

**CITY COUNCIL CONFERENCE**  
**MUNICIPAL BUILDING CONFERENCE ROOM**  
**201 WEST GRAY, NORMAN, OK**

**OCTOBER 25, 2018**

**5:30 P.M.**

- 1. INTERVIEW POTENTIAL RECRUITMENT FIRMS TO ASSIST IN THE SEARCH FOR A CITY MANAGER.**



## Proposal

**City of Norman, Oklahoma**

Proposal to Provide Executive Recruitment

September 7, 2018

**Springsted | Waters**  
14285 Midway Road, Suite 340  
Addison, Texas 75001

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Sharon Klumpp, Senior Vice President  
[sklumpp@springsted.com](mailto:sklumpp@springsted.com)  
651-223-3053

**Remittance Address**  
380 Jackson Street, Suite 300  
Saint Paul, Minnesota 55101-2887

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14285 Midway Road, Suite 340  
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[www.springsted.com](http://www.springsted.com)

## **LETTER OF TRANSMITTAL**

September 7, 2018

Ms. Jackie Crumrine  
Human Resources  
City of Norman  
201 W Gray Street  
Norman, Oklahoma 73069

**Re: Request for Proposal to Provide Executive Recruitment**

Dear Ms. Crumrine

Thank you for contacting Springsted | Waters to learn more about our executive search services. We appreciate the opportunity to submit information about our basic executive search services and how S|W would approach working with the City of Norman to conduct a successful search. We strongly believe that the city council “owns” the search process; we take pride in our ability to partner with public sector employers to adapt the process to meet their specific needs.

Our extensive experience in providing executive recruitment services to cities, counties and other public-sector organizations nationwide will be beneficial for this recruitment and allow us to find the ideal candidate for the City of Norman.

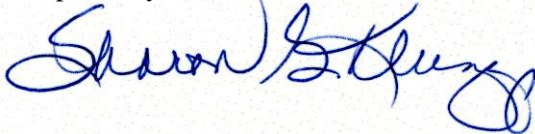
We know that you have options for using other recruitment firms. However, we believe that our approach sets us apart from our competitors in the following unique ways:

- If selected as an option, our web-based survey can be used to determine the key community-wide issues and priorities that are essential considerations for the City and the selection committee to consider. This survey can be completed by the City’s employees, community leaders and citizens as directed by the City. Survey results provide the City Council with important feedback for development of the profile for the ideal candidate. estimated duration of the project timeline.
- Management/Leadership Style Assessment Analysis completed by the candidates to determine if a candidate’s management style matches the approved management/leadership style profile for the ideal candidate;

- Video candidate interviews through a proprietary system will be made available to the Mayor and City Council to assist in the selection process; and
- Utilization of a proprietary online application system exclusively licensed to Springsted | Waters (S|W) to facilitate talent management. The system has been designed by S|W to customize applicant flow and tracking. It allows ease of communication with applicants and the ability to conduct database inquiries for candidates based on characteristics important to the City such as geographic location and specific experience, expertise and qualifications.

The proposal document will provide you the details about our approach, expertise, client references and pricing for this executive recruitment. If you have any questions, please contact me at 651-223-3053 or by email at [sklumpp@springsted.com](mailto:sklumpp@springsted.com). Our Team would consider it a professional privilege to provide these services to the City of Norman.

Respectfully submitted,

A handwritten signature in blue ink, appearing to read "Sharon Klumpp", with a stylized flourish at the end.

Sharon Klumpp, Senior Vice President  
*Consultant*

sml

# City of Norman, Oklahoma Proposal to Provide Executive Recruitment

## I. General Information

The Executive Recruitment Division of Waters Consulting merged with Springsted Incorporated in May 2014, establishing one of the largest public sector executive recruitment and human capital consulting firms in the United States. Our firm name, Waters & Company, has recently been changed to Springsted | Waters (S|W) to more clearly reflect the connection to and support from the Springsted group of companies. Springsted Incorporated, our parent company, has been a Women Business Enterprise since 1993. Three employee-owners lead the Springsted group of firms and their 70-member staff. Our corporate office is located in Saint Paul, Minnesota, with regional offices located in Dallas, Texas; Chicago, Illinois; Milwaukee, Wisconsin; Des Moines, Iowa; Kansas City, Missouri; Richmond, Virginia; Atlanta, Georgia; and Denver, Colorado.

S|W has a team of ten recruitment consultants and project coordination staff available to meet your executive recruitment needs. Each consultant assigned to this recruitment has experience working with cities and the many different disciplines that comprise the City of Norman organization. Our consultants bring an experienced, participatory and energetic perspective to each engagement; our unique approach and personal touch are reflected in our internal standard to provide outstanding services that exceed the City's expectations. Since 2013 our combined consultant team has conducted more than 466 executive recruitments.

The S|W Recruitment Project Team will partner with the Mayor, City Council and designated staff as your technical advisor to ensure that the recruitment process for your next City Manager is conducted in a thorough and professional manner. Our objective is to generate high-quality candidates and assist you with the screening and evaluation of these candidates.

