and improved public access to public services.

Work Samples / Additional Services

While we follow a standard format and process, each client project is unique. Rather than provide a full copy of a Management Plan in this proposal, we have provided the links below to few samples of studies and reports to allow you to better examine our expertise. All services are available at your request

EFFICIENCY STUDIES & OPERATIONS AUDITS - AK, AZ, CA, CO, FL, KS, KY, NV, MA, MI, OH

All Departments / Full Service

City of Sitka (AK) – [Admin., Electric, Finance, Fleet, Marinas, Public Safety, Utilities](#)
City of Syracuse (UT) – [Admin., Council, Finance, Fleet, IT, Police, Solid Waste, Utilities](#)
City of Bellville (TX) – [Admin., Community Development, IT, Library, Public Works](#)
City of Dartmouth (MA) – [HR, IT, Building / Planning / Zoning, Facilities Mgmt.](#)

Fleet & Facilities

City of Fort Collins (CO) – [Facilities, Custodial, Operations & Maintenance](#)
City of Clearfield (UT) – [Fleet Maintenance](#)

Finance & IT

City of Daytona Beach – [IT & Finance](#)
City of Delray Beach (FL) – [Fire, Fleet, IT, Police, Risk Management, Planning](#)

Public Safety & Public Transit

City of Arkansas City (KS) – [EMS, Police Fire, Finance, Fire, Fleet, IT, Police](#)
City of Coconut Creek (FL) – [Public Transit System Audit & Strategic Plan](#)
Fort Mojave Indian Tribe (AZ, CA, NV) – [Police Department Operations Audit](#)
Other: Parkland, FL; Beachwood, OH; Covington, KY; Missouri Dept. of Public Safety

COMPENSATION & CLASSIFICATION STUDIES - AK, CA, FL, KS, MD, MI, NM, OK, SD

Small Communities

City of North Pole (AK) – [Total Compensation, Admin., Police, Fire, Public Works](#)
Town of Indian River Shores (FL) – [Triple-Certified Public Safety Compensation Study](#)
City of Huron (SD) – [Full Classification Audit & Compensation Study](#)
City of Tecumseh (OK) – [Classifications, Compensation, Benefits Audit](#)

Mid-sized City

City of Gallup (NM) – [Admin., Finance, Fire, IT, Library, Parks, Police, Public Works](#)
City of Walker (MI) – [Triple-Certified Public Safety Department](#)

Large City

City of Shawnee (OK) – [Admin., Finance, Parks, Public Safety, Public Works \(all tables\)](#)

Other: Flagstaff, Fountain Hills, Guadalupe, Queen Creek & Scottsdale, AZ; Jupiter Island, Tequesta, FL; La Habra Heights, CA; Largo, Parkland, Tequesta, FL; Elko, NV; Dublin, OH; Huron, SD; Harrisville, Pleasant View, Pleasant Grove, UT; Colonial Heights, VA;



BROADBAND, FIBER & WIRELESS - AZ, CA, CO, GA, IL, MT, NV, TX, UT, VA, VT, WA, WY

Infrastructure Assessments, Policy & Municipal Broadband Strategy

City of Flagstaff (AZ) - [Infrastructure Assessment, Broadband Policy & Strategic Plan](#)

City of Goodyear (AZ) - [Fiber & Wireless Assessment, Broadband Summit, Strategic Plan](#)

City of Safford (AZ) - [Broadband Infrastructure Assessment, Survey & Strategic Plan](#)

Cable TV Franchise Audits, Negotiation & Wireless Tower Agreements

City of Kingman (AZ) - [Cable TV Franchise Audit / Inspection Report](#)

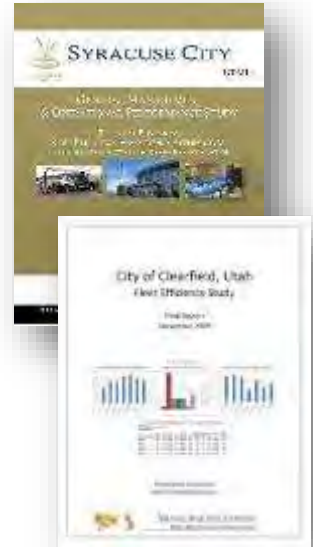
City of Maricopa (AZ) - [Verizon Cell Tower Proposal Assessment](#)

City of Seabrook (TX) - [Review & Recommendations of Cable Franchise Agreement](#)

Other: Cave Creek, Flagstaff, Florence, Superior, Gila & Pinal Counties, Safford, San Carlos Apache Telecom, Wickenburg, AZ; Bountiful, Centerville, Draper, Hurricane, Logan, Payson, N. Salt Lake, UT; La Habra Hts, CA; Upper Dublin Township, PA; Burlington, VT.

Network Design & Construction

Inglewood, Loma Linda, CA; Longmont, CO; Columbia Co., GA; Lewistown, MT; Mesquite, NV; Hurricane UT; Westford, Underhill, Jericho, VT; Kent, WA, Powell, WY; State of Arizona, State of Illinois



CUSTOMER SERVICE & STRATEGIC PLANNING - AK, AZ, CA, CO, ID, KS, NM, NC, PA, RI, SD, TX, UT, WA, WY

City of Arkansas City (KS) - [Citizen Customer Service Survey](#)

City of Avondale (AZ) - [Leadership Summit & 20-year Strategic Plan](#)

Customer Service Training Program Guide & Client List

Sample News Media

We are accustomed to working in an environment where corresponding to and working with the media is essential. Below are links to some of our new articles.



Compensation Studies

[Buckeye, Tolleson City Managers' salaries outweigh city size](#) (AZ Central)

[Some Small City Managers are paid Big-time Salaries](#) (Pressreader)

Executive Searches

[Cuyahoga County executive's pick for sheriff](#) (Cleveland.com)

[National challenges finding Finance Directors](#) (Municipal Finance Today)

[CFO Recruitment for Decatur, Alabama](#) (DecaturDaily.com)

[Covington Taps Firm to Find New City Manager](#) (River City News)

Efficiency Studies / Operations Audits

[Operations Audit & Management Plan for City of Sitka, Alaska](#) (KCAW Radio)

[Covington asks consulting firm for organizational analysis](#) (NKYTribune)

[Organizational efficiency audit of city proves hopeful](#) (CourierTraveler) #2, #3, #4, #5.

Local Government Emergency Planning & Preparedness

[Review of 25 Eastern US Emergency Response Plans](#) (Pocono Record)

*City Manager***Economic Development, Entertainment Districts & Professional Sports**

[From 'Cow Town' to 'City of the Future' \(Arizona Republic\)](#)

[Microsoft's Bill Gates Spends \\$80M On Majority Stake in West Valley Property \(KJZZ\)](#)

[Peoria OK's Key Piece of \\$90 million P83 Entertainment District \(Arizona Republic\)](#)

[West Valley \(Phoenix\) Making a Comeback \(AZ Bex\)](#)

[Glendale's \(AZ\) exit from \(NHL\) Coyotes arena deal is positive \(Reuters\)](#)

[Glendale and Goodyear pay spring-training ballpark debt \(AZ Central\)](#)

[Avondale's \\$800K development incentives \(Arizona Republic\)](#)

[Glendale, Goodyear Struggle to pay \\$260 million spring-training ballpark debt \(AZ Central\)](#)

Broadband & Military Base Realignment & Closure (BRAC)

[Luke AFB Transitions, New Missions Could Ripple \(AZ Republic\)](#)

[Webinar for Municipalities on Building Gigabit Networks \(BroadbandBreakfast\)](#)

Management & Governance

[The Business Case for Superior Project Leadership \(iMeetCentral\)](#)

[Delray looks to upgrade software, safety in billing department \(South Florida Sun Sentinel\)](#)

Executive Search Ethos & Attributes

Below are some key attributes about our services and results:

➤ **Diversity**

Municipal Solutions has extensive contacts with more than 10,000 public sector professional individuals and organizations – many of whom represent women and minorities. As a result, are thus able to identify and bring a diverse group of finalists to the Town.

➤ **Quality and Client Satisfaction**

We are selective with new assignments. When we dedicate ourselves to a client, we dedicate ourselves to getting the job done correctly. Because all of our key people are former public-sector administrators, we aim to deliver on time and on budget. We perform the comprehensive background investigations and we offer the best warranty (2-years) in the business.

➤ **Completion of Projects within Budget**

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

➤ **High-quality Reputation**

We have an outstanding reputation and commitment to quality and value. Our work is not done until the client is satisfied. That means we go the extra mile and expend extensive effort and energy to provide the client with expected satisfaction. We do not ask the client for additional fees. Rather, we accept these situations as part of our cost of doing business. We believe that once a contract is signed, we have an obligation to fulfill its requirements excellently and within the budgeted amount.

➤ **Completion of Projects on Schedule**

We routinely complete our assignments in 60 to 90 days. Further, since we began performing recruitments, we have never missed a project milestone.

City Manager➤ Search Completion Record

In every case for which we have been selected to perform a senior executive search, the search has been completed and the client has selected from one of our recommended candidates. We have never been fired before a search was completed.

➤ Prior Names and Litigation

Municipal Solutions has never been involved in any litigation in the United States, except to testify as an expert witness on behalf of one of the parties. Our company has always operated under its current name. Our performance has never been questioned to the point that legal action resulted.

➤ Insurance

To protect our clients, Municipal Solutions maintains the following insurance coverages: (1) General Liability insurance of \$2 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 \$2 million per occurrence. 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.

Executive Recruitment & Interim Management Team

Our Executive Search Team is highly motivated!

Each of our team members bring a uniquely local government skill set and a refreshingly creative perspective to the search process. Municipal Solutions consultants are among the best and brightest Public Administrators in the United States. Our collaborative-consultant network of 100s of highly-qualified public administrators assure each and every client familiarity and sensitivity to local & regional issues with a toolbox of resources available to assist at every level of government.

Our Executive Search consultants have conducted more than 400 public and private-sector searches for clients in twenty-three states. The basic approach we have presented in the Scope of Services section of this document. It has been refined over the years to the point where it is problem-free.

Key personnel that will be utilized in this project are listed below.

David Evertsen –Principal consultant to +5,000 public servants in the US and Globally.

Marie Lopez Rogers – former President of the National League of Cities and nationally-recognized by Presidents Obama and Biden for her leadership w/ women, Hispanics and African Americans.

Greg Bayor – highly-experienced Senior Executive and MD Public Administrator.

Sean Baenziger – Senior Associate, has assisted +50 national executive searches.

Kathryn Knutsen & Becky Smith – have conducted 1000s of recruitments in health care and local government. Experts in HR, candidate evaluations, background / reference / employment checks and interviewing.

Cristian & Roberto Morelli – conduct interviews and assembles candidate background reports.

David A. Evertsen, *CEO & Principal
Recruitment Manager*

Mr. Evertsen has been recognized nationwide for his ability to "make significant contributions while facing difficult constraints," and has repeatedly positioned agencies and staff to handle tremendous and possible unanticipated change, due in part to knowing "how to get the job done, through analysis, vision, and successful collaboration of skilled resources." He is an accomplished public speaker in local, national and international settings.



Mr. Evertsen has successfully managed 1,000's of consultants, trained more than 14,000 civil servants while managing more than 300 consulting projects on 4 continents in the past 20 years – including design and facilitation of more than 100 organizational development and strategic planning workshops and trainings. His professional experience includes: Arbitrator, Facilitator, Negotiator, Commercial, Industrial and Residential Developments, Recruiter, Government Relations, Statistician, Data Modeler, Emergency Management Planner, Urban Planner, Master Trainer, Chief Executive, Chief of Party, Team Leader, Public Speaker and advisor to Governors, Senators and Congressmen.

He has personally managed more than 300 client Human Resource projects which include:

- ❑ Executive Searches & Interim Placements for Blythe, California City, Desert Hot Springs, Madera, and Coachella, CA; El Mirage, Goodyear, Scottsdale, and Glendale, AZ; Bellville, Edinburgh, Lampasas, Port Arthur, TX; Greenville Utilities Commission (GUC), NC; Largo, St Cloud, Daytona Beach, FL; Wilson, AK; Hanover, NH; Norristown, PA.
- ❑ Organizational Development & Change Management for the Cities of Covington, KY, Beachwood, OH; Syracuse, UT; Sitka, AK; Fort Collins, CO; Arkansas City, KS; Delray Beach, FL; Clearfield, UT; Daytona Beach, FL; Delray Beach, FL; Parkland, FL; Tequesta, FL; Jupiter Island, FL; and La Habra Heights, CA.
- ❑ Personnel Compensation, Classification and Restructure for the cities of La Habra Heights, CA; Nogales, Guadalupe & Safford, AZ; Gallup, NM; Pleasant View & Harrisville, UT; Shawnee, OK; Elko, NV; Huron, SD; Walker, MI.
- ❑ Diplomatic Missions & International Development in for local, provincial and national governments in Afghanistan, Bangladesh, Bosnia, Iraq, Lebanon, Libya, Tunisia and Myanmar (Burma).
- ❑ Strategic Planning work for Avondale, AZ; Sitka, AK; Hurricane, UT; Mesquite, NV; Goodyear, AZ; Queen Creek, AZ; Buckeye, AZ; Flagstaff, AZ; and local and national governments in Bangladesh, Bosnia, Lebanon, Afghanistan, Libya and Iraq.

His four degrees include a Master's in Public Administration (University of Kansas); Masters of Urban & Regional Planning (University of Kansas); Bachelor's in Political Science (Weber State University); and Associates Degree in Business from Ricks College (now BYU Idaho).

Marie Lopez Rogers, *Senior Associate*
Senior Recruitment Advisor

Marie Lopez Rogers recently served as President of the National League of Cities (NLC), **the nation's oldest and largest organization representing municipal government**. She was first elected to local office in 1996, and on January 1, 2006, she was elected as the nineteenth Mayor of Avondale, Arizona, and **the city's first Latina mayor**.



Mrs. Rogers grew up working side-by-side with her parents in the small migrant farm labor camps around the city. In 2011, President Barack Obama recognized her dedication to and accomplishments in local government at a national conference of Hispanic leaders.

Mrs. Rogers guided the transformation of her community. Avondale, **once tiny agriculture community, became one of the nation's fastest growing municipalities**. Avondale is home to the Phoenix International Raceway and was named the first Kids at Hope city in the United States.



She was appointed to serve on the Maricopa County Board of Supervisors in June 2014, served as a member **of the League of Arizona Cities & Towns' Executive Committee, where she received a Distinguished Service Award** and served as President of the Arizona Women in Municipal Government. Mrs. Rogers also **served on Arizona's Council of Governments, Maricopa Association of Governments' Executive Committee**, and served as its Regional Council Vice Chair.

Mrs. Rogers has also been active at the state government level. She was selected by U.S. Secretary of Homeland Security and former Arizona Governor Janet Napolitano, to serve on state of Arizona committees and task forces.

She is a founding and current member of the Hispanic Leadership Forum, an organization providing academic opportunities for rising leaders in the community. She received one of the highest awards in the state from the Latino community, when she was presented the Profiles of Success Special Recognition Award for her advocacy, leadership, and years of service to her community -- emphasizing the integration of the Hispanic community.

Mrs. Rogers received the Jacque Steiner Public Leadership Award for Children from the Arizona Children's Action Alliance, and was one of 25 women chosen by Governing Magazine to participate in its 2015 Inaugural Women's Leadership Class.

She and her husband Ed have been married 46 years. They have three sons and six grandchildren.

Sean Baenziger, *Senior Associate*
Senior Recruitment Advisor

Mr. Baenziger has worked with more than cities and towns on recruitments throughout the United States. He is highly effective in his interpersonal communications and understands what it takes to manage client expectations effectively. With his expertise in municipal government Executive Search, Mr. Baenziger has been called upon to assist in meeting with City Managers and Senior Staff, to understand the needs of the client, and to develop high-quality Position Descriptions which we use for marketing and advertising for the position. Because of his efforts, Mr. Baenziger has been a highly-valued member of the Municipal Solutions Recruitment Team.



Mr. Baenziger brings a strong background in research and analysis to Municipal Solutions. As a former Firefighter Paramedic and current Licensed Psychotherapist, he has ten years of experience working with state and local governments through public and private sector organizations. Since joining Municipal Solutions in 2002, his incisive ability to promptly get to the heart of a problem and accurately assess the facts **have led him to quickly become the firm's background check guru. His experience and training allow him to rapidly determine which candidates are the 'right- fit' for your organization.**

Mr. Baenziger has been involved as a background specialist in virtually every search Municipal Solutions has conducted. Some of his current and former executive search work history includes:

- ❑ Executive Searches & Interim Placements for Buckeye, Chandler, Scottsdale, AZ; Corpus Christi, Clay County, Miramar, Marco Island, Miami, Daytona Beach, Surfside, Lake Worth, Sewall's Point, FL; + 40; Prince William County, VA; Roanoke, VA; York County, VA; Winchester, VA; Portland, ME; Elmira, NY; Ankeny, IA; Polk County, IA; Greensboro, Fayetteville, Monroe and Union County, NC; Sunnyside, WA; Norristown, PA; Tacoma, WA; Matanuska-Susitna Borough, AK (listing only a few of +100).

As noted, the majority of Mr. Baenziger's work has come in the form of background examinations with the firm. Due to his extensive psychological training, he is quickly able to assess candidates' personalities and styles and determine if there are concerns in their past as well as if the candidates would be a good fit for **Municipal Solutions' clients. In the past Mr. Baenziger has served in a variety of municipal capacities** such as being a consultant for several private sector agencies with contracts with the **State of Utah's Division of Child and Family Services, as well as playing a principal role in the revision of North Port Fire Rescue District's Infection Control Plan.**

Mr. Baenziger obtained his Bachelor's Degree in Psychology from Brigham Young University, a Master's Degree in Social Work from the University of Utah, and an MBA from Brigham Young University. He is a certified Firefighter/Paramedic in both Florida and Utah. He currently resides in Chandler, AZ.

Kathryn Knutsen, *Senior Analyst*
Interviews, Backgrounds & Report Assembly

Ms. Knutson's prior employment includes stints with Palm Beach County's Department of Building, Planning, and Zoning, and with the County Health and Rehabilitative Services. She also worked with the State of Florida's Department of Corrections and with the State's Department of Employment Services. She was involved with a number of private and non-profit concerns, such as the Visiting Nurses Association and Oakwood Mental Health



Center of the Palm Beaches. She has an Associate's Degree in Business Education from West Georgia College in Carrollton, Georgia and currently [Kathryn resides in Oneida County, WI.](#)

Ms. Knutson has been involved in 100s of personnel projects and executive searches including:

- ❑ Executive Searches & Interim Placements for Buckeye, Chandler, Scottsdale, AZ; Bellville, Corpus Christi, Lampasas, Odessa and Port Arthur, TX; Coral Gables, Cape Coral, Clay County, Miramar, Marco Island, Miami, Daytona Beach, Surfside, Lake Worth, Sewall's Point, FL; Leesburg, Prince William County, Roanoke, York County and Winchester, VA; Portland, ME; Elmira, NY; Ankeny, & Polk County, IA; Greensboro, Fayetteville, Monroe and Union County, NC; Sunnyside, WA; Norristown, PA; Fayetteville, NC; Tacoma, WA; Matanuska-Susitna Borough, AK; Albany, DeKalb Co. & Doraville, GA.

Greg Bayor, *Senior Associate*
Senior Recruitment Advisor

In a career of more than 30 years, Mr. Bayor, has experience with both big-city and suburban governments. He has worked as Director of Recreation programs in the Cities of Baltimore and Rockville, Montgomery and Prince George County, MD, and the City of Tampa, FL. **Mr. Bayor's record in building relationships is unprecedented** – including community partnerships with the Baltimore Oriels, Baltimore Ravens, Tampa Bay Rays, Tampa Bay Buccaneers and more. He has personally recruited and managed more than 215 employees and managed departments as small as 10 and as many as 490 employees.



Mr. Bayor has an exceptional eye for talent and will be instrumental our recruitment process with clients in Florida, Maryland and Virginia.

Christian and Roberto Morelli, *Analysts*
Interviews, Backgrounds & Report Assembly

Cristian recently graduated with his **Master's Degree in International Relations. As a Senior Analyst, Cristian** assists Municipal Solutions on executive searches and compensation studies. He is a practitioner of government and an incredibly-gifted writer. Roberto is experienced in background searches, Executive Searches and Compensation Studies.