We have structured the S|W Recruitment Project Team to draw upon S|W's and Springsted's 50-plus years of service to the public sector and to leverage S|W's experience and capacity to focus nationwide to find the most qualified candidates.

### Physical Address

Springsted | Waters  
380 Jackson Street, Suite 300  
St. Paul, Minnesota 55101  
Office: 651-223-3000  
Fax: 651-223-3002

## II. Response to Scope of Work

### Task I: Recruitment Brochure Development and Advertising

The development of a comprehensive recruitment brochure that includes a profile of the ideal candidate is an important first step in the recruitment process. This profile includes the required academic training, professional experience, leadership, management and personal characteristics related to the success of the candidate in the position of City Manager. The recruitment brochure will also have a profile that captures the essence of the City as a highly-attractive venue for the successful candidate to live and work.

To prepare the recruitment brochure, the Recruitment Project Team Leader will come on site to meet with the Mayor, City Council and designated staff and the Search Committee to discuss the required background, professional experience and management and leadership characteristics for your City Manager position. We schedule one-on-one meetings with the Mayor and City Council members and small group meetings with others as designated, including department heads and community stakeholders, to broaden our understanding of the position’s leadership and management requirements, current issues, strategic priorities and to identify expectations for the City Manager. [See example of a recruitment brochure in Appendix I.]

The Recruitment Project Team will also work with the City of Norman to develop an advertising and marketing strategy to notify potential candidates about the vacancy and conduct an open recruitment that encourages applications from a talented and diverse pool of candidates. Our Team will place ads in appropriate professional publications, websites and local print media, if required. Additionally, S|W has a highly-accessed website that has a special location attracting many potential candidates to upload their resumes. The aggressive advertising and marketing campaign for top talent will include national, state, regional and local elements as determined during our initial meetings with the City’s representatives. Our customized mailing list, selected from our extensive database and contacts collected at appropriate public-sector conferences, will be utilized to further promote the position. Finally, we make extensive use of LinkedIn and contacts with university public administration programs that maintain regular contact with alumni.

Advertisements for the City Manager position could be placed with:
International City/County Management Association
Oklahoma Municipal League and state municipal leagues in neighboring states
City Management Association of Oklahoma and similar associations in neighboring states
Careers in Government (includes diversity outreach)

Project Milestone	Deliverables	Estimated Duration
Position profile and recruitment brochure development.	<ul style="list-style-type: none"> <li>Onsite interview with the City.</li> <li>S W will receive information regarding the City’s budgets, organizational charts, images, logos, etc.</li> <li>Develop draft documents (Recruitment Brochure, Advertisement, Marketing Letter and Timeline).</li> </ul>	2 - 3 Weeks

Approve brochure, commence advertising and distribute marketing letter.	<ul style="list-style-type: none"> <li>• Brochure sent to the City for final approval.</li> <li>• Commence advertising and distribution of recruitment brochure.</li> </ul>	2 Weeks
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## **Task II: Execution of Recruitment Strategy and Identification of Quality Candidates**

Utilizing the information developed in Task I, S|W will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. Please note that S|W will be attending the ICMA Annual Conference in Baltimore from September 23-26, which provides an excellent venue to bring this position to the attention of prospective candidates.

Often, well-qualified candidates are not actively seeking new employment and will not necessarily respond to an advertisement. However, if a potential candidate is presented with the opportunity directly and in the proper manner, he or she may apply. We take pride in our ability to locate highly qualified candidates across the nation based on the professional contacts and relationships we have developed and maintained over many years.

These efforts will be supplemented by the creation of an appropriate database utilizing our extensive, interactive applicant database for the City Manager position. This will provide the S|W Team with the ability to customize applicant flow and tracking, communication with applicants and conduct database inquiries for candidates based on characteristics important to the City such as geographic location, particular experience, expertise and credentials.

During this part of the process the Recruitment Project Team will work with the Mayor, City Council and designated staff to develop a leadership and management style benchmark for the ideal candidate. This benchmark goes beyond the one-on-one meetings described in Task 1. We ask the Mayor, City Council and other designated staff to complete an electronic questionnaire that focuses on the competencies, work values and behaviors successful associated with successful job performance. Using this research, we compile all responses and create a benchmark identifying the key leadership/management competencies, work values and behaviors and match the candidates to each attribute.

Each candidate submitting a resume is sent a timely acknowledgement by our Team, including an approximate schedule for the recruitment. Throughout the recruitment process, communications are maintained with each candidate regarding information about the recruitment progress and their status in the process. We take pride in the many complimentary comments made by candidates regarding the level of communication and the professional manner in which they are treated during our recruitments.

Project Milestone	Deliverables	Estimated Duration
Execution of recruitment strategy and candidate outreach.	<ul style="list-style-type: none"> <li>• Online data collection and profile development.</li> <li>• Development of interactive searchable applicant database for recruitment of the City Manager.</li> <li>• S W performs direct outreach to prospective candidates identified in the recruitment strategy.</li> </ul>	4 – 5 Weeks



	<ul style="list-style-type: none"> <li>Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics.</li> </ul>	
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### **Task III: Screening of Applicants and Recommendation of Semi-Finalists**

In Task III the Recruitment Project Team, under the direction of Sharon Klumpp, will screen the candidates against the criteria within the position and candidate profiles and develop a list of semi-finalists for recommendation to the Mayor and City Council.