Other Consultants

Municipal Solutions has 160 active consultants in a variety of subject-matter areas which will be called into service when we need them. This includes IT / Communications, Police, Fire, Schools, Utilities, and other service areas. We also have a cache of Analysts and Senior Analysts who are on-call should we need them.

Extensive bios and client references can be reviewed on our website at <http://www.municipalsolutions.org>

Section 4 – Detailed Cost Proposal

Cost Options

Municipal Solutions provides a highly-discounted rate for multiple recruitments. Our standard (*negotiable*) price range of \$22,400 for a single search, is significantly reduced to \$20,400* and \$18,400* for a second and third search - if additional searches are requested during or within 1 year. See below.

Phase	Cost per search*		
	1 st recruitment	2 nd recruitment	3 rd recruitment
I. Needs Analysis & Interviews	\$4,900	\$2,900	\$2,900
II. Advertisement & Recruitment	\$5,200	\$5,200	\$4,200
III. Candidate Screening & Selection	\$5,200	\$5,200	\$4,200
IV: Coordination of Interviews & Selection	\$4,200	\$4,200	\$4,200
V: Contract Negotiation, Warranty, 6-mo Workshop	\$2,900	\$2,900	\$2,900
Total	\$22,400	\$20,400*	\$18,400*
		-\$ 2,000	-\$ 4,000

* if we modify the initial base recruitment profile.

Costs include all advertising, all travel expenses, and preliminary background checks. Expenses and fees associated with *Comprehensive* Finalist Background Checks and candidate travel for interviews are invoiced separately @ \$400 per background check.

Payment will be rendered as follows:

- Payment of Phase I up-front for mobilization and travel costs,
- Progress payments at the end of each Phase II – V as indicated above,
- Separate invoice for criminal / civil background checks and employment / education verification.

The above fee is based on anticipated efforts from Municipal Solutions, llc with the understanding that unexpected or changing circumstances will not be encountered during the engagement without revision to the terms of this agreement. Should such revisions be necessary, the hourly rate of \$150 is provided for consideration of extension of services.

Warranty

The Municipal Solutions team offers the best warranty in the industry. Provided we conduct the full search and assuming the City selects from the candidates we recommend, we warrant the following:

- 1) We will not approach the selected candidate concerning any other position so long as the individual is employed by the City.
- 2) If the selected individual leaves for any reason other than an act of God (for example, total incapacitation or death) within the first year, we will repeat the search at no charge. If he/she departs during the second year for any reason other than an act of God, we will repeat the search for the reimbursement for expenses only.
- 3) If you are not satisfied with any of the candidates we present, we 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.

Section 5 – Recruitment Completion Schedule

Completion & Deliverables Timeline

Our standard recruitment process requires 90-days to assure a high-quality result which produces a candidate who has a compelling reason to be in your community, and who is committed to building a future with you. Below is an illustrated standard 90-day timeline.



Draft Recruitment Schedule

PHASE I: NEEDS ASSESSMENT & INTERVIEWS

- September 11th: Municipal Solutions (MS) begins interviewing the Mayor, City Council and Management Team to understand the work environment, challenges and expectations for the *City Manager*.
- September 12th: MS begins drafting the recruitment profile for publications and prospective candidates.
- September 26th: MS submits the draft of the full recruitment profile to the City Council for review. Comments will be due back by September 27th.

PHASE II: RECRUITING

- September 28th: MS begins networking, distributes and posts the full recruitment profile on its website, and submits it to the appropriate publications. MS begins forwarding candidates details to the City Council.
- October 22nd: Closing date for submission of applications. MS reports recruitment results.
- October 23rd: Forwards the Candidate Report #1 and materials to the City Council including the resumes, cover letter w/ recommended 10-12 first-round candidates.

*City Manager*PHASE III: SCREENING, REFERENCE CHECKS AND CREDENTIAL VERIFICATION

- October 24th: *Video conference w/ City Council to review 1st-round candidates.*
MS begins candidate pre-screening of selected First-round candidates including Internet / newspaper archives, candidate intro. & writing sample.
- October 29th: MS provides Candidate Report #2 – the results of the first-round candidate pre-screening report to the City Council.
- October 30th: *Video conference w/ City Council to review 2nd-round candidates.*
8–10 2nd-round candidates selected for background checks.
- October 30th: Comprehensive background investigations begin.
- November 19th: MS forwards Candidate Report #3 – including the complete background checks and candidate profiles to City Council for review.
- November 21st: City Council selects / confirms finalists.

PHASE IV: INTERVIEW PROCESS COORDINATION AND SELECTION

- November 1st: Interview design and coordination
- Nov 30 – Dec 1st: Finalist social and Interview Panels.
City Council selects its new the *City Manager!!!*

PHASE V: TRANSITION ASSISTANCE & WARRANTY

- December 1 – 14th: Contract Negotiation and Transition Assistance.
- December 15th: Target date – *City Manager begins!!*

Section 6 – Client References & Firm Experience

Over the past 20 years, we have helped 100s of local governments, provincial governments, school districts and national government agencies save \$ millions through Compensation Studies, Organizational Efficiency Audits, Policy Manual revisions, Organizational Structure Realignment and Process Mapping. In addition to the cost savings, our clients have realized greater revenue collections, reduced fraud & improved public access to public services.

Client References

1. Crandall Jones, Administrator Norristown Municipality, PA (pop.34,000) Phone: (970) 221-6505 cjones@norristown.org	2. Julia N. Griffin, Town Manager Town of Hanover, NH (pop. 8,500) Phone: (603) 643-0701 Julia.Griffin@hanovernh.org
3. Len Golden Price, Admin. Services Director Collier County Gov't, FL (pop.300,000) Phone: (239) 252-8450 Len.Price@colliercountyfl.gov	4. Cindy Muncy, Asst City Manager City of Odessa, TX (pop. 127,000) Phone: (432) 335-3232 cmuncy@odessa-tx.gov
5. Anthony Roberts, HR Manager City of Fort Lauderdale, FL (pop.183,000) Phone: (859) 576-7477 ARoberts@Fortlauderdale.gov	6. Crystal Dyches, City Manager City of El Mirage, AZ (pop. 35,043) Phone: (507) 461-5954 jnnfrprentice@yahoo.com
7. Patrick Smock, Recruiting Manager Cuyahoga County Gov't, OH (pop. 1,200,000) Phone: (216) 443-3187 psmock@cuyahogacounty.us	8. Trudy Lewis, City Manager City of Hutchins, TX (pop. 5,178) Phone: (972) 225-6121 tlewis@cityofhutchins.org
9. Maryanne Ustick, City Manager J.M. DeYoung, Asst. City Manager City of Gallup, NM (pop.21,800) Phone: (505) 863-1218 mustick@gallupnm.gov	10. Mike Welsh, Mayor City of North Pole, AK Phone: (907) 651-2555 northpolemayor@gmail.com

In addition to the client references already provided, additional references are provided below.

Similar Projects

The following pages contain a *partial* list detailing projects completed by members of our Executive Search and Interim Public Management team. *Includes the side / population of the city / town / service area.*

2022-23	
Town Manager Town of Winchendon, MA <i>pop (11,000)</i>	City of Presque Isle???
Sonterra Metropolitan Utility District <i>Austin, TX (pop. 15,000)</i>	CIO - City of North Las Vegas <i>(pop. 274,000)</i>
City Administrator <i>Windsor Heights, IA (pop. 5,170)</i>	City Administrator <i>Woodbury, NJ (pop. 9,000)</i>
Asst. City Manager / Community Dev. Director, <i>Arvin, CA (pop. 21,800)</i>	Development Services Director <i>New Smyrna Beach, FL (pop. 22,400)</i>
Assistant City Administrator <i>Moline, IL (pop. 41,920)</i>	City Manager <i>Arvin, CA (pop. 21,800)</i>
2021	
Code Enforcement Chief San Bernardino County, CA (pop. 2,180,000)	Interim City Administrator Woodbury, NJ (pop. 9,000)
Interim Town Manager Dewey-Humboldt, AZ (pop. 5,000)	Interim Town Clerk Dewey-Humboldt, AZ (pop. 5,000)
Director of Information Technology Collier County Government, FL (pop 380,000)	Chief of Police City of Fort Lauderdale, FL (pop 182,600)
2020	
Director of Finance City of Odessa, TX (pop 127,000)	Director of Human Resources City of Odessa, TX (pop 127,000)
Director of Information Technology Cuyahoga County, OH (pop 1,250,000)	Director of Human Resources Cuyahoga County, OH (pop 1,250,000)
Director of Finance Hutchins, TX, (pop 5,500)	County Sheriff (appointed) Cuyahoga County, OH (pop 1,250,000)
2019	
Interim Financial Services Manager Madera, CA (pop.66,508)	Interim Director of Financial Services Madera, CA (pop.66,508)
Interim Finance Director St Cloud, FL (pop. 48,000)	Interim City Manager Madera, CA (pop.66,508)
Director of Finance, Corpus Christi, TX (pop 325,000)	Director of Information Technology, Grenville Utilities Commission (pop 92,000)
Town Manager, Town of Payson, AZ (15,500)	
2018	
Interim Finance Dir, Bellville, TX (pop. 4,500)	Interim City Mgr. California City, CA (pop.13,707)
Interim Mgr. of Law Enforcement Operations, Murray County, MN (pop. 8,413)	Interim Assistant to the City Manager, El Mirage, AZ (pop. 35,043)
Interim City Engineer Oak Harbor, WA (pop 23,204)	Police Chief El Mirage, AZ (pop. 35,043)

City Manager

City Manager, El Mirage, AZ (pop. 35,043)	Fire Chief El Mirage, AZ (pop. 35,043)
City Manager, City of Blythe, CA (pop. 19,693)	Finance Director, Norristown, PA (pop. 34,370)
2017	
<i>Interim Finance Dir.</i> , St. Cloud, FL (pop. 48,000)	Finance Director, St. Cloud, FL (pop. 48,000)
Interim Community Development Director City of Desert Hot Springs, CA (pop. 27,900)	City Manager / Economic Development Director Wilson City / Town of Wilson, AR, (pop.850)
Economic Development Director, City of Covington, KY (pop 41,000)	<i>Chief Financial Officer (CFO), City of Decatur, AL (pop 55,800)</i>
<i>Interim Public Works Director,</i> City of Coachella, CA (pop 43,092)	Interim Sr. Planner, Desert Hot Springs, CA (pop. 27,900)
City Manager & Finance Director, Covington, KY (pop 41,000)	Economic Development Director, City of Covington, KY (pop 41,000)
2016	
HR Director, Port Arthur, TX (pop. 53,818)	Public Works Director, Salina, KS, (pop. 47,707)
Public Information Officer, Port Arthur, TX (pop. 53,818)	Director of Building Inspection & Code Enforcement, Port Arthur, TX (pop. 53,818)
<i>Interim Finance Director, City of Madera, CA (pop. 64,444)</i>	
2015	
City Manager, Roanoke, VA (pop. 98,465)	County Administrator, York., VA (pop 66,269)
City Manager, Winchester, VA (pop. 27,276)	Utility Director, Danville. VA (pop. 42,907)
Attorney, Prince William Co., VA (pop 428,000)	City Manager, Norwich, CT (pop. 40,347)
City Manager, Indianola, IA (pop. 15,108)	Public Works Director Norristown, PA (pop.34,370)
2014	
Fire Chief, Town of Hanover, NH (pop. 11,260)	City Manager, Monroe, NC (population 33,500)
City Manager, Ankeny, IA (pop. 45,600)	Village Manager, Bal Harbour, FL (pop. 3,300)
County Admin., Clackamas, Co. OR (pop. 383,900)	City Manager, Elmira, NY (pop. 29,200)
Treasurer, Miami, FL (pop. 408,000)	CEO/Borough Admin, Bal Harbour, FL (pop. 3,300)
2013	
County Admin, Okaloosa, FL (pop. 183,500)	City Manager, Doraville, GA (pop. 8,500)
Director, Engineering, Public Works and Utilities, Hallandale Beach, FL (pop. 39,000)	Watershed Mgmt. Dir, DeKalb Co., GA (pop 691,900)
City Manager, Scottsdale, AZ (pop. 217,400)	HR Director, Cape Coral, FL (pop. 154,300)

City Manager

HR Director, W Palm Beach, FL (pop. 101,000)	CEO / Borough Admin., Miami, FL (pop. 408,000)
Police Chief, St. Augustine Beach, FL (pop 7,026)	County Manager, Union Co., NC (pop. 198,600)
Police Chief Screening of Candidates, Melbourne FL (pop 82,800)	CEO/Executive Director of the Sewerage and Water Board of New Orleans, LA - Pop Huge
Police Chief, Golden Beach, FL (pop 959)	HR Director, Gainesville FL (pop 125,000)
City Manager, Fife, WA (pop 8,700)	City Manager, Chamblee, GA (pop 17,000)
County Administrator, Broward County, FL (pop. 1,800,000)	County Administrator, Hernando County, FL (pop. 172,800)
City Manager, Miramar FL (pop. 125,000)	City Manager, Roanoke, VA (pop 96,000)
City Attorney, West Melbourne, FL (pop. 15,000)	City Manager, Cooper City, FL (pop. 32,000)
City Manager, Albany, GA (pop. 75,600)	City Manager, Coral Gables (pop.43,000)
City Manager, Fort Pierce, FL (pop 41,900)	City Manager, Key West, FL (pop 24,600)
Community Development Director, Miami, FL (pop. 408,000)	City Manager, Cottonwood Heights, UT (pop. 34,000)
Economic Development Director, Loudoun County, VA (population 326,000)	City Manager, Coral Gables, FL(pop 43,000)
General Manager, Tampa Bay Water (pop. served 2,400,000)	Police Chief, Sunny Isles Beach, FL (pop 20,832)
Executive Director, Valdosta-Lowndes County Industrial Authority, GA (serving a pop. 92,000+)	Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900)
Human Resources Office, Loudoun County, VA (pop. 326,000)	Executive Director, Onslow Water & Sewer Authority (Jacksonville, NC) (pop. 160,000)
City Manager, Hallandale Beach, FL (pop 39,000)	City Manager, Greensboro, NC (pop 259,000)
City Manager, Cape Coral, FL (pop 154,300)	City Manager, Fayetteville, NC (pop 208,000)
City Manager, Cottonwood Hts, UT (pop 34,000)	Village Manager, Key Biscayne, FL (pop. 11,000)

See Appendix A for a more detailed listing of Executive Recruitments completed by our consulting team.

Exhibit A – Executive Search – Completed Recruitments

Other Completed Searches - Prior to 2013

(including those completed by current consultants and former partners)

City Attorneys

City Attorney, Roanoke, VA (population 96,000) in 2012

City Attorney, West Melbourne, FL (population 15,000) in 2008

Community Development/Growth Management/Planning

Assistant Director of Community Development, Largo, FL (population 74,000) in 2004, 2005

Community Development Director, Miami, FL (population 408,000) in 2008

Community Development Director, Safety Harbor, FL (population 18,000) in 2006

Community Development Director, Tamarac, FL (population 55,500) in 2007

Development Services Director, Daytona Beach, FL (population 65,000) in 2005

Director of Capital Projects, New Orleans, LA (population 323,000) in 2008

General Manager, North Sarasota Redevelopment District, Sarasota (population 53,000) in 2008

Growth Management Director, St. Lucie County, FL (population 261,000) in 2005

Growth Management Manager, Wellington, FL (population 55,000) in 2009

Housing and Community Development Director, West Palm Beach, FL (pop. 101,000) in 2007

Planning Administrator, Daytona Beach, FL (population 65,000) in 2007

Planning Director, Osceola County, FL (population 235,000) in 2005

Director of Planning, Roanoke, VA (population 96,000) in 2012

Economic Development / Redevelopment

Economic Development Director, Charlotte County, FL (population 170,000) in 2007

Economic Development Director, Collier County, FL (population 328,000) in 2012

Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009

Economic Development Director, Roanoke, VA (population 96,000) in 2012

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

Economic Development Director, Loudoun County, VA (population 326,000) in 2010

Redevelopment Director, Daytona Beach, FL (population 65,000) in 2007

Economic Development Director, St. Johns County, FL (population 162,000) in 2011

Executive Director, Valdosta-Lowndes County Industrial Authority, GA (serving a population 92,000+) in 2006 and 2011

Executive Director, Technological Research and Development Authority, FL (serving a statewide population) in 2006

Engineers

Assistant City Engineer, Melbourne, FL (population 75,000) in 2008

County Engineer, Polk County, FL (population 500,000) in 2006

Deputy County Engineer, Martin County, FL (population 140,000) in 2006

City Engineer, Gulfport, MS (population 90,000) in 2008

City Engineer, Sunny Isles Beach, FL (population 17,000) in 2006

Engineering Manager, Sumter County, FL (population 70,000) in 2005

City Manager

Staff Engineer, Wellington, FL (population 55,000) in 2009

Facilities Management

Centroplex Director, Orlando, FL (population 197,000) in 2004

Lakeland Center Director, Lakeland, FL (population 87,000) in 2004

Finance and Budget

Budget and Financial Services Director, Polk County, FL (population 500,000) in 2006

Budget Director, St. Petersburg, FL (population 248,000) in 2009

Controller, City of Orlando, FL (population 197,000) in 2007

Chief Financial Officer, Hillsborough Area Regional Transit, FL (population 1,000,055) in 2005

Chief Financial Officer, City of Orlando, FL (population 87,000) in 2005

Deputy Director of Management, Budget and Accounting, Orlando, FL (pop. 197,000) in 2004

Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012

CEO / Borough Administrator, Altus, OK (population 19,800) (background check) in 2012

CEO / Borough Administrator, Daytona Beach, FL (population 31,860) in 2012

CEO / Borough Administrator, Fort Walton Beach, FL (population 20,000) in 2006

CEO / Borough Administrator, Lauderdale Lakes (population 32,000) in 1998

CEO / Borough Administrator, Oregon City, OR (population 31,860) in 2012

CEO / Borough Administrator, St. Petersburg, FL (population 248,000) in 2010

CEO / Borough Administrator, Sunny Isles Beach, FL (population 17,000) in 2010

CEO / Borough Administrator, Surfside, FL (population 5,700) in 2012

CEO / Borough Administrator, Tamarac, FL (population 55,500) in 2005 and 2009

CEO / Borough Administrator, West Palm Beach, FL (population 101,000) in 2007

Manager, Office of Management and Budget, Lake Worth, FL (population 37,000) in 2010

Housing/Building

Assistant to the Public Works Director– Affordable Housing, Broward County, FL (population 1,800,000) in 2004

Building Official, Jupiter Island, FL (population 580) in 2005 and 2010

Building Official, Miami Beach, FL (population 91,000) in 2005

Building Department Director, Osceola County, FL (population 235,000) in 2005

Assistant to the Public Works Director– Affordable Housing, Broward County, FL (population 1,800,000) in 2004

Building Official, Jupiter Island, FL (population 580) in 2005 and 2011

Building Official, Miami Beach, FL (population 91,000) in 2005

Building Department Director, Osceola County, FL (population 235,000) in 2005

Building Official, Sewall's Point, FL (population 2,000) in 2006

Building Official, Tamarac, FL (population 55,000) in 2008

Housing and Community Development Director, West Palm Beach, FL (pop. 101,000), 2007

Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006

Director of Personnel, Fulton County, GA (population 992,000) in 2010

Human Resources Office, Loudoun County, VA (population 326,000) in 2011

Human Resources Administrator, Martin County, FL (population 140,000) in 2007

Personnel Director, North Miami, FL (population 56,000) in 2001

Human Resources Director, Osceola County, FL (population 235,000) in 2006

City Manager

Human Resources Director, City of Sarasota, FL (population 55,000) in 2002
Personnel Director, Vero Beach, FL (population 17,900) in 2003

Human Services

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

Information Technology

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

Parks/Recreation/Libraries

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

Public Safety

Fire Chief, Hanover, New Hampshire (population 11,260) in 2014
Fire Chief, Daytona Beach, FL (population 65,000) in 2006
Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012

Public Works

Public Works Director, Salina, KS (population 47,000) in 2015)
Public Works Director, Chandler, AZ (population 250,000) in 2007
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Director / Capital Projects Manager / City Engineer, Sunny Isles Beach, FL (pop. 17,000) in 2007
Public Works Director, Tamarac, FL (population 55,500) in 2003
Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008
Solid Waste Director, Hillsborough County, FL (population 1,000,055) in 2005

Transportation

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

Completed Searches – Utilities

Environmental Services Director, Largo, FL (population 74,000) in 2006
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003

City Manager

Executive Director, Escambia County Utilities Authority, FL (90,000 customers) in 2002
Executive Dir., Onslow Water & Sewer Authority (Jacksonville, NC) (pop. 160,000) in 2009
General Manager/CEO, Orlando Utilities Commission, FL (190,000 customers) in 2004
General Manager, Tampa Bay Water, FL (population served 2,400,000) in 2008
Utilities Director, Charlotte County, FL (population 170,000) in 2007
Utilities Director, Daytona Beach, FL (population 65,000) in 2004
Utilities Director, Lake Worth, FL (population 37,000) in 2009
Utilities Director, Palm Bay, FL (population 101,000) in 2005
Executive Director, Environment and Infrastructure, Pinellas Co., FL (pop. 917,000) in 2012
Utilities Director, Polk County, FL (population 500,000) in 2004
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011

Work Force Management

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

Other

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

Recruitment Profiles

See attached sample Recruitment Profiles.

Candidate Background Reports

See attached sample Candidate Background Reports.

FINALIST CANDIDATE
QUALIFICATIONS AND BACKGROUND REPORT

Executive Director – Anthem, AZ



Mr. Aaron Baker

This report includes the following research:

Resume, Cover letter, Candidate Introduction / Writing Sample, Disclosure Statement, Personal Interview with the candidate, Criminal / Civil background checks & Employment & Education verification and Reference Interviews.

FINAL UPDATE: Criminal / Civil Background check and Employment and Education Verification complete and verified 18 of 20 with 2 pending. Reference Interviews were completed and very positive.

The common term used by all reference interviewees was “trust”.



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Executive Background Summary



Background:

Mr. Baker comes with extensive experience with a long tenure in the same City of Mesquite, NV starting as a planner and moving through several positions and now serving as the City Manager. His experience gives him experience in working with many different aspects and diverse situations of the city and among several departments and with staff. He has a high level of respect from the staff and local members of the community. He is highly respected by those with whom he serves and works with. He would be a candidate that would offer a high level quality while he takes the time to have outstanding relationships with city employees, members of the community and developers in the city.

His experience would be complimentary of Anthem and the community.

Employment:

- | | |
|--|----------------|
| • City Manager – City of Mesquite, NV | 2019 – Present |
| • Assist. City Manager – City of Mesquite, NV | 2016 - 2019 |
| • City Liaison Officer – City of Mesquite, NV | 2013 - 2016 |
| • Interim Ec. Dev. Dir. – City Of Mesquite, NV | 2012 - 2013 |
| • Econ. Dev. & Redev. Associate – City of Mesquite, NV | 2010 - 2011 |
| • Associate Planner – City of Mesquite, NV | 2007 - 2010 |
| • Assist. Planner/GIS Analyst – City of Mesquite, NV | 2006 - 2007 |
| • Engineering Intern – City of Orem, UT | 2005 |

Education and Certifications:

- | | |
|---|--------------------------|
| • Masters of Public Administration | University of Nevada |
| • Bachelor Geography, Urban, Rural, Environ. Planning | Brigham Young University |
| • Bachelor of Russian Studies | Brigham Young University |
| • ICMA Member | |
| • Certified Planner with APA | |

Cover Letter & Resume



Cover Letter

702.306.0047
aaronrichardovich@
gmail.com

324 Cona Circle
Mesquite, NV
89027

September 10, 2021

Chairman Bob McKenzie
3701 W. Anthem Way
Anthem, AZ 85086

Dear Chair McKenzie,

In reviewing the duties for the next executive director, I feel that I can add immediate value to the Anthem team. As an effective communicator with over 16 years of local government experience including most recently as Mesquite, NV city manager and past experience as a homeowner's association president, I am uniquely qualified to lead Anthem.

In Mesquite, the city manager is also the chief executive officer of the organization. With over 200 employees and a total budget of \$69 million, my responsibilities were broad and complex. Consequently, I can handle the budget and operational requirements of the executive director position.

When I took over in Mesquite, I worked with the staff to modernize the budget process and documents. With much shepherding, the budget document moved from being an Excel spreadsheet towards being a content-rich, answer-laden guide to where Mesquite was going over the next few years. As part of this transition, staff implemented a new budget development process and established a realistic and funded capital improvement program.

As part of the budget overhaul, we started systematically reviewing and updating the City's financial policies. They had not been updated since 2000. This process allowed us to have productive conversations with the City Council and residents about public funds and how they should be managed.

I also increased Council and community awareness about the City's finances. Specifically, I introduced new monthly financial statements that consolidated almost 100 pages of numbers and text into four pages of easily digestible, meaningful information that Council and the public could reference at a glance.

Because of my work experiences, I fluently speak the language of local government. I have been the city staffer resolving an issue with a contractor or resident. I have been the city manager negotiating terms of a development agreement. I have privately and publicly conversed with elected officials about their concerns, and presented countless times before boards and other public agencies. Consequently, I would be a powerful advocate for Anthem when working with regulatory agencies because I know how to speak to each individual group.

Similarly, I know how to work with residents. Daily, I worked with community members to find reasonable, commonsense solutions that met their needs and the needs of the City. While saying yes is not always possible, you can still end a conversation as friends.



When I arrived in Mesquite in 2006, Pulte Homes was starting to develop their 2,000-acre Sun City Mesquite project. Since the project started, I personally worked with Pulte representatives to review and gain approval for multiple facets of their project, negotiated development agreement amendments and worked with Pulte on general matters involving the Mesquite project. Later, as city manager, I worked closely with Quincy Edwards, Las Vegas Region Vice President of Land, regarding Pulte's future plans for the project. Additionally, I have worked with Phil Crapo the community manager for Sun City Mesquite on several matters. So, I feel like I have a good working knowledge of Pulte, their products and their way of doing business.

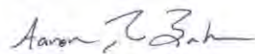
In my private life, I served as an HOA board member and president for my neighborhood association. While on the board, we dealt with a variety of homeowner requests from architectural reviews to unpaid dues. Consequently, I feel comfortable working in this environment.

Finally, communication is very important to me. Consequently, I prioritize a collaborative working environment both internally and externally and look forward to doing the same in Anthem. In Mesquite, I was the face of the city to the region as I oversaw public and government affairs and served for several years as public information officer. Starting in 2013, I worked with the City's lobbyists to advance the City's legislative agenda. I find communicating with residents, businesses and other governmental agencies to be very rewarding.

In order to ensure a good pattern of communication with the elected officials, when I became city manager I established an onboarding process for newly elected officials that included a handbook, training sessions and meetings with key staff and others. Prior to that, newly elected officials had to figure things out on their own. These sessions greatly benefitted both the electeds and the staff.

Given my management experience, my ability to speak in an understandable way to different government agencies, my knowledge of Pulte and homeowner's associations and my emphasis on being a consistent communicator, I can start adding value and helping the Anthem team on day one.

Respectfully,



Aaron R. Baker

Resume

Aaron R Baker

702.808.0047

aronrichardovich@gmail.com

324 Quie Clon

Mesquite, NV

89027

EXPERIENCE

City Manager, City of Mesquite, Nevada

September 2019-May 2021

Served as the City's Chief Executive Officer for all city operations. Directed the City's response to COVID-19 and oversaw all related operations and expenses. Obtained concessions from labor unions due to impacts of COVID-19. Updated a number of city processes to account for COVID-19. Implemented the City's Strategic Plan within the budget process and document. Overhauled the City's budget process for both the regular budget and the CIP, providing for long-term funding and sustainability. Initiated an overhaul of the City's economic development activities and responsibilities. Directed multiple code amendments to simplify and streamline business development standards. In conjunction with the City's insurance provider, set up a new employee wellness program. Established a new employee safety program.

Assistant to the City Manager, City of Mesquite, Nevada

September 2016-September 2019

Resolved highly complex and sensitive projects assigned by the City Manager. Oversaw day-to-day operations of the city manager's office. Guided the citywide budget drafting process. Developed and implemented financial policies and procedures to strengthen the city's financial position. Oversaw eight different departmental and operational budgets and related personnel. Participated in labor negotiations. Served as the city's primary contact for economic development activities. Directed all redevelopment related activities. Managed the City's real estate portfolio and negotiated all transactions involving City property. Supervised citywide grant efforts. Oversaw public and government affairs for the city. Acted as a lobbyist for the City of Mesquite and supervised the city's contract lobbyists.

City Liaison Officer, City of Mesquite, Nevada

July 2013-September 2016

Provided high level operational and analytical support to the City Manager. Researched, analyzed and recommended to the city manager and city council solutions to problems and new or revised services. Worked as Redevelopment Director and coordinated economic development efforts. Liaised between the city manager's office and city departments, outside agencies and the general public. Served as the city's public information officer.

Interim Economic Development Director, City of Mesquite, Nevada

January 2012-June 2013

Directed all activities and operations of the City's Economic Development Department including redevelopment, housing and business development, and public affairs efforts. Planned, negotiated, and implemented complex development projects in the City. Coordinated assigned activities with outside agencies and the general public. Provided highly responsible and complex staff assistance to the City Manager.

Economic Development and Redevelopment Associate, City of Mesquite, Nevada

July 2010-December 2011

Provided technical and professional analysis on economic development, redevelopment, housing, and business development efforts. Conducted studies, and made recommendations on development and redevelopment efforts. Generated and maintained economic development-centric website and assisted in all other public affairs efforts.

Associate Planner, City of Mesquite, Nevada

May 2007-June 2010

Performed technical and professional community planning work. Prepared community, corridor, and long-range plans. Wrote and administered grant applications. Oversaw the city's transportation model. Generated recommendations on redevelopment, transportation, special projects, and code revisions.

Assistant Planner/GIS Analyst, City of Mesquite, Nevada

May 2006-April 2007

Performed planning work for special projects, zoning and subdivision work. Completed a variety of CAD and GIS technical duties as needed to assist in the preparation, review and maintenance of planning drawing documents, reports, and databases.

Engineering Intern, City of Orem, Utah

January 2005-December 2005

Worked as liaison between the city and citizens, acquiring property and easements on multiple capital projects. Drafted legal agreements and created visual exhibits. Performed due diligence research for property acquisition. Managed project documents and files.

EDUCATION

University of Nevada, Las Vegas, Las Vegas, NV, August 2017

Masters of Public Administration

Brigham Young University, Provo, UT, April 2006

BS - Geography: Urban, Rural, and Environmental Planning emphasis

BA - Russian

Minor - Business Management

COMPUTER SKILLS

Microsoft Office, G Suite, Caselle, AutoCAD, Esri ArcGIS and TransCAD

ACCOMPLISHMENTS AND MEMBERSHIPS

Member of International City/County Management Association
Certified Planner through the American Planning Association
Member of the Redevelopment Association of Nevada
2011 City of Mesquite Administrative Services Employee of the Year
Leadership Mesquite 2010 Graduate
2nd Miler Award from Boy Scouts of America
Presented professional paper at Esri 2007 User Conference.

FOREIGN EXPERIENCE

Suzhou, China: Fieldwork in land use planning, environmental change and economic development.

St. Petersburg, Russia: Served two years as a volunteer representative of The Church of Jesus Christ of Latter-day Saints

Disclosure Statement





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Candidate Personal Disclosure Questionnaire

Name of Candidate: Aaron Baker

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 your 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 convicted of a felony? Yes No
2. Have you ever been involved in a domestic abuse incident that resulted in your being arrested or that was covered by the media? Yes No
3. Have you ever declared bankruptcy? 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 that resulted in a lawsuit? Yes No
6. Have you ever been convicted of driving while intoxicated or under the influence of illegal or controlled substances? Yes No
7. Have you ever pursued legal action against a current or former employer? Yes No
8. **Please list the URL** for any personal social media accounts you have or use:
 - a. LinkedIn Yes No URL: https://www.linkedin.com/in/aaron-baker-647b561ab
 - b. My Space Yes No URL:
 - c. Twitter Yes No URL:
 - d. FaceBook Yes No URL: https://www.facebook.com/aaron.baker.50552
 - e. Instagram Yes No URL:
 - f. Other: . URL:
9. Is there anything else in your background which is *unresolved* that might cause a reasonable person concern if he/she were to become aware of it through the press, blog, or other public medium. Yes No If yes, please use another page to explain.

Attested:

Aaron Baker
Signature

9/20/21
date

Please (a) print, (b) sign with your *actual signature*, (c) scan / photograph and (d) send back as an email attachment.

Telephone Interview w/ Candidate



Date: Sept 25, 2021

Conducted by: David Evertsen

What prompted your interest in this position?

I like the leadership in Anthem, I have done my research on the community, and I am impressed and very interested in working with this organization.

My wife and I took the time to take our family on a road trip (from Mesquite Nevada to Anthem) to visit the community and see what it was really like. I decided that if I was considering this position, I needed to be fully dedicated and that my family was completely dedicated to this change.

We went to the stores, shops and talked to people and got a good feel of the community. We absolutely loved it.

What do you know about Anthem? *Candidate referenced SEVERAL documents he had reviewed and cited information regarding budgets, infrastructure, organizational culture, marketing, etc. It was clear that he was the most informed of all of the candidates regarding the structure, function, and operation of Anthem.*

What do you see as the greatest challenge for Public Administrators generally, and City Managers / specifically? What about Community Associations?

There are two challenges I see facing all governance groups

.

1. **Aging infrastructure** - having to pay to maintain and replace it.
2. **Aging workforce that will retire soon.** With their retirement, a lot of experience and wisdom will leave the workplace.
3. **Technology.** The greatest opportunities I see are using technology to meet the demands of the future and having a governance structure nimble enough to be able to rise to the challenges of the future. Technology can be used to automate many of the processes that we do today.
4. **Cost Reduction.** Additionally, technology can be used to meet needs that we don't even foresee. Additionally, technology will help drive down the cost and time needed to maintain and replace key infrastructure; thus, saving scarce resources in the process.
5. **Slow-moving Public Agencies.** I don't see governing groups moving quickly enough to keep up with change. Too many say, "We've always done it this way and will always do it this way." This mindset creates challenges and prevents opportunities. Consequently, residents end up with a bloated, underperforming governance structure, which is the exact opposite goal of what governing groups are supposed to be doing.

What does “Public Management in the 21st Century” mean to you?

TECHNOLOGY. *I believe technology is going to play a huge role in how things go forward. I also believe that will affect how people react in their participation. It will be fun, but the challenge that I see is the government body’s ability and the mind set to change and keep up. So, the question will be how we will keep in the cusp of that.*

As I looked into the budget and funds, I have a concern about the budget for the enhancement fund and look in the future that this could be positive and also a challenge to make sure this is enough and what could wipe out most of that.

It will be important to manage the budget in a way that we will have the reserves for what expenses will come up.

What would your references say are 5 words which describe you, your skills or your attributes?

- **Visionary** – *I like to see where the organization can go. If they want a caretaker, then I’m not the guy for them. I like to see what is ahead, and see the opportunities out there and reach them together.*
- **Tech savvy** – *I enjoy using technology to make peoples lives better*
- **Even keeled** – *personality and style*
- **Collaborative** – *I like everyone involved and in the know*
- **Good sense of humor** – *having a good sense of humor is important for relieving stress in difficult situations, and to help people learn from their mistakes.*

Would your family be comfortable with relocation to Arizona? *My wife and I took the time to take our family on a road trip to visit the community and see what it was really like. I decided that if I was considering this position, I needed to be fully dedicated and that my family was completely dedicated to this change. We went to the stores, shops and talked to people and got a good feel of the community. We absolutely loved it.*

Anything else you would like to share? Do you have any questions we might answer for you?

Next steps.

Interviewer Comments: *Mr. Baker and his wife have 8 children. He has served as City Manager of Mesquite, NV, and is among the few candidates with a solid employment record of longevity. Mr. Baker impressed me when he (a) discussed his personal family trip to Anthem – demonstrated a serious commitment to this job, (b) with 8 children, commitment to being an active part of the community was clear and unambiguous, and (c) was one of few candidates who clearly had conducted a lot of personal research on Anthem its operations, and how his skill-sets transfer over from City Management to Community Association Management.*

I have no doubt that an interview with the Community Council will be a highlight for staff and Council.

Candidate Introduction & Writing Sample



Candidate Introduction / Writing Sample

What is your current/recent position/title(s)?	City Manager City of Mesquite, NV
How would you describe your current employer and work environment?	The City of Mesquite employees were hard working and dedicated. They wanted what was best for the community. As city manager, I created a collaborative and inclusive environment where employees were involved and knew that they were important. I was allowed to innovate and try new things to propel the organization forward. The political climate was difficult at times.
What are the services your current employer provides?	Finance, Human Resources, Public Works, Athletics and Leisure Services (Parks and Recreation), Development Services, Clerk, Records, Police, Fire, Courts, Legal, Grants, IT
How much influence do you have in the preparation of your annual budget, purchasing, and personnel decisions?	I served as the chief executive officer for the City of Mesquite. As such, I had total responsibility and accountability for the annual budget, annual financial review (audit); all personnel decisions, except for municipal judge and city attorney; and purchasing up to \$50,000. For any purchases greater than \$50,000, staff provided a recommendation and the Council approved or denied.
Why are you interested in becoming the Executive Director in Anthem Community, AZ?	<p>First and foremost, I love people. As a result, serving others comes naturally. I relish working with elected officials to help the community reach its full potential. I enjoy local government because you can see first-hand the results of your actions helping people.</p> <p>First, it is the current community leadership. Based on what I have been able to research online, read in the recruitment brochure and learn from employees and residents in the community, everyone seems to know their responsibilities and duties and handle them with aplomb. Having a good team is vital to success, because residents get a higher level of service and a better experience overall.</p> <p>Second, after reading the flier about the position, I feel like my skills and the skills required for this position are a good fit. I want to work in any environment that requires my very best and I feel like based on the job description, each day in Anthem would be that way. Frankly, that would be fun.</p>

	<p>Third, I like the five principles outlined in Anthem’s Livability Vision. I also agree with and have experience with the principles outlined in Anthem’s 14 guiding principles. These are things that I want for myself and my family. Consequently, it would be a joy to work on these each day.</p> <p>Fourth, I think that Anthem has all the right community infrastructure. Anthem has abundant community pride, a high quality of life, a good mix of residents, a variety of commercial and professional businesses, plentiful recreational and community opportunities and a good educational system. Having these factors already in place will help Anthem continue its upward trajectory.</p> <p>Finally, on a personal level, my family and I really like the vibe of the community and the friendly residents. As part of our due diligence for this position, my family and I visited Anthem and we absolutely loved it. It has the small town feel and atmosphere that we cherish with the proximity to more amenities in the Phoenix area. This is like the community where we currently live and its proximity to Las Vegas. We are close enough to enjoy the benefits, but not too close. As we have recounted our visit and researched more about the schools, activities and opportunities in Anthem, our interest has only grown. Given all these reasons, we feel like it is a strong match for our family.</p>
<p>What do you believe are the keys to successfully managing a large local agency and community?</p>	<p>In my opinion, there are five keys to successfully managing.</p> <p>The first key is having the right team in place. From what I can tell, Anthem has a fantastic group of dedicated employees who want to help residents. The Community Council is focused on helping both the employees and the residents. Having the right people makes it possible to do great things.</p> <p>The second key is productive communication. Making sure that the communication channels are established and open is constant effort. If there is breakdown, then action needs to be taken to rebuild it. In the absence of communication, progressing stops occurring and things stagnate or go backwards.</p> <p>Third, there must be a set of agreed upon values. If these shared values are not in place, then there is greater chance for inefficiency and misunderstanding. Shortly after becoming city manager, I arranged for the Mesquite city council to participate in a workshop where they laid out their vision, values, and strategic priorities. This was the first time that this had happened in over a decade. Having these items in place helped build trust, establish common goals, and guide future decision making.</p>

	<p>Fourth, there must be mutual respect and appreciation for each person and her or his respective role. We need each other to be successful. Additionally, each person needs to see how his or her role feeds into the shared organizational values. In other words, how does what they do impact the organization?</p> <p>Finally, there must be complete honesty in all that you do. If people cannot trust each other, then nothing will ever get done.</p>
Share two examples of where your leadership efforts improved the efficiency / effectiveness of your <i>organization</i> and its mission.	<p>1. As I mentioned earlier, when I became city manager, I engaged the city council in a strategic planning process. This was the first time that this had happened in many years.</p> <p>The council wanted to do it, they just needed someone to help lead them through the process. Having an agreed upon vision, strategic priorities and values greatly helped the organization to focus on what we really wanted. We stopped chasing every whim and started to actively pursue things that fell within the framework of the strategic priorities. From the staff's perspective, we finally knew what we were working towards and why. It was invigorating.</p> <p>2. One of the strategic priorities set by the council was to improve the fiscal health of the organization. Consequently, I led an effort to improve the budgeting process to make sure that more people were involved earlier in the budget drafting process and the budget included their strategic priorities. Second, we updated numerous financial policies and procedures. Finally, I direct finance to update their monthly financial reports to make them easier for the elected officials, the public and staff to digest.</p>
Share two ethical situations that you faced during your career. What were the issues and what was the outcome? Looking back, would you do anything differently?	<p>In 2020, the then-city attorney, who was a city employee at the time and directly reported to the city council, ran for the office of mayor while remaining city attorney. Most council members had questions about this and whether this was ethical.</p> <p>To resolve the issue, I had to obtain outside legal counsel for the City Council, so that they would be informed in their decision-making process. As the one charged with facilitating the process, I had to be completely neutral on the issue. Sadly, I had a council member, staff and community members actively recruit me to sway this issue in the direction they wanted. Despite their efforts, I did not become involved. Rather, I remained objective, abided by my professional ethics, and provided the council with the needed resources.</p>

	<p>While a difficult experience, I felt like I maintained my integrity throughout, and I would not change how I responded.</p> <p>Shortly after becoming city manager, a city department requested that one of their employees receive a greater raise than he was contractually entitled to. The employee who was supposed to receive the increase also happened to be my neighbor and our kids often played together. Candidly, I felt like this department was testing me to see what I would do as the new manager. I decided that he would receive his exact contractual raise. Nothing more, nothing less.</p> <p>Looking back, I would not change anything. I felt like and still feel like I made the right decision. I simply followed the rules in place. Despite others' efforts, it was never personal.</p>
<p>What is your experience in public speaking before community groups, the media, and elected officials?</p>	<p>I prioritize a collaborative working environment both internally and externally. In Mesquite, for many years I was the face of the city to the region as I oversaw public and government affairs and served for several years as public information officer. As public information officer (PIO), I worked with local and regional media outlets to help get the City's message out. Another part of my PIO duties was to present to other public agencies, community events, HOA meetings and public gatherings of all kinds.</p> <p>Starting in 2013, I worked with the City's lobbyists to advance the City's legislative agenda. Later, I worked with the Nevada delegation and testified before a US House of Representatives Subcommittee. I am proud of my work in getting the City's charter approved through the Nevada legislature in 2017. I find communicating with residents, businesses, and other governmental agencies to be very rewarding.</p> <p>Finally, I presented agenda items at almost every city council meeting.</p> <p>Given all these experiences, I feel very comfortable speaking publicly.</p>
<p>How would you approach improving the public's perception of the community in today's context?</p> <p>Please share an example from your experience or success story?</p>	<p>To improve the public perception of the community, you need to determine the purpose and the audience for your efforts. Is your purpose to address a specific problem or are you making a general effort to market the community? Is this because of one event or a series of events?</p>

	<p>As to the audience, whom you are trying to reach will determine how you go about messaging. In some cases, social media and the use of influencers might be the best way to get the message out. On the other hand, a more traditional media campaign using print and radio might better reach your target audience.</p> <p>I have also learned that if you want the public to have a certain perception, you must drive it. You cannot leave it to chance. Oftentimes if you are not messaging, then someone else will. When I took over as city manager, I wanted to increase the amount of information that the city was providing. I felt like others in the community were driving their own narrative and the city wasn't doing enough to message what the elected had stated as their values. Consequently, I hired a part-time staffer to focus solely on communications. She put together several media campaigns focused on different purposes and audiences. She was successful in increasing the desired messaging.</p>
<p>Have you ever experienced a situation of public outcry, angry citizenry or negative media coverage involving yourself or one of your <i>employees</i>?</p> <p>If yes, please tell us about it.</p>	<p>Several years ago, the City of Mesquite experienced a "First Amendment Audit." A First Amendment Audit is when someone with a video camera will come into a public building, start filming and ask questions. The individuals can have a variety of goals in doing the audit. For some, one of their goals is to escalate the situation and incite strong emotional reactions from the employees, which provides for great YouTube material.</p> <p>Mesquite was audited twice by the same group. I was involved in both and felt like they went well. We did some organizational training between audits, which greatly helped with the second one.</p> <p>While Mesquite did receive some negative comments on YouTube about the interactions, the feedback was generally positive because we worked to communicate and not get goaded into saying or doing something that we would later regret.</p> <p>You can search "Mesquite NV First Amendment Audit" to watch both interactions.</p>
<p>Are there any technical or administrative innovations or programs that you implemented elsewhere that you would like to bring to Anthem?</p> <p>If so, please briefly explain?</p>	<p>I do not know all of Anthem's systems and processes, so I am not going to pretend to know exactly what Anthem can do to improve.</p> <p>That said, there are some things that I have implemented elsewhere that have helped and may help Anthem too.</p> <p>First, I would implement a schedule to regularly review all of Anthem's contracts. It is good to periodically rebid contracts to make sure that residents are getting the best value for their dues.</p>

	<p>Second, I would develop an app for Anthem. In Mesquite we did this and experienced great success. Residents were able to sign up for services, report problems, pay for recreation classes, chat with a city staffer, and get news updates. It was a nice complement to the website.</p> <p>Third, I implemented a one-stop communication tool that allowed residents to chat with staff via the website, social media, or text. It was nice because residents could use their preferred method of communication on their end, while staff had one platform on the city's end. This helped increase communication with residents during COVID.</p> <p>Finally, I implemented several online processes to reduce paperwork. From changes in accounting and HR to how building plans were submitted and reviewed, we improved the customer experience and allowed them to do more without having to physically come to city hall.</p>
<p>What do you see as the greatest challenges / opportunities facing the local governments, service organizations, and Community Associations like Anthem today?</p>	<p>There are two challenges I see facing all governance groups. The first is aging infrastructure and having to pay to maintain and replace it. The second challenge is an aging workforce that will retire soon. With their retirement, a lot of experience and wisdom will leave the workplace.</p> <p>The greatest opportunities I see are using technology to meet the demands of the future and having a governance structure nimble enough to be able to rise to the challenges of the future.</p> <p>Technology can be used to automate many of the processes that we do today. Additionally, it can be used to meet needs that we don't even foresee. Additionally, technology will help drive down the cost and time needed to maintain and replace key infrastructure; thus, saving scarce resources in the process.</p> <p>I don't see governing groups moving quickly enough to keep up with change. Too many say, "We've always done it this way and will always do it this way." This mindset creates challenges and prevents opportunities. Consequently, residents end up with a bloated, underperforming governance structure, which is the exact opposite goal of what governing groups are supposed to be doing.</p>
<p>What measures / tools for measuring success of an improvement, innovation or change in your organization have you / do you use to gauge the within your organization? Why did you find these tools useful?</p>	<p>Each department within Mesquite had their own set of metrics. Generally, the data about each metric was locked within some software. (Percentage of budget spent, time to respond to call, employee training, number of building permits, etc.) Towards the end of my time in Mesquite, we started exploring software that created a dashboard where each of these key metrics would be</p>

	<p>available in real-time for people to see. On the back end, the software would talk to each of these programs and extract the needed information from each of the programs automatically. The automated dashboard was the end goal.</p> <p>Without the software, each department spent a few minutes to a few hours generating monthly reports with this key information.</p> <p>These individual reports were then emailed and manually consolidated. So, there was still measurement and accountability, but it was much more of a manual process each month.</p>
Tell us about two ways you or your agency has found to reduce costs and / or improve operations?	<p>One thing that I did to reduce costs was to replace traditional streetlights with LED lights. I did this without creating any new costs to the city. I was able to work with the local power provider and the Colorado River Commission to obtain an allocation of power for the city at a reduced monthly cost. The city saved about \$4,000 per month on our electricity bill. We then banked those savings and used them to buy new LED streetlights. The new LED streetlights costs 60% less per month to operate than the current streetlights. So, we created a system that would continue to pay for the improvements monthly, while driving down long-term operating expenses. Once all the streetlights are done, the city is going to move on to other improvements like pumps and HVAC units.</p>
What do you consider to be your greatest achievement as a Public Administrator? Your biggest failure? Why?	<p>My greatest achievement was working with the city council to establish a vision, values and strategic priorities for the city. I am proud to say that it was unanimously adopted by the council.</p> <p>For so long, the city had been rudderless, and this gave the elected, staff and residents purpose and meaning. I felt a real change in each of the groups once this rolled out. What made me happiest was when members of the community would say, "Thank you. This needed to be done. We needed it."</p> <p>From an infrastructure perspective, I am proud of my role in getting natural gas service extended to Mesquite. This was something that the community had wanted for decades but was unable to do until 2019. Also, I am very proud of getting a new interchange on Interstate 15, Exit 118, approved, paid for, and built. The long-term economic benefits the community will experience are inestimable at this point.</p> <p>My greatest failure is related to my greatest success. When COVID hit in the spring of 2020, I allowed myself to become distracted from the strategic priorities. The city had so much momentum and we lost it because we did not continue to focus on the priorities. Rather, COVID overtook our lives, and we didn't start working on</p>

	<p>the priorities again for about 10 months. In that time, we lost any ground we had previously gained.</p>
<p>What do you see as the major challenges facing local governments and Community Associations within the 10 years? Next 20 years?</p>	<p>As I mentioned earlier in the response about challenges and opportunities, being able to fund infrastructure maintenance and repair, while building new amenities is going to be the greatest challenge.</p> <p>Residents tend to want the latest and greatest amenities and are willing to move to get them. I believe that to retain residents, communities will need to maintain improvements in ideal condition and build new amenities that are interesting to the families of the future. This is difficult to do because you can only estimate what the costs will be in the future.</p>
<p>Have you found ways to reduce rising pension and infrastructure maintenance costs? If so, please tell us about your experience.</p>	<p>In Mesquite, there was not a lot that I could do about pension costs because the state retirement system was a defined benefit system that the city did not control. That said, there are some things that can be done to control costs. First, the employee can pay for a portion of their benefit. Second, you can introduce a tiered pension system that puts all new hires on a different pension program than other employees. Finally, one thing that I was never able to try, but wanted to do was to allocate a total compensation amount for each employee and then allow them to determine how it is used for each component of their individual compensation. My guess is that younger employees will want less insurance and pension benefits and more salary. In my mind, the most important question is who is ultimately responsible for the employee's retirement benefit. I believe that it should be the employee, not the employer. By placing it on the employee's shoulders, the employee is more motivated.</p> <p>On a related note, one thing I did to help control medical insurance costs was to partner with our health insurance company to develop and implement an employee wellness program. The program was designed to address both personal and professional needs. It was well received by the employees.</p> <p>To accurately control infrastructure maintenance costs, you must have a comprehensive inventory of all your assets and their lifecycle. If you don't, then you cannot properly fund their maintenance.</p> <p>Also, I learned that it truly costs to delay preventative maintenance. You must stay on top of maintenance, or it gets away from you and ends up costing you more in the long run.</p>

	<p>Conducting an annual evaluation of all your assets should be part of your PM program. Software is available to help estimate lifecycle, track inspections and project costs.</p> <p>When I left Mesquite, we were in the process of doing this for all the City's assets. Historically, the public works director simply budgeted a set amount each year and did the best he could. When I became city manager, the city had just hired a new public works director and he and I both agreed that the city needed a more sophisticated approach to managing assets.</p> <p>Two things we did to help pay for infrastructure was to explore every revenue stream possible. We leased out facilities for athletic tournaments. As part of calculating the lease rate, we examined operating and replacement costs.</p> <p>revenue streams.</p>
<p>Tell us more about your <i>management style?</i></p>	<p>I am a leader who is committed to his employees. I make sure that they have the resources and training that they need to perform their responsibilities. I am sincere, collaborative and even keeled in my approach.</p> <p>When it comes to leading, I have three pillars that I follow.</p> <p>First, get stuff done. Employers want and need results. Consequently, employees need to accomplish things. There is a great feeling of satisfaction that accompanies finishing something.</p> <p>My second pillar is to be honest. While a simple statement, many struggle with this.</p> <p>On a most basic level, if people don't believe the words coming out of your mouth, then you are done for. In a previous life, I had a coworker who always lied. Consequently, no one took him seriously and people would just stop listening when he talked. If people did engage, it was often to point out errors in his statements.</p> <p>Another facet of honesty is to only promise what you can deliver. Be honest about what you can and cannot do about both work product and timing. Overpromising will always come back to haunt you. We have all missed deadlines or underperformed and felt the sting associated with that.</p> <p>A third part of being honest is giving credit to others. Far too often, others claim credit for things that they had little to do with and downplay the role of team members in accomplishing the work. Early in my career, I had a boss who willingly shared the spotlight with me on a project. I knew that my contribution was</p>

	<p>not amazing, but it was nice to be recognized by my superior for my efforts.</p> <p>My third and final pillar is part of the solution. It is easy to criticize someone else's work. Mistakes are part of the process and that's okay. It's also safe to stay on the sidelines and not get involved in something. True leadership leads out and finds answers to challenges.</p>
Give us six adjectives or phrases you would use to describe yourself	<p>Even keeled Sincere Collaborative Visionary Tech savvy I love a good laugh</p>
Are you comfortable with your current salary? If not, why not? <i>(Creative answers welcome)</i>	<p>I am comfortable with my previous salary and benefits.</p> <p>One thing that bothered me was that there was not a pay for performance system in place. Effort is not rewarded. When I asked about doing something like this, I was told that extra effort was just part of my job, and I should not be paid more to simply do my job. Frankly, this creates a disincentive to innovate and seek for higher goals because the reward is not there.</p>
What are your salary expectations if you are hired by us?	<p>I would like to agree upon a total compensation amount and then divide it out between salary and benefits. I would also like to have performance incentives in place that motivate me and encourage me to motivate the team.</p>
Is there anything else about yourself you would like to tell us that would be helpful in evaluating you for this position?	<p>This past week, my family and I visited Anthem. We drove the streets, visited the neighborhoods, talked with residents and employees, and explored all that Anthem has to offer. We loved it. Additionally, I have talked to several Pulte employees about Anthem to understand their perspective as well. Everyone had positive things to say.</p> <p>Also, I have a strong background in community development. This could be beneficial in several ways.</p> <p>First, I have written, reviewed, and enforced design guidelines and community standards. That said, I enjoy working with people helping them see how they can accomplish what they want within the guidelines. There are times you have to say no, but you do not have to be adversaries.</p>

Second, I am familiar with engineering and architectural drawings and construction processes including funding and oversight.

Finally, I have also done economic development. One idea I had would be to conduct a commercial leakage study to see what businesses are missing from Anthem and then work with the commercial property owners to recruit these businesses to Anthem to vacant commercial units. This would create a better chance of success for the business, fill vacant units and address real needs.

Background Investigation Part I:
Internet, News & Social Media





MUNICIPAL SOLUTIONS®
EFFICIENCY. TECHNOLOGY. SAFETY.

Candidate Release Form

Applicant's Authority to Conduct a Background Investigation and to Release Information

To Whom It May Concern:

I hereby agree to submit to a background investigation by Municipal Solutions for the purpose of evaluating me for employment with future clients. I understand that such an investigation will include contacts with individuals and institutions relating to my professional and personal life. I understand that I can be rejected for this employment or terminated in the future based on the results of this investigation. I further understand that this investigation is part of the hiring process and that until the investigation is complete, any and all offers of employment are conditional upon its outcome. I further understand that if I am employed, it will be pursuant to an employment agreement or job offer consistent with the Anthem's hiring practices.

I therefore authorize Municipal Solutions to provide future clients, or its representatives, any and all information (oral or written) you may have pertaining to my fitness for employment. Such information may include, but is not limited to, the following:

Personal Qualifications
Employment History
Military Records
Education

Financial History including credit records
Criminal and Civil Records
Driving/Motor Vehicle Records
News Archives & Social Media

Print Name: Aaron R Baker

Signature: A Baker

Date: 10/4/2021

Other or Prior Names (maiden name, nickname "Chuck", initial)

*Social Security No: 529-77-0291

Birth Date: 4/25/1981

*Driver's License No. 1902862116

State: Nevada

Address: **Current: 324 Cora Circle Mesquite, NV 89027**

States & Counties (past 10 years):

Return a signed and scanned PDF to **Heather, Kaylynne & Kathryn** at: AnthemExecutive@municipalsolutions.org

*****PRIVACY IS VERY IMPORTANT TO US.** If you prefer, please call us by phone to provide your Social Security #. You can also scan and save as a PDF, and password protect it. Whichever you prefer.

Please (a) print, (b) sign with your *actual signature*, (c) scan / photograph and (d) send back as an email attachment.

Internet, News & Social Media Research

Social Media:

Facebook: Personal Profile. No recent posts. 282 Friends. Not very active on this Platform.

Link: <https://www.facebook.com/aaron.baker.50552>

Local Mesquite News Page.

Link: <https://www.facebook.com/mesquitelocal/>

Twitter: No personal FB page reported. None found.

Instagram: No personal Instagram page reported. None found.

LinkedIn: 91 Connections, Lists multiple job positions in Mesquite, Nevada

Link: <https://www.linkedin.com/in/aaron-baker-647b561ab/>

Internet / News Articles:

Minutes: 10 Feb 2011 – “Assembly Committee: Government Affairs”

Summary: An Assembly committee in which Government affairs are discussed, the Director of which is Aaron Baker.

Link: <https://www.leg.state.nv.us/Session/76th2011/Exhibits/Assembly/GA/AGA126C.pdf>

Minutes: 3 Oct 2016 – “City Charter Committee”

Summary: Minutes of a scheduled meeting of the City Charter Committee was held on Monday October 3, 2016 at 3:30 PM. Committee members in attendance were Karen Beardsley, George Gault, Mike Benham and Ex-Officio Aaron Baker Also present were Mayor Allan S. Litman; City Manager, Andy Barton; City Attorney Robert Sweetin; City Clerk, Tracy Beck and

Ex-Officio Aaron Baker called the meeting to order and excused David Ballweg, Committee member.

Link: https://mesquitenv.granicus.com/MinutesViewer.php?view_id=1&clip_id=77&doc_id=b5229ac4-b1af-11e6-8893-00219ba2f017

Minutes: 13 Feb 2018 – “Mesquite Regular City Council Meeting”

Summary: Minutes of a scheduled meeting of the City Council held Tuesday, February 13, 2018 at 5:00

PM at City Hall. In attendance were Mayor Allan S. Litman; Council members David Ballweg, Rich Green, George Rapson, W. Geno Withelder and Brian Wursten. Also in attendance were City Manager Andy Barton, Assistant to the City Manager Aaron Baker; City Attorney Robert Sweetin,

Finance Director Dave Empey, Public Works Director Bill Tanner, City Clerk Tracy E. Beck, other City Staff and approximately 60 citizens.

Link: <http://mesquiteweekly.com/wp-content/uploads/2018/09/Mesquite-City-Council-Meeting-Minutes-February-13-2018.pdf>

Article: 29 Aug 2019 – “Baker named new city manager” Mesquite Local News

Summary: Long-time city employee Aaron Baker was selected as the new city manager by Mesquite’s City Council at its meeting Tuesday, Aug. 27.

Link: <https://mesquitelocalnews.com/2019/08/29/baker-named-new-city-manager/>

Link2: <https://nevada-today.com/mesquite-nv-mayor-takes-role-of-greek-despot-in-city-manager-appointment/>

Link3: <https://www.facebook.com/mesquitelocal/posts/2544721658912765>

Article: 3 Sep 2019 – “Aaron Baker, New City Manager - Sworn in 9/3/2019”

Summary: Aaron Baker was appointed City Manager for the City of Mesquite at the August 27, 2019 City Council Meeting. He was sworn in today, by Tracy Beck, City Clerk, after the Technical Review Meeting.

Link: <https://www.mesquitenv.gov/news/aaron-baker-new-city-manager-sworn-in-9-3-2019>

Membership: 2009-2019 – “2009-2019 Salaries for Mesquite” Transparent Nevada

Summary: Aaron Baker’s profile on website that demonstrates Aaron Baker and other public servants annual salaries.

Link: <https://transparentnevada.com/salaries/mesquite/?s=name>

Article: 19 Mar 2020 – “City expands communication channels” Mesquite Local News

Summary: The City of Mesquite has expanded its Emergency Operations Center (EOC) under an escalation from Level 3 to Level 2 during the current COVID-19 crisis, also known as Corona virus.

Link: <https://mesquitelocalnews.com/2020/03/19/city-expands-communication-channels/>

Minutes: 12 May 2020 – “City Council Meeting Agenda Item Report”

Summary: Consideration for approval of Resolution #1019, a resolution of the City of Mesquite, Nevada creating the COVID-19 Special Revenue Fund.

Link: [https://legistarweb-](https://legistarweb-production.s3.amazonaws.com/uploads/attachment/pdf/585520/56a3f09c1c2c32d7a8ba8b1517b083480.pdf)

[production.s3.amazonaws.com/uploads/attachment/pdf/585520/56a3f09c1c2c32d7a8ba8b1517b083480.pdf](https://legistarweb-production.s3.amazonaws.com/uploads/attachment/pdf/585520/56a3f09c1c2c32d7a8ba8b1517b083480.pdf)

Minutes: 11 Aug 2020 – “City Council Meeting Agenda Item Report”

Summary: Minutes discussing the presentation regarding a Public Comment, Discussion and Possible Action.

Link: [https://legistarweb-](https://legistarweb-production.s3.amazonaws.com/uploads/attachment/pdf/659732/dd5645187180ea8a0dc95d62b8b47fe70.pdf)

[production.s3.amazonaws.com/uploads/attachment/pdf/659732/dd5645187180ea8a0dc95d62b8b47fe70.pdf](https://legistarweb-production.s3.amazonaws.com/uploads/attachment/pdf/659732/dd5645187180ea8a0dc95d62b8b47fe70.pdf)

Article: 29 Sep 2020 – “BREAKING NEWS – Mesquite Mayor Al Litman tests positive for COVID-19” Mesquite Citizen Journal

Summary: City Manager Aaron Baker confirmed this morning, Sep. 29, that Mesquite Mayor Al Litman has tested positive for the COVID-19 virus.

Mayor Litman was unavailable for comments or further questions about his health. Baker said Mayor Litman received the positive test results on Sunday after receiving a ‘rapid’ test. Baker also said that he advised all city department heads to notify their staff that COVID-19 testing is available, and everyone is encouraged to get tested. He also advised city council members of the mayor’s positive test results and encouraged them to get tested. Southern Nevada Health District will oversee any contact tracing that may be needed. Those who have met the mayor in the last two weeks are encouraged to get tested for the COVID-19 virus. The Mesquite Citizen Journal will continue following this story and update readers as information becomes available.

Link: https://mesquitecitizenjournal.com/breaking-news-mesquite-mayor-al-litman-tests-positive-for-covid-19/?fbclid=IwAR28MqFLsr_Brhi69QTy-zhkGXYiPbn1R5QBmUIglrA5mB6u-Dz6bxHBlyk

Blog: 7 Nov 2020 – “No, I’m Not Quitting (Yet)! Here’s Why...” Annie Gram

Summary: City Council member and opponent in the candidacy for the Mesquite city manager position, Annie Black, recounts exchanges with Aaron Baker during ballot counting.

Link: <https://electannieblack.com/no-im-not-quitting-yet-heres-why/>

Article+ Video: 28 Jan 2021 – “CITY MANAGER TAKES ACTION!! MESQUITE NEVADA – First Amendment Audit – Amagansett Press”

Summary: YouTuber and his son conduct a second First Amendment audit at the Mesquite NV City Hall prompting training and education for public workers on how to deal with citizens exercising their First Amendment rights.

Link1: <https://www.phillyfinest369.com/city-manager-takes-action-mesquite-nevada-first-amendment-audit-amagansett-press/>

Link2: <https://www.youtube.com/watch?v=fRKukGmGo-I>

Article: 12 May 2021 – “Baker resigns as City Manager, effective immediately”

Summary: Mesquite City Manager unexpectedly resigns effective immediately. Mayor Al Litman fills the position until an Interim City Manager is appointed.

Link: <https://mvprogress.com/2021/05/12/baker-resigns-as-city-manager-effective-immediately/>

Article: 13 May 2021 – “Police union wins, City Manager resigns – News – Op/Ed”

Summary: Mesquite City Manager Aaron Baker submitted his resignation effective immediately on Wednesday afternoon, May 12, following heavy criticism from Police Union.

Link: <https://mesquitecitizenjournal.com/police-union-wins-city-manager-resigns-news-op-ed/>

Baker got crosswise with the Police Union on 2 issues: (1) concessions in the existing Police Department Union Agreement requested by the City Council upset the Police Department (they didn't feel they needed to make any concessions; (2) Police Union supported the Mayor's election and used information obtained during working hours, from the Police Department Offices, computers, government resources and obtained information to slander the Mayor's challenger and sent it to every resident in the City.

**Article: 20 May 2021 – “City Council Appoints Interim City Manager”
Mesquite City website**

Summary: In a special meeting on May 18th, the city council appointed former City Manager Andy Barton as interim city manager after Aaron Baker tendered his resignation on 5/12/21.

Link: <https://www.mesquitenv.gov/news/city-council-appoints-interim-city-manager>

Article: 27 May 2021 – “‘There’s a lot of scared people in this town!’ Tensions run high in Mesquite” Las Vegas Review-Journal

Summary: A tumultuous 2020 mayoral campaign sparked growing tensions in Mesquite, resulting in city officials being forced out of office, the local online newspaper stopping operations and journalists losing their jobs.

Link: <https://www.reviewjournal.com/local/local-nevada/theres-a-lot-of-scared-people-in-this-town-tensions-run-high-in-mesquite-2364774/>

Article: 11 Aug 2021 – “In the race for mayor in this small town, a big secret is exposed” Las Vegas Review-Journal

Summary: After a young woman shares an intimate story from her past with the Mesquite City Council, her private story is spread throughout the

city. Such case happened while Aaron Baker was City Manager of Mesquite.

Link: <https://www.reviewjournal.com/local/local-nevada/in-the-race-for-mayor-in-a-small-nevada-town-a-big-secret-is-exposed-2416623/>

Membership:

Present – “City Of Mesquite” Businessfacilities.com

Summary: Aaron Baker’s profile as City Manager on website that provides professional contact information.

Link: <https://businessfacilities.com/site-selection-directory/listing/city-of-mesquite/>

Membership:

Present – “Aaron Baker City Manager at Mesquite Magazine” Zoominfo.com

Summary: Aaron Baker’s profile on a website that provides professional and contact information.

Link: <https://www.zoominfo.com/p/Aaron-Baker/217267381>

Analyst Comments: *The candidate has spent most of his career working his way up the different positions in Mesquite’s local government before making it to the position of City Manager. He demonstrates to be very precise and professional. He presents himself well shows he can be proactive when there is need for action.*

Background Investigation Part II:
Criminal / Civil, Education & Employment Verification



20 total inquiries, 2 pending**Names searched: Aaron Baker, Aaron R. Baker****Criminal Records Checks****Nationwide Criminal Records Search:****Verified***No offenses found***County Criminal Search:***Mesquite (Clark County), NV***Verified***Provo (Utah County), UT***Verified****Statewide Criminal:***Nevada***Verified***Utah***Verified****Civil Records Checks****Federal Civil Search***Nevada***Verified***Utah***Verified****County Civil Search:***Clark County, NV***Verified***Utah County, UT***Pending****3-year Motor Vehicle****Verified****NV DL #1902862116***No incidents to report**License first issued in Nevada, 0 violations, 0 convictions, 0 failure to appear and 0 accidents.***NCDL STATUS AS REPORTED TO CDLIS: LIC****EXPIRATION DATES IN THIS DOCUMENT MAY HAVE BEEN EXTENDED PURSUANT TO EXECUTIVE OR LEGISLATIVE ACTION OF THE ISSUING JURISDICTION RELATED TO COVID-19. PLEASE CONSULT WITH THE JURISDICTION FOR FURTHER DETAILS.****Bankruptcy****Verified***Based on the information provided to us by the client and/or applicant a search was conducted in the state of record for a minimum of seven years and no past or pending litigation was found in the jurisdiction of this court as of this date.*

Employment Verification

City Manager – City of Mesquite, NV <i>Verified online</i>	Verified
Assist. City Manager – City of Mesquite, NV <i>Verified online</i>	Verified
City Liaison Officer – City of Mesquite, NV <i>Verified online</i>	Verified
Interim Econ. Dev. Dir. – City of Mesquite, NV <i>Verified online</i>	Verified
Assist. Planner – City of Mesquite, NV <i>Verified online</i>	Verified
Assistant Planner GIS – City of Mesquite, NV <i>Verified online</i>	Verified
Engineering Intern – City of Orem, UT	Pending

Education Verification

Master of Public Administration <i>University of Nevada</i> <i>Confirmed by National Student Clearing house</i>	Verified
Bachelor of Geography, Urban, Rural, Environment, Planning <i>Brigham Young University</i> <i>Confirmed by National Student Clearing House</i>	Verified

**Based on the information provided to us by the client and/or applicant a search was conducted in the jurisdiction requested and no reportable records were found as of this date.*

*** Based on the information provided to us by the client and/or applicant a search was conducted in the state of record for a minimum of seven years and no past or pending litigation was found in the jurisdiction of this court as of this date.*

Reference Interviews





MUNICIPAL SOLUTIONS®
EFFICIENCY. TECHNOLOGY. SAFETY.

Candidate Reference Checklist

Anthem Executive Director
Finalist candidates

Instructions

Please provide names and telephone numbers for the following individuals. *Due to the difficulty of contacting people during the business day, a personal or mobile phone #s would be helpful.* Substitutions should be kept to a minimum. Name, Title and Mobile Phones please.

Explanation (please read carefully): We are not necessarily asking for ‘traditional’ references, but rather to speak with people who can talk about the current / former working relationship they had with you. It’s a less formal, but (we believe) the result is a more honest way to get a sense of what it is like to work with you in 4-5 questions. We generally don’t name the City or the position we are considering you for, just that we are considering you for a position. We realize that contacting a current employer may be problematic, so YES, we can do this as a condition for an employment offer. I hope this provides some clarity on our process. If you have any questions or desired substitutions, please let me know. ~Dave

1. Two elected officials for the you currently work for who would have familiarity with your work in a *Senior Management position*. *(may be omitted and substituted by request)*

Brian Wursten Mesquite City Council Member 702.376.6087

George Rapson Former City Council Member 702.813.1450

2. Two elected officials for the agency whom you have worked previously, who would be familiar with your work in a *Senior Management position*.

See above references

3. Your current direct Supervisor. *(may be omitted and substituted by request)*

Andy Barton Former City Manager 702.423.1846
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4. A Mayor or City Manager and two prior Mayors or City Managers who know of your work in a *Senior Management position*. *For private-sector position substitute with former Senior Executive.*

See above references		
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5. One HR Director for an agency where you worked in a *Senior Management position*.

Gina Mendez Mesquite HR Director 702.468.1475

6. Two members of the media who were familiar with you and your work in the agency you worked in as *City Manager or other Senior Management position*.

Barbara Ellestad Mesquite Citizen Journal 702.250.3185	Vernon Robison Moapa Valley Progress 702.672.7608
--	---

7. Two colleagues or former colleagues from any city, town or agency who knew your work as *City Manager or other Senior Management position*.

Kevin Brown Virgin Valley Water District GM 702.533.1892	Andre Carrier Eureka Casino COO 702.813.1383
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8. Two subordinate employees who report(ed) directly to you as *City Manager or other Senior Management position*.

Travis Anderson Public Works Director 702.728.0576	Jayson Andrus Fire Chief 702.378.1024
--	---

Return ASAP in MS Word format to:

Heather, KayLynne or Kathryn at: AnthemExecutive@municipalsolutions.org

Call us at (888) 545-7333 if you have any questions or suggestions.

INTERVIEW #1:

Date: **October 6, 2021**

Candidate Name: **Aaron Baker**

Reference Name: **Kevin Brown**

Interviewer Name: **Amanda Peterson**

Reference Title: **Virgin Valley Water District Mgr.**

1. **What has been the working relationship you've had with this candidate? For about how long have you known him / her?**

I have known Aaron for 8 years. We provide water to the city and of course Mesquite is very interested in what we do. We would speak frequently, sharing resources and coordinating projects related to growth.

2. **Can you share with me 4-5 words that best describe him/her?**

Fair, open-minded, honest, good at the art of politics, good communicator

3. **What do you consider to be his/her greatest achievement, or management strength? Are there any areas for improvement?**

Aaron's management strength is as a negotiator. He and the water district negotiated on a couple pieces of property. We have a high growth rate, so the Water District has to build new wells and treatment plants. We had to negotiate with Aaron on city-owned properties.

Based on what I've heard; he did a very good job negotiating union contracts.

He doesn't have a lot of weaknesses. He trusts people. That can bite you if you trust someone too much. But I think it's good to trust someone until you have a reason not to.

4. **Describe the candidate's ability to gain trust in others, or the community while developing an organization into a "21st Century public agency".**

Yes, he was trusted because he was forthright on the things he had to do and the challenges he had to deal with. He spoke truth, said what needed to be said, instead of what people wanted to necessarily hear.

5. **Describe a crisis where s/he was involved and how they handled it?**

Aaron and I didn't interact on crisis situations. The closest I can speak to is when COVID first broke out, I saw Aaron dealing with the emergency operations center and sharing what the city was doing to protect residents. City messaging was excellent.

- 6. If you were in a hiring position today, would you hire him/her as City Manager? Why or why not?**

Yes, because he's someone you can trust to get a job done without babysitting. He is responsive to the city council, to the media, and to residents. There's the public side of things, but Aaron is very good at the behind the scenes dealing with legislators, county commissioners, business leaders, and other government agencies. Aaron was very good at connecting with legislators when they got the city charter done a few years ago.

- 7. If the City were to hire them, is there anything in their past that could become an embarrassment if it became public?**

No, he's a stand-up guy.

- 8. Is there anything else that you would like to add?**

He's an asset to the community and has the skill set to benefit the residents.

Interviewer Assessment: *Great personal skills that allow him to get things done.*

INTERVIEW #2:

Date: **October 6, 2021**

Candidate Name: **Aaron Baker**
Interviewer Name: **Amanda Peterson**

Reference Name: **Gina Mendez**
Reference Title: **Director of HR, City of Mesquite**

1. What has been the working relationship you've had with this candidate? For about how long have you known him / her?

He worked at Mesquite for years. First, he was a colleague, then a boss. I've known him for 13 years

2. Can you share with me 4-5 words that best describe him/her?

diligent, reliable, took limited time off, long work hours, integrity, honest, great work ethic

3. What do you consider to be his/her greatest achievement, or management strength? Are there any areas for improvement?

When he took over as city manager, he had a great vision for the budget. It had been messy and disorganized before. He spent time with the Finance Director, and they purchased a module so that we could do the budget more efficiently. His budget skills in finance are a super strength.

People also talked about how good he was with economic development.

We all have areas for improvement. Aaron's career grew in the city, and we were used to seeing him as "Aaron", not as the city manager. But he grew into that. I think he sometimes second guessed himself because of that background.

4. Describe the candidate's ability to gain trust in others, or the community while developing an organization into a "21st Century public agency".

He was trusted because the most important thing he worked on was the budget. He said, "I'm going to work to get what you want", but he never made any promises. He was very transparent about what we could do. I think everyone came out of budget meetings feeling like they had been helped.

5. Describe a crisis where s/he was involved and how they handled it?

When he started his career as a city manager, he had a vision for Mesquite. He wanted to meet with each department, visit each work site etc. Usually, only people at City Hall see the city manager. But he was interrupted by COVID. With so many things closing and no knowledge of what city taxes we would get back, we had to furlough many full-time employees. We probably laid off 40-60 employees, most of our part-timers. That was difficult, but we had budget constraints because of the unknown. He had to make the difficult decisions,

closing open positions. He had to put his foot down with departments. At minimum we have to be at an 8 so that the state didn't take over.

6. If you were in a hiring position today, would you hire him/her as City Manager? Why or why not?

Yes, because he had really good ideas and a vision of how he could make changes.

He was never going to give me a full-time employee because we're a small city and he's tough on the budget, but he was very supportive of diversity and inclusion. He has an open mind when it comes to economic development. He looks at employees as an asset and valued them. He was willing to mentor employees so that they could become more effective.

7. If the City were to hire them, is there anything in their past that could become an embarrassment if it became public?

Not at all. He's a churchgoer and a religious man, and he has 8 kids! He's very ethical and careful when dealing with people.

8. Is there anything else that you would like to add?

His math skills really helped with union negotiations.

***Interviewer Assessment:** Willing to do the hard things to keep a city solvent. Respected by coworkers.*

INTERVIEW #3:

Date: **October 7, 2021**

Candidate Name: **Aaron Baker**
Interviewer Name: **Amanda Peterson**

Reference Name: **Andre Carrier**
Reference Title: **COO of Eureka Casino**

1. What has been the working relationship you've had with this candidate? For about how long have you known him / her?

We've always worked together as partners to keep the lines of communication open between the casino and the city of Mesquite; I've known him about a decade.

2. Can you share with me 4-5 words that best describe him/her?

Responsible, responsive, effective, strategic, broad thinker, good to work with

3. What do you consider to be his/her greatest achievement, or management strength? Are there any areas for improvement?

Aaron's greatest achievement is getting the community to recognize the importance of managing growth effectively. He developed some pathways for responsible growth. And he's also explored the risks of not growing responsibly. Change is inevitable, and he's invested in managing that.

I don't know that I'm close enough to him to give feedback about any areas of improvement. It's tough to be a city manager and have bosses that are elected officials. I don't know if I ever appreciated how difficult that must be, to manage that three dimensionally.

4. Describe the candidate's ability to gain trust in others, or the community while developing an organization into a "21st Century public agency".

Yes, he's trusted because he's built experience over time. He can manage complex projects; we worked on a tax credit deal that was very complicated.

5. Describe a crisis where s/he was involved and how they handled it?

COVID-19 was a crisis and we partnered together to create a vaccination center. We were able to get people vaccinated quickly and efficiently. We would have liked to vaccinate more people, but we couldn't force anyone.

6. If you were in a hiring position today, would you hire him/her as City Manager? Why or why not?

Yes, I would hire him. I'm a big fan of people that are self-reflective and understand the value of research and finding experts, taking inputs, and then also making decisions. As a city manager, you have to hold yourself to a timeline. The timelines can become decoupled from business expectations and normality's, as

well as from human expectations and these timelines can start to live in an alternate timeline. Aaron was very good at trying to bridge the gap between a business timeline and a bureaucratic construct, bringing those together.

7. **If the City were to hire them, is there anything in their past that could become an embarrassment if it became public?**

No.

8. **Is there anything else that you would like to add?**

Whichever community gets him is fortunate.

Interviewer Assessment: *Forward-thinking and creative.*

INTERVIEW #4:

Date: **October 6, 2021**

Candidate Name: **Aaron Baker**

Reference Name: **Andy Barton**

Interviewer Name: **Amanda Peterson**

Reference Title: **former Mesquite NV
city manager**

- 1. What has been the working relationship you've had with this candidate? For about how long have you known him / her?**

I was the city manager of Mesquite from 2012-2019. Aaron worked for me directly during those years. He had a minor title, but I quickly promoted him to Assistant to the City Manager.

- 2. Can you share with me 4-5 words that best describe him/her?**

Honest, industrious, diligent, skilled, out-of-the-box financial thinker

- 3. What do you consider to be his/her greatest achievement, or management strength? Are there any areas for improvement?**

He was the municipal expert for a regional redevelopment plan. Certain zones in the city were qualified to apply for redevelopment funds, with a 50% match with the city. A lot of commercial building owners took advantage of this program. It was over a dozen transactions with the agency, and he was particularly good with these complex land deals.

At one point I assigned him to manage our senior center. He had 6 employees there, in addition to managing our museum with its handful of employees. As a supervisor, he would come in early to spend time with subordinate employees. At the senior center he would do things he wasn't required: deliver Meals on Wheels, help cook, attend celebratory events. He wasn't afraid to get his hands dirty.

I wouldn't say that he has anything to improve on. He has great work hygiene and is very good with the budget.

- 4. Describe the candidate's ability to gain trust in others, or the community while developing an organization into a "21st Century public agency".**

Everyone likes Aaron. He's a nice guy, even-tempered, and is able to get along with others during stressful conditions.

- 5. Describe a crisis where s/he was involved and how they handled it?**

Our power is sent to us from 80 miles south of us, and when that line goes down there is no redundancy. We occasionally have power failures that can last 10-12 hours. This is particularly difficult because we have a hospital and a large senior community. It gets really hot down here and many residents need oxygen. He

coordinated a plan with the power district, the hospital, the fire department, and the police department (because traffic lights go down) to ensure we aren't endangering our citizens.

I retired in 2019 and he was hired; during Covid he mounted a huge effort, coordinating with the casinos, to get people vaccinated. Not as many people are vaccinated in our area as I would like, but it wasn't for lack of trying.

- 6. If you were in a hiring position today, would you hire him/her as City Manager? Why or why not?**

Absolutely, I recommended him to the Council as my successor. They had no reservations in hiring him because they were familiar with his work.

- 7. If the City were to hire them, is there anything in their past that could become an embarrassment if it became public?**

Not to my knowledge, not at all.

- 8. Is there anything else that you would like to add?**

The ability to write well is rare. I had 160 employees, and only a half dozen who could write well. Aaron wrote extremely well, spoke well, presented well. He gave countless presentations to the City Council.

***Interviewer Assessment:** Hard-worker and takes his responsibility to the community seriously. Excellent communicator.*

WINCHENDON MASSACHUSETTS



TOWN MANAGER

POPULATION 11,000

Larry's Drive by Pictures

Photo by Larry Richardson

IDEAL CANDIDATE

- Collaborative
- Strategic Planner
- Small-town savvy
- Strong Financial Manager
- Community-based Problem Solver
- Exceptional Leader & Team-builder
- Economic Developer and Redeveloper
- Excellence in interpersonal communication
- Highly-skilled professional in local government
- Inspire creative solutions that maximize results

ABOUT WINCHENDON

Small, wonderful, tight-knit rural New England community with a 5-member Board of Selectmen with a strong Town Manager form of government, \$32,700,000 operating budget, 13 direct-reports, 9 Department Heads* and 240 FTEs supporting 20 boards / committees and 11,000 residents.



"The Heart of it All"

RESUME & LETTER OF INTEREST BY SEPTEMBER 24TH

Pre-Modern - This area of Massachusetts was occupied by the **Pennacook Indians**, then by the **Nipnet tribe**.

In 1735, the House of Representatives made the grant of "**Ipswich Canada**" or what is now Winchendon in answer to a petition from men who had participated in the expeditions against Canada in 1690 and in compensation for their sufferings and hardship but it was not until 1752 that the first settlers set up permanent residence in the Township. A constant fear of Indians pervaded the



Pennacook Indians

community and several "block" houses were built, but despite these fears, no blood was shed.

In 1764, the residents petitioned the court to incorporate and asked for the name *Epesberry*, but he petition came back with the name *Winchendon*, after the England estate Governor Francis Bernard had an heir's interest in. After the incorporation in 1764, the people set the government of the town in operation. With around 200 local residents, the voice of the people ruled the details of community life. The early village centered around what is now referred to as **Old Center** for the first 50 years of the Town's existence.

Thanks to its vicinity to **Millers River**, and the possibility to use water as a source of power, the Town expanded rapidly and by 1800, there were about twenty 2-story houses in Winchendon. The craftsmen of the era could fashion handsome buildings whose sturdiness and charm have survived the decades and given the town a historical richness.



Abandoned Textile Mill

Modern - In the 20th century, with the abundance of water power, industry in Winchendon flourished with the working of wood into many forms and building the machines to work the wood. The first of these enterprises was the manufacturer of shingles, which were made in such quantities in the late 1700's that neighboring people called this settlement "**Shingletown**." Next came wooden pails, tubs, clothespins, bobbins and a variety of other small wooden-ware products. These were expanded to include furniture and so many toys that later, at the turn of the 20th century, Winchendon was home to the **Converse Toy Company** and became famously known as "*Toy Town*." The local textile industry of the **White Brother's Mill** became of equal importance to the town's prosperity.



Historic Colonial-style Homes





Winchendon Winds



By the end of the 20th century, most manufacturing had moved south or out of the country, but the Yankee 'hard work ethic' and ingenuity still flourishes locally.

Today, the Town encompasses 44 square miles of mill villages, forests, farm fields, and colonial-style homes, but is also expanding its green-energy footprint with 1000s of acres of solar energy production. Coordination among residents, youth, and local institutions like [Heal Winchendon](#) are active in positively addressing the root causes of poverty and to create **hope, empowerment, access and togetherness** to contribute to long-lasting local change. To improve the health, equity, and quality of life for all Winchendon residents, [Destination Winchendon Committee](#) is working to improve underutilized buildings and housing and rehabilitate them.

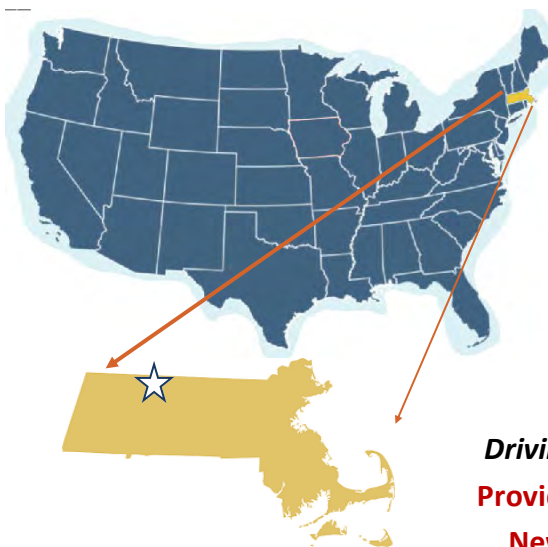
Winchendon's affordability, practicality and unmatched rural quality of life make Winchendon a desirable place to live and work.



The crown of Winchendon - is her people.



Geography



Winchendon is located just minutes from the New Hampshire state line-in North Central Massachusetts.

The Town is surrounded by green, water and parks by **Whitney Pond**, **The Millers River**, **Lake Dennison**, **Lake Monomonic**, the **Birch Hill Wildlife Management Area** and the **Winchendon State Forest** and **Otter River State Forest**.



Driving Distances (minutes/hours): **Worcester, MA** (1hr.) **Boston, MA** (1.5 hrs.) **Providence, RI** (1.25 hrs.) **Cape Cod, MA** (2.5 hrs.) **White Mountains, NH** (3 hrs.) **New York, NY** (4 hrs.) **Philadelphia, PA** (5.2 hrs.) **Washington, D.C.** (7.5 hrs.)

DEMOGRAPHICS

TRANSPORT

Regional & International Airport

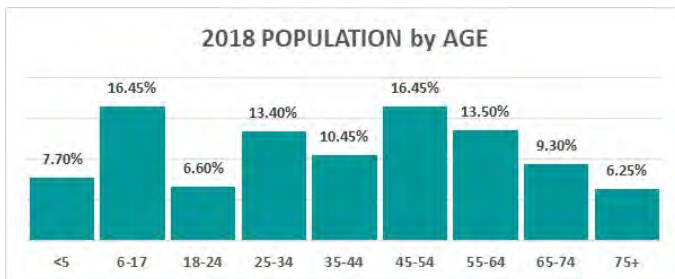
Winchendon is located near three airports: **Worcester Regional** (30 mi) served by *American, Delta, JetBlue and Ross Rectrix*; **Manchester-Boston Regional NH** (54 mi) served by *American, Avelo, Southwest, Spirit and United*, and **Boston Logan International** (58 mi) served by *Air Canada, Air France, American, British, Delta, Emirates* and others.

POPULATION

2020 census shows 10,364 residents with a slight increase of 0.2% in 2022 reaching 10,385. Age distribution illustrates higher percentages in the young and older professional and young families age groups. Low population density is ideal for a raising a family in a peaceful area.

AGE DISTRIBUTION

The median age in Winchendon in 2020 was 39.2 years. The largest segments of the local population are ages 5-17 (16.45% of residents) and 45-54 (16.45% of residents), ages 25-34 (13.4% of residents), ages 35-44 (10.45% of residents), and ages 55-64 (13.5% of residents).



Source: www.USCensus.gov

COST OF LIVING & PROPERTY

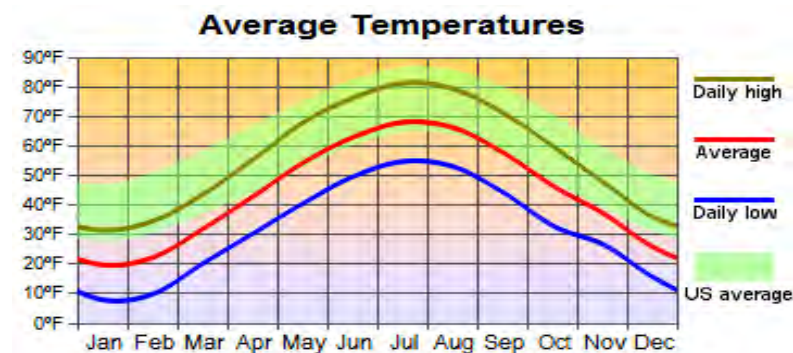
Winchendon's cost of living index of **102.6** of the US average of 100. Winchendon has some of the most affordable real estate in Massachusetts. In August 2023, the **Median Home Price in Winchendon** is was **172,000** - **72% lower than the State avg. of \$616,450**. Rents range from \$750 for a 1-BR apartment to \$1400 for a 2-BR with a Median Rent of \$624. **Homeowner vacancy** in 2022 was 4%.



"a community with heart and soul"

ETHNIC COMPOSITION & EDUCATION

In 2020, Winchendon's ethnicity composition is 90% White, 4% Hispanic / Latino, 4% Asian, 1% Black / African American and 1% mixed. 31% of the residents attained a higher degree (1.3% Doctorate and Professional, 5.2% Master's, 11.7% Bachelor's and 12.8% Associate's), 57% High School Diploma / some college, and 12% no High School diploma degree.



CLIMATE

Winchendon's summers are warm while winters are often freezing and snowy. It is usually partly cloudy all year round. Temperatures are typically varied, ranging from 13°F to 80°F, rarely going below -3°F or above 87°F. The most pleasant months are between May and October, which is also the wettest season of the year. The drier months are usually between August and May of the following year.



Winchendon Fall Festival on Central Street

REGIONAL COMMERCE

The largest sectors of the Massachusetts economy are *Professional, Scientific and Technical Services (16.5%), Real Estate, Rental and Leasing (12.3%), Manufacturing (10.3%), and Health Care / Government, Information and Finance and Insurance all around 8.6%.*

Winchendon has a distinctive niche as a quality small community within commuting distance from major job markets of **Boston, Worcester, Devens** and the **495 Beltway**. It's location is convenient to both suburban and metropolitan amenities, highly affordable housing and rural amenities.

The Town works hard to help local businesses grow and maintain a high quality of life by sponsoring local businesses and community events such as the annual **Fall Festival**, and promotes collaboration among regional agencies and initiatives like the **Montachusetts Regional Planning Commission, North Central Chamber of Commerce**, and North **Central Massachusetts Local Food Works**.

Top 10 Employers in Massachusetts

Rank	Company Name	FTEs
1	General Electric	305,000
2	The TJX Companies	270,000
3	Dunkin Brands	270,000
4	Randstad North America, Inc.	222,000
5	Chase	189,315
6	Ahold USA, Inc.	169,835
7	Thermo Fisher Scientific	125,000
8	Tyco SimplexGrinnel	105,000
9	SK Holding Company, Inc.	104,374
10	Gillette	101,000

Sources: Zippia.com

TOWN GOVERNANCE

Form of Government / Governing Body

Winchendon has a **Board of Selectmen—Town Manager form of government** with an open Town Meeting format.

The 5-member of the Board of Selectmen is the chief policy making agency of the Town. Board Members are elected to overlapping 3-year terms, and serve on a voluntary basis and receive no compensation for their services. The Board of Selectmen appoints a Town Manager, Town Accountant, Registrars of Voters (not the Town Clerk) and other election officers, Board of Appeals, Planning Board, and Conservation Commission. The Board of Selectmen also serves as the Licensing Board for the Town.



Audrey Labrie, Chair: Elected in 2015, Chairwoman since 2021. Profession: Educator. Term expires in 2025.

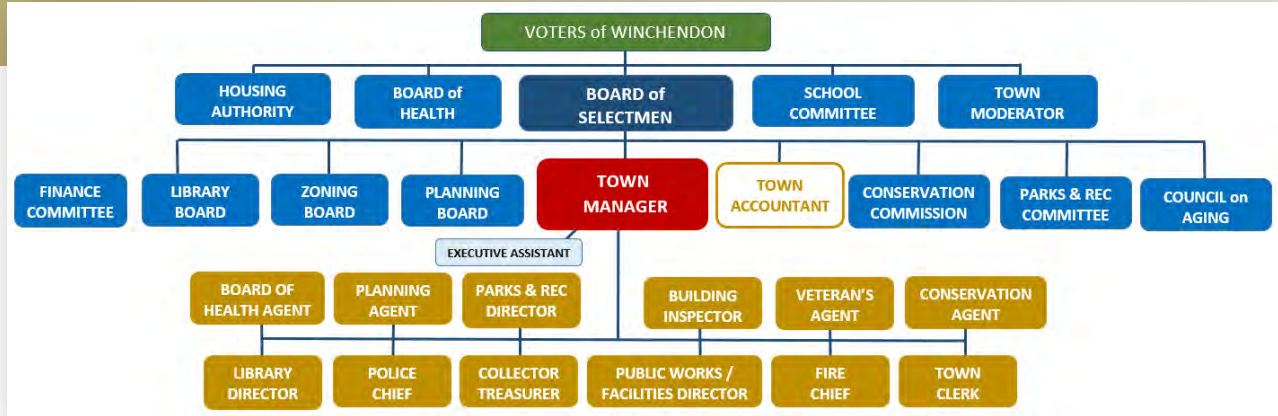
Richard Ward, Vice-Chair: Local-born. Elected in 2019. Profession: US Air Force (ret). Resident since 1946. Term expires in 2025.

Danielle Lapointe: Elected in 2021. Profession: Attorney. Term expires 2024.

Barbara Anderson: Elected in 2015, Past Chairwoman. Profession Education / Counselor. Resident since 1991. Term expires in 2024.

Melissa Blanchard: Elected in 2023. Profession: Teacher / Trades Instructor. Term expires in 2026.

Winchendon also benefits from and provides support to more than 24 [Boards and Commissions](#) (link) including the Recreation Committee, Communications Committee, Conservation Commission, Cultural Council, Council on Aging, Historical Commission, Planning Board, Registrars of Voters, Toy Town Community Partnership and more.



TOWN MANAGEMENT

Town Manager

The Select Board appoints the **Town Manager** to execute policy directives of the Board of Selectmen, for managing the operations and activities of the Town, and for advising the Select Board and various committees on the financial condition of the Town. Winchendon is nearly a full-service city with a **FY2023 Budget of \$32.7 million** (with \$16 million for public education), an **Ad Valorem tax rate of \$13.40 per \$1000** assessed valuation.

The Town Manager is also responsible for the appointment and removal of all employees of the Town with the exception of the Town Accountant (oversight only), collective bargaining and personnel administration, procurement, preparation of annual and capital budgets, and the reorganization of Town agencies under the Manager's jurisdiction.

The Management Team

The Town Manager has thirteen (13) direct reports in the Senior Management Team (*see organizational chart above*).

Previous Town Managers have assembled a dedicated Management Team to lead 250 employees.

- ◇ **Town Clerk** (13 years, 10 as Clerk) efforts support Town Select Board, Town Manager, Public Notices & Records, Vital Statistics, Code Updates, Dog Licenses & Business Certificates .

- ◇ **Town Counsel** (KP Law) for 21 years responsible for providing legal advice, drafting ordinances and resolutions, and prosecuting violations of Town Code and traffic laws.
- ◇ **Police Chief** (1 year) 15 uniformed, 6 non-uniform staff. Patrol, Records & Investigations.
- ◇ **Fire Chief** (10 years) 11 full-time, 9 non-uniformed / part-time, and 30 call/per diem members. Medical & Inspection, Fire Services, Administration, Suppression, Emergency. FFs are dual certified EMT-Firefighters
- ◇ **Town Treasurer / Collector** (3 years, 1 year as Treasurer) provides financial management and is responsible for managing AR/AP, Budgeting, Risk Management, Treasury, Bond Payments, Forecasting, Asset & Debt Management.
- ◇ **Superintendent of Public Works** (7 years, 3 as Director) manages a team of 25 FTEs and 5 part-time employees who are responsible for Parks, Facilities, Cemetery Streets and Building Maintenance, Vehicle Maintenance & Contract Management.
- ◇ **Planning and Development** (10 years) responsible for Code Enforcement, Building Permits, Planning, and Zoning. Supported by Public Works Director and Police Chief.
- ◇ **Other:** Building Commissioner

Robinson-Broadhurst Amphitheater
at Winchendon Community Park



Local Solar Farms



Vacant Doody Vaults Textile Mill

SUCCESSSES

Winchendon has recently experienced a number of **successes** which have provided the Town with strong momentum!!!

- ♥ **Central Street Reconstruction:** \$6,600,000 of improvements to streets, sidewalks, curbs and gutters, utilities and decorative streetlights.
- ♥ **Robinson-Broadhurst Amphitheater:** \$4,000,000 outdoor venue at Winchendon Community Park
- ♥ **Winchendon Master Plan 2020** is a comprehensive 48-page planning document which aims to guide the Town's growth and development for the next 20 years.
- ♥ **Downtown Redevelopment Plan** a comprehensive planning document ready for implementation.
- ♥ **Regional Initiatives / Collaboration:** Several non-profits and similar organizations including *Veterans Outreach, Community Action Committee (CAC), North Country Land Trusts, HEAL Winchendon* and *Mt. Grace*.
- ♥ **Green Initiatives:** 1000s of acres of Solar and Storage Farms, 100s of miles of regional bike & walking trails.
- ♥ **Strong Financial Success:** The Town has emerged from years of difficult financial times and now has a financial reserve.
- ♥ **Organizational Excellence:** The Town has a strong 'family and customer service culture' and a 'family' environment with effective relations between staff, the Select Board and other agencies.

OPPORTUNITIES & PRIORITIES

Local Investment, Economic Renewal, Jobs

With recent public and private investment into aging residential, commercial and manufacturing infrastructure, a revival / renewal has begun, but the local economy

needs momentum to continue to grow local employment opportunities and attract additional investment.

Assets, Instructure & Financial Management

After years of deficits and instability, the Town is in good financial condition, however new employees have indicated a Town Manager with strong working knowledge of local government financial management and best practices would be welcome. An effective Asset Management Plan, Deferred Maintenance Strategy, Vehicle Maintenance Plans & Capital Improvements Programs will be helpful.

Integration of Plans and Initiatives

The **Winchendon Master Plan** and **Downtown Redevelopment Plan** need to be fully implemented and various plans / visions / strategies integrated. The Town Manager will lead the Selectmen, Staff and various Committees and Boards to help set clear, measurable goals, and to help implement, monitor, evaluate and report progress.

Communication, Visibility & Transparency

Creating greater transparency and educating the taxpaying public are important priorities. Developing an effective mass communication strategy and tools are needed to inform the public of the successes and initiatives within the Town and the work of various boards, committees, non-profits and volunteers.

Coaching, Mentoring, Team-building

The town has a strong 'family and customer service culture'. Employees go out of their way for each other and for residents. A coach, advisor, mentor and strategist who leads by example and values the time, inputs, and efforts of others will be welcome and successful.

The Ideal Candidate

Communication & Technology

- ◇ *Implement and use modern digital communication technologies to engage and inform the public;*
- ◇ *Effectively communicates with and listens to elected officials, department heads, employees and citizens privately and in the public forum;*
- ◇ *Balance advocacy & inquiry, understands opposing viewpoints, and successfully mitigates disputes;*
- ◇ *Understands and explains the operational & fiscal impacts of policies, decisions and visions;*

Steady, Proven Leadership & Continuity

- ◇ *Has strong local government experience in Financial Management, Economic Development and Reporting;*
- ◇ *Effectively balances priorities of elected officials and aid in committee effectiveness;*
- ◇ *Balance needs of all departments, manage assets, and helps to develop plans for deferred maintenance;*
- ◇ *Values a highly-effective Management Team;*
- ◇ *Knows how to attract and retain employees who love to work within the Town and don't want to leave;*
- ◇ *Effectively delegates authority, and actively promotes performance measurement without micro-managing;*
- ◇ *Identifies and mitigates risks facing the Town;*

Collaborator, Team Builder & Influencer

- ◇ *A 'personal' professional who is genuinely interested in what motivates and inspires Town employees,*
- ◇ *Outside-the-box thinker and executes tactically;*
- ◇ *Collaborates with social and regional stakeholders;*
- ◇ *Appreciates the 'family & customer service culture' that exists within Town Hall;*
- ◇ *Approachable and positive, has an infectious attitude which mentors and inspires others;*
- ◇ *Instills passion and focus among employees, boards and committee members;*
- ◇ *Values all genders and orientations in the work-place;*

Understands 'Small-community' dynamics

- ◇ *Invested in the success of the community;*
- ◇ *Honest, enthusiastic, sincere and transparent;*
- ◇ *Supports and attends local events. Will be seen throughout and engage with the community;*
- ◇ *Harmonizes technical and non-technical persons.*
- ◇ *Clarifies Town Codes and Policies to residents;*
- ◇ *Understands local government in Massachusetts;*



Qualifications

Education

- ◆ **Bachelor's Degree** in *Public Administration, Finance, Engineering or related* combination of education and experience will be considered.
- ◆ **Masters Degree** in *Public Administration* is *preferred* but not required.

Experience

- ◆ **Minimum of five (5) years** of progressive Local Government as a Senior Executive or Town / City Manager administering capital budgets, economic development, mass communication and human resource management.
- ◆ New England local government experience is not required.

Certifications & Licenses

- ◆ **ICMA-credentialed City / Town Manager** is welcome, but *not required*. Professional credentials from fields listed above are also welcome.



LOCAL AMENITIES

WINCHENDON
History & Cultural Center

Winchendon is home to traditional, rural quality of life which is reflected in its people and its local history. From Winchendon's annual **Fall Fest**, to marvelous State and Regional parks there is something for every member of the family.

- ♦ Enjoy camping, fishing, hiking, kayaking, mountain biking, snowmobiling, horseback riding, or swimming on **The Millers River, Lake Dennison Recreation Area, Otter River State Forest** or [Winchendon Rail Trail](#).
- ♦ All ages can visit the [Winchendon History & Cultural Center](#) and enjoy fitness, sports camps, after-school programs and child-care at the **Clark Memorial YMCA**.
- ♦ Shop for furniture, homewares, antiques, fabrics, flowers and handmade gifts among the small, spirited downtown community of local-owned stores and service businesses.
- ♦ Enjoy an evening or weekend of music at the **Winchendon Music Festival, Winchendon Winds** or events sponsored by the Parks & Recreation Commission including the **Winchendon Fall Festival**.

Robinson-Broadhurst Amphitheater



Winchendon Winds



Cow Yoga



Fall Fest on Central Street



Lake Dennison



REGIONAL AMENITIES



The Millers River near Winchendon

The small size and location of Massachusetts' permits driving through much of beautiful New England within a few hours! Come and enjoy beautiful green and colorful Massachusetts and make Winchendon home.

- ◆ Downhill or cross-country ski at one of 10 regional ski resorts within 90 minutes including **Pats Peak (NH)**, **Mount Wachusett, North Mountain (MA)**, **Granite Gorge (NH)**, or hike **Mount Monadnock (NH)**.
- ◆ Revisit history to the **American Revolution** when you walk the **Freedom Trail**, stand at the **Old North Bridge** in Concord, **Bunker Hill Monument**, or **Old North Church** in Boston. Experience at the re-enactment of the **250th anniversary of the [Boston Tea Party](#)** or stand on the decks of the **USS Constitution**.
- ◆ Educate yourself at the **American Heritage Museum**, at Boston's **[Museum of Science](#)** (+ planetarium, IMAX theater and + 700 exhibits), or visit **MIT**, **Harvard University** and the **Harvard Museum of Natural History**.
- ◆ Enjoy world-famous professional sports' teams including the **Boston Celtics (NBA)**, **Boston Bruins (NHL)**, **New England Patriots (NFL)** or the **Boston Red Socks** at historic **Fenway Park (MLB)**.



Boston Celtics



Boston Tea Party Re-enactment



Baseball at Fenway Park



Harvard Museum of Natural History



USS Constitution



Crotched Mountain Ski & Ride



Memorial Day in Winchendon

EXPRESS INTEREST

RESUME & LETTER OF INTEREST TO...

WinchendonTM@municipalsolutions.org

TIMELINE & SELECTION

Sept 24	Deadline to Express interest
Aug 21 - Oct 23	Screening & Evaluation
late-October	Finalists Selected.
Late October	Interviews & selection

*Expressions of interest are confidential
until finalists are selected.*

Past Town Managers

An excellent track record with 2 *permanent* and 2 *Interim* Town Managers the past 10 years.

Equal Opportunity

Winchendon values diversity & equal opportunity in the workplace. Veterans, all ethnicities, genders, and persons with disabilities who meet the qualifications are encouraged to apply.

Important Links

[FY22 Annual Financial Report](#)

[2021-2026 Capital Improvements Plan](#)

[2022 Audit](#)

[Winchendon Public Schools](#)

Salary & Benefits

The Town offers a competitive salary between **\$135,000 - \$163,000** (DOQ) with incentives for performance, relocation expenses, professional dues, retirement and attractive benefits program.

Residency

Residency in the Winchendon is not required. Living within 30 minutes is highly encouraged.

This recruitment actively managed by:



www.MunicipalSolutions.org



RESUME & LETTER OF INTEREST BY SEPTEMBER 24TH

PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

**City Manager
City of Presque Isle, Maine**

August 31, 2023

This proposal is valid for 90 days

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

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





August 31, 2023

City Council
City of Presque Isle, Maine

Dear City Councilors,

Thank you for the opportunity to submit this proposal to assist the City of Presque Isle 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 15,000 LinkedIn followers and over 2,600 Facebook followers.
- SGR sends targeted emails to our opt-in Job Alert subscriber database of over 5,000 city management professionals.
- Senior Vice President Kevin Hugman will be the designated recruiter and project manager for this search. Please note that Kevin is available to begin the search immediately, but he will be traveling from Oct. 10-21 and will be unable to schedule onsite meetings during that period; however, he will still be reachable via phone and available for virtual meetings during that time.

We are happy to provide references upon request. We are excited about the prospect of conducting this recruitment for the City of Presque Isle, 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 31 full-time employees, 1 part-time employee, 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, Minnesota, New York, North Carolina, Ohio, Oklahoma, and Oregon.

View all SGR team members and bios at: [Meet the Team](#).

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 5,000 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 16,000 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, Alliance for Innovation, 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 minimizes 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

Kevin Hugman, Senior Vice President

KevinHugman@GovernmentResource.com

Office: 940-257-8888



Kevin Hugman joined SGR in 2021 as Senior Vice President after a 25-year career in public sector management including 21 years at the executive level. He most recently served as City Manager for the City of Duncanville, Texas, from 2015 until his retirement in 2020. Kevin previously served as Assistant City Manager for the City of Wichita Falls, Texas from 2010 to 2015. He began his career in local government with the City of Southlake, Texas, where he served as Assistant to the City Manager/Community Services Manager from 1993 to 1998, Director of Community Services from 1998 to 2002, and Director of Human Resources from 2002 to 2009.

Kevin attended the University of Texas at Austin where he received his Bachelor of Science degree in architectural engineering. Upon graduation, he received his commission in the U. S. Navy and served on nuclear submarines. Following active duty, he was employed by TU Electric (now Luminant Energy) as an engineer at Comanche Peak nuclear power plant.

An ICMA credentialed manager, Kevin holds a master's degree in public administration from the University of Texas at Arlington. He retired from the U.S. Navy Reserves in 2007 at the rank of Captain after serving 26 years of active and reserve duty.

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**
- 4. Search Committee Briefing to Facilitate Selection of Semifinalists**
- 5. Evaluation of Semifinalist Candidates**
 - Written Questionnaires
 - Recorded Online Interviews
 - Media Searches - Stage 1
- 6. Search Committee Briefing to Facilitate Selection of Finalists**
- 7. Evaluation of Finalist Candidates**
 - Comprehensive Media Searches - Stage 2
 - Comprehensive Background Investigation Reports
 - DiSC Management Assessments (supplemental service)
 - First Year Game Plan or Other Advanced Exercise
- 8. Interview Process**
 - Face-to-Face Interviews
 - Stakeholder Engagement (may occur earlier in process)
 - Deliberations
 - Reference Checks (may occur earlier in process)
- 9. 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 43,000 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

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: Search Committee Briefing / Selection of Semifinalist Candidates

At this briefing, SGR will provide a comprehensive progress report and facilitate the selection of up to 12 semifinalists. The presentation will include summary information on the process so far, the candidate pool overall, and any trends or issues, as well as a briefing on each candidate and their credentials.

Step 5: 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.

Media Searches - Stage 1

"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.

Step 6: Search Committee Briefing / Selection of Finalist Candidates

Prior to this briefing, SGR will provide each member of the Search Committee with a briefing book on the semifinalist candidates. The briefing book 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 7: Evaluation of Finalist Candidates

Comprehensive Media Searches - Stage 2

"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>.

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 8: 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 9: 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
<ul style="list-style-type: none"> Contract Executed Develop Recruitment Plan, Timeline <u>Individual Interviews with Key Stakeholders</u> 	Week 1
<ul style="list-style-type: none"> <u>Deliverable</u>: Position Profile Brochure Search Committee Reviews and Approves Brochure 	Weeks 2-3
<ul style="list-style-type: none"> Advertising and Marketing Accept Applications Communication with Prospects and Applicants 	Weeks 4-7
<ul style="list-style-type: none"> Initial Screening and Review 	Week 8
<ul style="list-style-type: none"> <u>Search Committee Briefing</u> / Select Semifinalists Questionnaires and Recorded Online Interviews Media Searches - Stage 1 	Week 9
<ul style="list-style-type: none"> <u>Deliverable</u>: Semifinalist Briefing Books and Online Interviews 	Week 10
<ul style="list-style-type: none"> <u>Search Committee Briefing</u> / Select Finalist Candidates 	Week 11
<ul style="list-style-type: none"> Comprehensive Media Searches - Stage 2 Comprehensive Background Investigation Reports DiSC Management Assessments (supplemental service) First Year Game Plan or Other Advanced Exercise 	Weeks 12-13
<ul style="list-style-type: none"> <u>Deliverable</u>: Finalist Briefing Books 	Week 14
<ul style="list-style-type: none"> <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: **\$26,900 ***

** 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 - \$20,500**
- **Expenses:**
 - **Position Profile Brochure & Marketing - \$1,500**
 - 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
 - Job placement on SGR's website
 - Ad placement on SGR's job board
 - Promotions on SGR's social media pages – Facebook, Twitter, LinkedIn, and Instagram
 - **Semifinalist Recorded Online interviews** for up to twelve (12) semifinalists - **\$225 each**
 - **Comprehensive Media Reports** for up to five (5) finalists - **\$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.

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 twelve (12) included in the not-to-exceed price above) are offered for \$225 per candidate.
- Additional comprehensive media reports (over and above the five (5) 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. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

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 12 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

- Cleburne, Texas (pop. 33,000) - City Manager
- Edwardsville, Kansas (pop. 4,700) - City Manager
- Glenn Heights, Texas (pop. 17,000) - City Manager
- Kilgore, Texas (pop. 14,000) - City Manager
- Lafayette, Colorado (pop. 30,000) - City Administrator
- Largo, Florida (pop. 84,000) - City Manager
- Lawton, Oklahoma (pop. 90,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Trophy Club, Texas (pop. 13,000) - Town Manager

2023

- Camp Verde, Arizona (pop. 12,000) - Town Manager
- Bristol, Tennessee (pop. 27,000) - City Manager
- Dobbs Ferry, New York (pop. 11,000) - Village Administrator
- Gatesville, Texas (pop. 16,000) - City Manager
- Glastonbury, Connecticut (pop. 35,000) - Town Manager
- Great Bend, Kansas (pop. 15,000) - City Administrator
- Justin, Texas (pop. 5,000) - City Manager
- Laredo, Texas (pop. 256,000) - City Manager
- Mexia, Texas (pop. 7,000) - City Manager
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Navajo County, Arizona (pop. 106,000) - County Manager
- Ottawa, Kansas (pop. 12,500) - City Manager
- Parker, Arizona (pop. 3,500) - Town Manager
- Rowlett, Texas (pop. 68,000) - City Manager
- Shawnee, Kansas (pop. 69,000) - City Manager
- Snyder, Texas (pop. 11,000) - City Manager
- Williston, North Dakota (pop. 29,000) - City Administrator

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

TOWN MANAGER

Kennebunk, Maine





THE COMMUNITY

Tucked along the southwesterly coast of Maine, just 90 miles north of Boston and 25 miles south of Portland, the Town of Kennebunk offers a quintessential Maine experience: the smell of pine and salt in the air, and the sounds of waves and seagulls traveling on the wind. From its vibrant villages to its sandy beaches, the town takes pride in being the state's safest community and a wonderful place to live and work.

"The only village in the world so named," Kennebunk was originally settled in 1621 as an agricultural and shipbuilding town. The Kennebunk of today, home to more than 11,500 residents within its 43.75 square miles, celebrates that rich tradition and history and has since evolved into a favorite destination for travelers worldwide.

Visitors flock to its rolling hills, the beautiful Mousam and Kennebunk rivers, and the sea-captain mansions of Summer Street. And residents and vacationers alike enjoy its coastline, where they have their choice of Gooch's, Middle, Parsons, and Mother's beaches. Play in the surf, comb the sand for shells, or enjoy a long walk; the string of beaches, some sandy, some rocky, stretch along Beach Avenue and transition from one to the next with the help

of sidewalks that make the stretch a favorite for walkers and joggers.

Kennebunk also invites you to hit the water. Rent a boat or kayak from a shop near Dock Square, hop on a lobster boat tour, or secure a charter for professional fishing or whale watching. Or head out to Route 99 to explore a wildlife management district locally nicknamed the "Blueberry Plains." Adventurers will also enjoy a trip to the Rachel Carson National Wildlife Refuge, where walking trails twist along the salt marshes and estuaries, or visits to Eastern Trail, Bridle Path, Hope Woods, and other treasures of the Kennebunk Land Trust.

Those who prefer to stick to town are likewise well rewarded. Take a stroll along the revitalized historic Main Street to revel in a vibrant shopping and dining scene. Browse one-of-a-kind boutiques and art galleries, grab an ice cream and enjoy some live music. The town is also known for its various restaurants, from popular diners and pubs to wine bars and fine dining.

The Brick Store Museum, Wedding Cake House, and a collection of sea captain homes offer a peek into

THE COMMUNITY *continued*

Kennebunk's past — or check out the town's charming Museum in the Streets, a series of 25 historical markers providing a self-guided tour. To experience modern-day Kennebunk's strong sense of community, don't miss its full calendar of special events, including May Day, Harvestfest, the Kennebunk Art Festival, West Kennebunk Family Fun Days, and Christmas Prelude.

Although Kennebunk's traditional population centers still remain, the houses and landscape are strong reminders of the town's history. The 1970s and '80s brought significant changes in housing types and development patterns, and homes have spread along area roadways to all corners of the community. Residents have their choice of condos, large-lot single-family homes, and everything in between. Approximately 80 new single-family home permits issued in the past year highlight a population boom for the community as more and more people decide they want to feel like they're on a New England vacation year-round.

Kennebunk families are served by Maine Regional School Unit 21, with roughly 2,630 kindergarten through 12th-grade students attending six campuses. Notably, Kennebunk High School is ranked the second best in Maine. The New School offers a private education experience for those who prefer it, and those seeking higher education have their choice of nearby institutions, including the University of New England, York County Community College, the University of Southern Maine, the University of New Hampshire, and Southern Maine Community College.

Excellent healthcare facilities are also available for residents. Kennebunk is home to Southern Maine Health Care and New England Cancer Specialists, with additional options in nearby communities accessible via I-95 and Route 1.

The median household income in the community sits just under \$84,600, and single-family homes in the community have a median price of about \$577,700.



MAJOR EMPLOYERS

Corning

Maine Regional School Unit 21

Kennebunk Savings

Town of Kennebunk

Hannaford

Huntington Common

Home Instead Senior Care

*Kennebunk Center for
Health & Rehab*

RiverRidge Center

Southern Maine Health

HMS Host

Northeast Coatings

The Hissong Group

Plixer

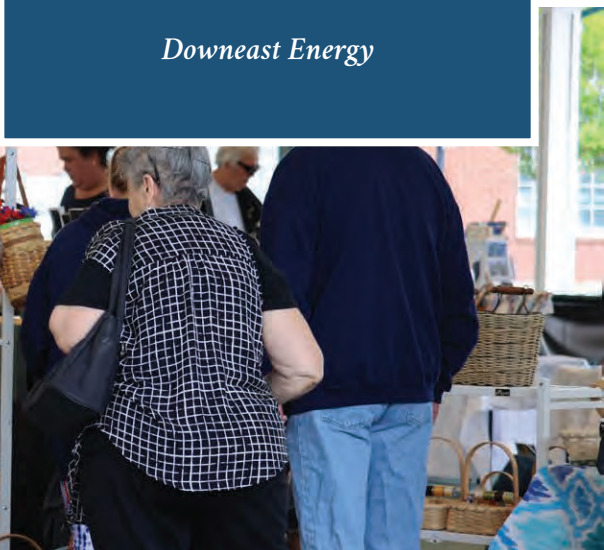
Garrett-Pillsbury

KKW Water District

Tom's of Maine

Bergen & Parkinson

Downeast Energy



TOWN OF *Kennebunk* MAINE

MISSION & VALUES

Mission:

The Town of Kennebunk partners with our community members to deliver superior service in the most efficient and effective manner possible while preserving, protecting, and enhancing the quality of life of all of our residents, businesses and visitors.

Core Values

- ***Culture of Excellence:*** We respect members of the public and each other, and treat all with courtesy and dignity. We are an inviting community that welcomes diversity and embraces our differences, promoting an atmosphere of inclusion and acceptance among our residents and visitors. We rely on teamwork to provide a seamless experience for all citizens. We uphold high ethical standards in our personal, professional, and organizational conduct. We continuously strive to meet the needs of citizens through available resources by being flexible and promoting the use of innovation.
- ***Accountability:*** We accept responsibility for our personal and organizational decisions and actions while delivering cost-effective and efficient services that are done right the first time.
- ***Communication:*** We openly communicate with the public and each other by sharing information and soliciting feedback to achieve our goals.
- ***Diversity, Inclusion, Connection:*** We believe a thriving and vibrant community stems from the diversity of its people. To that end, we strive to ensure people from all backgrounds, experiences, and perspectives feel welcomed, respected and accepted.
- ***Environment:*** We are concerned about our natural, historic, economic, and aesthetic resources and work to preserve and enhance them for future generations.
- ***Safety:*** We use education, prevention, and enforcement methods to protect life and property in the community, and maintain our infrastructure and facilities to provide a safe environment in which to live, work, shop, and play.
- ***Trust:*** We realize the perception of our organization is dependent upon the public's confidence in our commitment to our core values and to meeting the goals set collectively by the Town Manager and Select Board.

Principles of Excellent Service

- Concern for the Individual
- Professional Service
- Accountability
- Positive Engagement
- Timeliness
- Teamwork
- Fair and Equitable Service
- Effective Communication
- Customer Focus

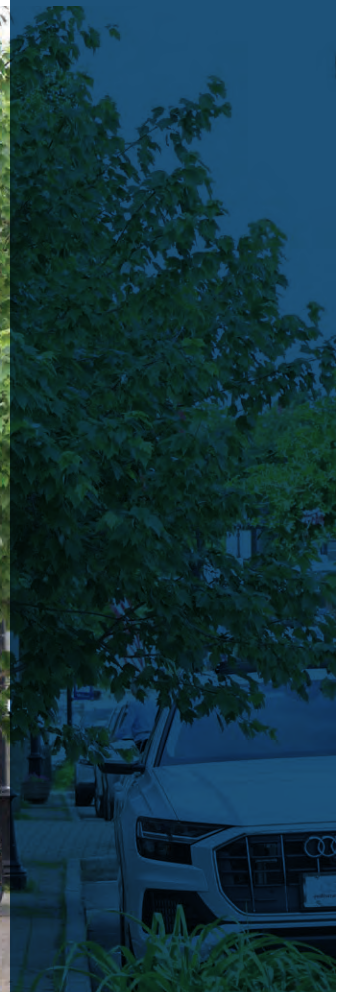
GOVERNANCE & ORGANIZATION

Kennebunk's Select Board — its governing body — consists of seven members elected at large to staggered, three-year terms (with a three-term limit). At the start of new terms each year, the group collectively elects a Chair, Vice Chair and Secretary/Clerk. The board establishes policy for the community, provides public leadership, represents the Town on various regional and state issues, and supervises the Town Manager.

While the Select Board sets the vision, the Town Manager oversees the organization's daily operations. The Town's team includes 96 full-time and four regular part-time employees and 164 variable-hour, on-call, and temporary, seasonal workers, working with a budget of about \$51.1 million this fiscal year. Together, they provide a wide range of municipal services, including Community Development, Public Works, Police, Fire/EMS, Recreation Facilities, and more. Notably, the Kennebunk Free Library is not a Town department but receives Town funds.

The organization recently completed the construction of a new skate park and invested in the sea wall; significant projects currently underway include athletic fields at the high school and a new Public Services building.

Kennebunk has an ad valorem tax rate of \$14.25 (an estimated effective tax rate of \$10.68). With the recent surge in prices since the start of the pandemic, the effective tax rate for a property with a median sales price is about 1.06%.



STRATEGIC GOALS

In their recently approved Comprehensive Plan, Town leaders established several local goals tied to critical elements of the organization and broader community, setting a vision for the years ahead. These include:

Historical and Archaeological

- To conserve and promote Kennebunk's unique identity and small-town character by protecting the Town's historic and archeological resources.

Natural Resources

- To protect, maintain and, where possible, improve the quality of the Town's natural environment and resources – namely: wetlands, wildlife, and fisheries habitat, sand dunes, shorelands, scenic vistas, and unique natural areas.

Marine Resources

- To preserve and enhance water-dependent land uses such as marinas and working waterfront facilities on the Kennebunk River.
- To protect and enhance the Town's marine resources, including fisheries and shellfish habitat, sand dunes, shorelands, estuaries, and related coastal waters.
- To maintain a balance between commercial and recreational uses in the Kennebunk Harbor.
- To continue to cooperate with Kennebunkport and Arundel in the management of the Kennebunk Harbor.

Economy

- To preserve and expand the base of nonpolluting manufacturing, distribution, healthcare, financial services, food and lodging services, and high technology activity in Kennebunk.
- To assure a supply of industrially zoned land that is near public utilities and that has good access to the regional transportation system, particularly the Maine Turnpike.
- To support tourism as a vital part of the local economy, but manage it so that it enhances the Town's historic, architectural and scenic features and does not compromise the qualities that make Kennebunk unique.
- To support the local arts community and promote the town as a center for cultural, social and educational programs.
- To diversify the local economy.
- To maintain and actively foster Downtown Kennebunk, Lower Village and West Kennebunk Village as vital commercial areas, and to preserve their traditional village pattern of development.
- To maintain and actively foster small scale, neighborhood-oriented commercial uses in the Downtown, Lower Village and West Kennebunk Village.
- To support working from home as a rational form of land use provided it does not cause nuisances in the neighborhoods or alter the residential character of neighborhoods.

STRATEGIC GOALS *continued*

Housing

- To formulate through Zoning ordinances the ability to continue to provide a variety of housing units to serve the diverse needs of residents.
- To continue to meet state requirements for “affordable” housing to support the needs of both workers and seniors.
- To foster public-private partnerships to achieve these goals.
- To support the creation of housing that meets the needs of older residents, including housing that is rehabilitated, adapted or newly constructed to help older adults age in place.

Recreation

- To maintain and promote land/water recreational sites, programs and facilities for residents and visitors.
- To provide a varied assortment of recreational opportunities to meet the needs of aging adults, including both outdoor and indoor sources.

Transportation

- To promote a safe and sustainable transportation system that supports the village/rural pattern of settlement and encourages modes of travel alternative to automobiles within and between villages, negating the need for seniors and families to use autos when doing local errands.



STRATEGIC GOALS *continued*

Public Facilities and Services

- To collaborate with utilities to ensure reliable and cost-efficient services to Town residents and businesses, and to support Growth Areas as defined by the Town's zoning ordinances.
- To support the inclusion of older adults' contributions to Town quality of life.

Fiscal Capability and Capital Improvement Plan

- To improve the efficiency and effectiveness of public service delivery through formal and informal means of inter-local cooperation and communication
- To proactively evaluate the adequacy of current public facilities and procedures, and formulate plans to expand and update as necessary, while concentrating Town financial resources in Growth Areas.

Climate Change and Sea Level Rise

- To recognize the full range of potential climate change impacts on Town residents and the local economy and formulate a set of strategies to minimize the negative consequences therefrom.

Future Land Use Plan

- To encourage growth in areas that can support it with existing Town infrastructure and public utilities, to do all that is possible to keep housing options affordable, and to protect our limited natural resources.

What We Value:

The Town of Kennebunk's Select Board is committed to fostering an environment that values diversity and inclusion. Kennebunk celebrates the diversity of culture, background, experience, and thought.

Who We Are Seeking:

We are seeking dedicated individuals who want to offer their talents, experience, and perspectives to make a difference in the Springfield community! We are seeking authentic individuals from all different backgrounds and perspectives who are committed to creating a welcoming and inclusive community.

What to Consider When Applying:

Studies have shown that women and minorities are less likely to apply when they haven't seen people they identify with in a certain role or career. Additionally, individuals often don't apply because they believe they are unable to perform every task in the job description. We are most interested in finding the best candidate for the job. The Town will consider any equivalent combination of knowledge, skills, education, and experience to meet minimum qualifications. If you are interested in applying, we encourage you to think broadly about your background and skill set for the role.



ABOUT THE POSITION

Appointed by and answerable to the Select Board, the Town Manager serves as Kennebunk's chief administrative official, responsible for its resources, operations, and the general conduct of its affairs as established in the Town Charter.

The position is responsible for managing and supervising all of the Town's departments, agencies, and offices, ensuring that operations align with the vision, policies, and goals of the Select Board, and providing professional advice to elected and appointed officials. It also oversees the creation of short- and long-range plans; prepares studies, reports, and recommendations; develops and monitors the annual budget; identifies community needs and potential solutions; and works directly with the public, regularly engaging with residents, business owners, and other stakeholders.

As the leader of the organization, the role plans and organizes workloads and staff assignments; trains, motivates, and evaluates assigned employees; and recommends division directors for confirmation by the Select Board. It also represents the Town to outside organizations, members of the media, as well as various regional, state, and federal agencies.

OPPORTUNITIES & CHALLENGES

In their recently approved Comprehensive Plan, Town leaders established several local goals tied to critical elements of the organization and broader community, setting a vision for the years ahead. These include: .

- **Strategic Planning** - The new Town Manager will need to be strategy-minded, someone who can marry passionate public input with responsible public policy and help a relatively new Select Board feel confident in their decisions. After a five-year development process, the community is eager to see further progress made on the adopted comprehensive plan. Town leaders have also established a Charter Review Committee to consider changes. Strategic planning should respect the Town's history and the views of its longtime residents while making room for new perspectives and keeping a keen eye on the Town's long-term sustainability. And, of course, plans should balance community service-level expectations with staffing and funding levels.





OPPORTUNITIES & CHALLENGES *continued*

- ***Building Relationships*** - Establishing and building strong relationships within the community will be a top priority for this position, and honesty and transparency will be critical. In addition to residents and members of the business community, the new Town Manager should be prepared to strengthen ties with neighboring cities and the regional school district so that progress can be made on common issues.
- ***Community Investments*** - Town leaders have identified a need for improved public transportation and more parks and recreation programming. A new solid waste contract is also pending to address a desire for improved waste management.
- ***Public Engagement*** - Kennebunk has a proud history of community engagement, and the ability to participate in the political process is part of the Town's identity. The incoming Town Manager needs to have an appreciation and understanding for the New England style town meeting form of government. They will want to continue — and enhance — proactive communication with the community to ensure residents understand issues facing the Town and feel connected to decision-makers. They will also want to support and utilize the established citizen committees and find opportunities to refresh them, helping those volunteers understand their role in supporting staff and the Select Board.
- ***Economic Development*** - At present, Kennebunk is primarily a bedroom community with some tourism and industry. Town leaders understand the need to diversify the tax base, be more business-friendly, and perhaps pursue an innovative business district along the Route 1 corridor. The new Town Manager will want to get up to speed on the recently adopted economic plan and work quickly to implement it.
- ***Housing*** - Housing costs for workers and families who want to live close to work or raise a family in Kennebunk have become a challenge as the Town's growth is pricing people out. Zoning and development regulations to support the new comprehensive plan are a priority, along with policies to address short-term rentals, absent landlords, and recent state legislation focused on increasing housing opportunities, including accessory and micro-housing.
- ***Fiscal Sustainability*** - The new Town Manager should be skilled in local government financial best practices to guide fiscal and debt strategies in the short and long term. The successful candidate will need to manage the cost of Town aspirations, ensure sustainability within the capital improvements program, and remain sensitive to property valuations and their impacts on local property owners.
- ***Climate Action*** - Maine remains committed to taking climate change seriously and acting locally to protect the state's unique environment. Kennebunk hopes to partner with neighboring communities to develop a four-town initiative to create local climate change action plans, and the new Town Manager will want to prioritize hiring a sustainability director to lead efforts for the organization.
- ***Recruitment & Retention*** - As with any service-driven organization in the current job environment, the ability to attract and retain excellent talent is an ongoing challenge. Among the incoming manager's first tasks will be filling key leadership positions within the organization and working with the team to improve employees' work-life balance. Employees also hope to maintain their sense of family and harmony within the organization despite retirements and leadership changes, underlining the importance of making the right hires and onboarding them effectively. And Town leaders would like to see greater diversity among the organization's leadership, reflective of the region's changing demographics. Finally, experience in contract negotiations with employee unions will serve this position well.

IDEAL CANDIDATE

The Town of Kennebunk is seeking a skilled, approachable, and collaborative, public servant-leader with experience guiding organizations and communities through change and growth.

Candidates should be open-minded, innovative, and curious, professionals who embrace input and know how to build consensus on even contentious issues. They should be honest, trustworthy, warm, and responsive, able to build rapport with anyone. They should understand when to lead and when to follow, putting the team and the community's goals first rather than their ego.

The successful candidate will be patient and inclusive, sensitive to the fact that change can be uncomfortable for residents who are passionate about the Kennebunk they have known and loved for many years. They will have thick skin, someone able to roll with the punches in a dynamic organization.

While prior town/city manager experience is not required, candidates for this role must understand how to deal with tight budgets, work with unions, manage projects, and strategically pursue major goals. Familiarity with state and federal grant programs, public safety needs, small-town politics, economic development, and a beach-focused tourism community's seasonal fluctuations will be valuable. Additionally, they should have extensive knowledge of climate change and environment impacts on coastal communities.

Area residents care about authenticity, and the successful candidate must prioritize getting to know the town — where it has been and where it's going. Those connections to and within the community will be critical to the new Town Manager's success. Community leaders are also looking for strong communication and negotiation skills, someone who can build bridges and ease tensions amid passionate perspectives.

The ideal candidate is visionary - innovative and proactive, yet realistic, willing to challenge old practices in pursuit of the big picture. They must be able to walk the walk rather than just talk the talk, though, putting those plans into action and moving ideas forward effectively.

As the organization's leader, they should also have the skills to motivate and inspire Town staff, empowering them to find solutions and advocating for their needs. Additionally, they should be able to ensure all employees know they are valued through engagement, listening, advocating for resources, and promoting inclusion among different classes of employees. That will require a sense of humor, open-door policy, and high emotional intelligence — a leader of people who can help new hires coming into the organization to hit the ground running and instill a sense of renewed purpose among longtime employees.

EDUCATION & EXPERIENCE

This position requires a bachelor's degree in public administration, management, urban planning, business, or a related field with a master's degree preferred. Experience working in a progressively responsible position within municipal government preferred. Candidates should have at least five years of management-related experience, and experience working with commissions, boards, or committees is preferred.

Any equivalent combination of education and experience sufficient to perform the position's responsibilities may be considered.

While the successful candidate for this position will not be required to live in town, residency is strongly preferred. Close proximity will be necessary to stay engaged with the community and respond to issues as needed.

COMPENSATION & BENEFITS

The Town of Kennebunk is offering a salary range of \$112,622 to \$168,933 for this position, depending on qualifications and experience. The organization also boasts a comprehensive benefits package, including health, dental, vision, and life insurance; generous sick and vacation policies; paid time off; 13 paid holidays, personal days, and a floating holiday. The Town also has an active Employee Assistance Program and wellness offerings.

Kennebunk participates in MissionSquare Retirement Plans, a 401a plan with a 7.5% employee contribution and 1:1 employer match, or employees may choose a MainePERS defined benefit plan. The Town also offers a supplemental 457 plan.



APPLICATION PROCESS

[Please apply online](#)

For more information on this position, contact:

Mark McDaniel, Senior Vice President
MarkMcDaniel@GovernmentResource.com
817-773-6558



As an Equal Opportunity Employer, the Town of Kennebunk shall employ, upgrade, and promote the best qualified person(s) who are available at the salary level established for the position, without discrimination as to race, religion, age, sex, physical or mental disability, sexual orientation (including gender identity and expression), national origin or ancestry, marital status, citizenship, genetic information, protected veteran status, color, political affiliation, whistleblower activity, or any other status protected by law.

RESOURCES

Town of Kennebunk
kennebunkmaine.us

Economic Development
kennebunkmaine.us/326/Economic-Development

Comprehensive Plan
kennebunkmaine.us/414/2021-Comprehensive-Plan

Kennebunk-Kennebunkport-Arundel Chamber of Commerce
gokennebunks.com

Town of Kennebunk Social Media



**Agreement for Executive Recruitment Services
for City Manager
between**

Strategic Government Resources, Inc. ("SGR")
and
City of Presque Isle, Maine ("Organization")

Scope of Services:

SGR shall provide all services for recruitment as described in the formal proposal submitted and described in abbreviated form as follows:

- Development recruitment plan and timeline
- Production of a professional position profile brochure
- Advertising and marketing
- Communication with prospects and applicants
- Initial screening and review of applications
- Briefing with search committee to facilitate selection of semifinalists
- Written questionnaires, customized to the position, for up to twelve (12) semifinalists
- Recorded online interviews for up to twelve (12) semifinalists
- Stage 1 Media Searches on up to twelve (12) semifinalists
- Electronic delivery of semifinalist briefing books and online interviews
- Briefing with the search committee to facilitate selection of finalist candidates
- Assistance with development of advanced exercise for finalist candidates, if desired
- Comprehensive Stage 2 Media Reports for up to five (5) finalist candidates
- Comprehensive background investigation reports on up to five (5) finalist candidates
- Comprehensive Reference Checks for up to five (5) finalist candidates
- Electronic delivery of finalist briefing books
- Assistance with interview questions and interview schedule
- Assistance with stakeholder engagement, if desired
- Assistance with negotiating terms and conditions of employment, if desired
- Up to Two (2) in-person visits by the Recruiter to the Organization.
- Periodic updates regarding the progress of the search, as frequently as desired

The Organization agrees:

- To provide photos/graphics and information necessary to develop position profile brochure
- To respond to drafts of documents and reports in a timely manner; failure to do so may extend timelines and can negatively impact the outcome of the process
- To refer all prospective applicants to SGR and shall not accept applications independently during the recruitment process

- To provide reproduction of hard copy brochure, if desired
- To provide any direct mailings desired by the Organization
- To provide legal opinions to SGR regarding when and if any information must be released in accordance with Public Information requests
- To directly reimburse finalists for travel-related expenses to interview
- That Organization is ultimately responsible for candidate selections and that Organization will not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law
- To comply with the Fair Credit Reporting Act (FCRA) with regard to any pre- or post-adverse action notices and requirements if the Organization decides not to hire a candidate as a result of their credit history report

SGR shall be compensated by the Organization as detailed below:

Not-to-Exceed Price = \$26,900*

** Ad placement costs are not included in the Not-to-Exceed Price. These 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 - \$20,500**
- **Expenses** (will appear on invoices until not-to-exceed price is reached):
 - **Position Profile Brochure & Marketing - \$1,500**
 - Production of a professional position profile brochure
 - Custom-designed graphics for social media and email marketing
 - An 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
 - Job placement on SGR's website
 - Ad placement on SGR's job board
 - Promotions on SGR's social media pages – Facebook, Twitter, LinkedIn, and Instagram
 - **Semifinalist Recorded Online interviews** for up to twelve (12) semifinalists - **\$225 each**
 - **Comprehensive Media Reports** for up to five (5) finalists - **\$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.

Reimbursable Expenses

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

Supplemental Services (not included in the not-to-exceed price above):

- SGR will conduct a Stakeholder Survey for \$1,000. SGR will provide recommended survey questions within three (3) business days of project initiation. SGR will set up an online survey within one (1) business day after Organization has reviewed and approved the survey questions. Stakeholders can be directed to a web page or invited to take the survey by email. SGR and Organization will agree to the open survey time period, typically ten (10) to thirty (30) days. Organization shall be responsible for marketing and promoting the survey to stakeholders. A written summary of results is provided to Organization within three (3) business days of survey close date. Survey is not validated statistically.
- Additional online interviews (over and above the twelve (12) included in the not-to-exceed price above) are offered for \$225 per candidate.
- Additional comprehensive media reports (over and above the five (5) 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 will be reimbursed directly by the Organization for travel expenses.
- 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. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Organization Contact for Invoicing:

Name: _____

Position: _____

Email: _____

Phone: _____

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 12 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.

Expenses in the event of a repeat search shall include:

- Position Profile Brochure Edits, Custom Graphics, and SGR Marketing - \$750
- Ad placements, as approved by the organization, will be billed back at actual cost with no markup for overhead.
- Online interviews - \$225 per candidate.
- Comprehensive media reports - \$500 per candidate.
- Background investigation reports - \$400 per candidate.
- Reference checks - \$225 per candidate.
- DiSC Management Profile - \$175 per candidate
- Should the organization request printing of semifinalist or finalist briefing materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Recruiter travel. 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.
- Stakeholder Survey - \$1,000
- 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.

Terms and Conditions:

- The Organization reserves the right to terminate this agreement at any time upon giving SGR seven days advanced written notice to SGR, Attn: Melissa Valentine, PO Box 1642, Keller, TX 76244 or by email to MelissaValentine@GovernmentResource.com. In such an event, SGR will be compensated for all work satisfactorily completed up to and through the date of termination.
- The Organization acknowledges that the nature of executive recruitment is such that SGR engages in discussions with prospects throughout the process who may or may not ultimately become a candidate, and that SGR is utilizing its proprietary network of relationships to identify and engage prospective candidates, and that premature release of such proprietary information, including names of prospective candidates who SGR may be having conversations with as part of the recruitment process, may be damaging to the prospects and SGR. Accordingly, the Organization acknowledges and, to the extent provided by law, agrees that all information related to this search is proprietary, and remains the property of and under the exclusive control of SGR, regardless of whether such information has been shared with the Organization or not, including all decisions regarding release of information, until such time that a finalist is named. At the time finalists are determined, all information related to the finalists shall become the property of the Organization and all decisions regarding public disclosure shall be determined by the Organization, except that psychometric assessments, questionnaires, and any information produced by SGR is proprietary and shall not become the property of the Organization or subject to disclosure. If the Organization receives an open records request, the Organization shall notify and share the request with SGR in writing as soon as possible but within no more than three (3) business days of receipt. The Organization shall provide sufficient time for SGR to notify and provide advance notice to the impacted individuals prior to the Organization releasing the required information with protected information redacted.

Approved and Agreed to, this the _____ day of _____, 2023 by and between

Jeri J. Peters, President of Executive Recruitment
Strategic Government Resources

City of Presque Isle, Maine

Printed Name: _____

Title: _____