The most promising applicants will receive a candidate essay questionnaire to complete that will provide additional information about the candidates’ background and experience. We will then narrow the list to a group of 10-15 semifinalists for your review and to select finalists.

Another unique aspect of our recruitment process is our use of online recorded interviews for the screening process. Responses are timed and questions are not provided in advance. This tool allows our Team to develop a more comprehensive understanding of the candidate’s ability to think “on their feet” as well as their personal and professional demeanor. This virtual interview can be reviewed by individual selection team members as well as the consulting team for later review and discussion.

Our Team will provide an online link for the Mayor, City Council and others designated, who have input into the hiring decision, allowing them to review the recorded responses. This provides the organization with an additional candidate assessment that can be customized to fit the unique needs of the City.

Throughout the process, you will have access to our Master Applicant List (MAL), which will provide pertinent data for each applicant.

<b>Project Milestone</b>	<b>Deliverables</b>	<b>Estimated Duration</b>
Applicant screening and recommendation of semi-finalists.	<ul style="list-style-type: none"> <li>S W compares applications to the approved candidate profile developed in our searchable applicant database.</li> <li>S W develops customized candidate questionnaire &amp; due diligence questionnaire to provide to applicants who most closely meet the candidate profile.</li> <li>Top 10-15 candidates identified as semi-finalists.</li> <li>Semi-Final Report is prepared, including the brochure, master applicant list, cover letter, resume and completed questionnaire of candidates to be considered.</li> <li>S W and the City review video interviews.</li> <li>Recruitment Project Team Leader meets with Mayor and City Council to review recommended semi-finalists. Mayor and City Council selects finalists for on-site interviews.</li> </ul>	2 - 3 Weeks

	<ul style="list-style-type: none"> <li>Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed.</li> </ul>	
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#### **Task IV: Conducting Background Checks, Reference Checks and Academic Verifications**

When the Mayor and City Council approves of a group of finalists for on-site interviews, S|W will begin the process of conducting reference checks, background checks and academic verifications. A Confidential Reference Report is prepared for each finalist to complete our understanding of his/her management and leadership characteristics and professional work performance.

For the background checks, S|W will develop information on the candidates in the following areas:

- Consumer Credit
- City/County Criminal
- City/County Civil Litigation
- Judgment/Tax Lien
- Motor Vehicle
- Educational Verification
- Bankruptcy
- State District Superior Court Criminal
- State District Superior Court Civil Litigation
- Federal District Criminal
- Federal District Civil Litigation

*To ensure that our quality standards are maintained, we require a minimum of ten business days between the time that you select the finalists for on-site interviews and when we submit the candidate documentation for your final interview process.*

Project Milestone	Deliverables	Estimated Duration
Design final process with City Council for on-site interviews with finalists.	<ul style="list-style-type: none"> <li>S W confirms interviews with candidates.</li> <li>Travel logistics are scheduled for the candidates.</li> </ul>	1 – 2 Days
Background checks, reference checks and academic verification.	<ul style="list-style-type: none"> <li>S W completes background checks, reference checks and academic verifications for finalists.</li> </ul>	2 Weeks

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

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

The Recruitment Project Team Leader will be available during the final interview process to answer questions about the candidates and, if requested, assist with the final evaluation of the candidates. In addition, if the City requests the service, we will assist you with the development of a compensation package and related employment considerations and assist with the negotiation of an employment agreement.

Project Milestone	Deliverables	Estimated Duration
Final Report prepared and delivered to City.	<ul style="list-style-type: none"> <li>Final Report is prepared, including brochure, interview schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions.</li> </ul>	1 Day
On-site interviews with finalists.	<ul style="list-style-type: none"> <li>Interviews are scheduled.</li> <li>Recruitment Project Team Leader attends client interviews and is available to participate during deliberations of candidates.</li> </ul>	1 – 2 Days
Offer made / accepted.	<ul style="list-style-type: none"> <li>If requested, S W participates in candidate employment agreement negotiations.</li> <li>S W notifies candidates of decision.</li> <li>S W confirms final process close out items with the City of Norman.</li> </ul>	3 – 5 Days

**Strategy for Recruitment of Diverse Candidates**

Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We have established strong and credible networks with minority and female leaders nationwide. In addition, we are corporate members of the National Forum for Black Public Administrators (NFBPA) and the Hispanic Network and are on their National Corporate Advisory Council. We participate in their membership events on a regular basis.

To that end, we take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. In this recruitment, we will use our established networks to make direct and personal contacts with prospective minority and female candidates and encourage them to consider the City of Norman’s City Manager position. Because of our performance record in presenting a diverse applicant pool, these prospective candidates know they will be fairly considered in the process.

Springsted | Waters, is committed to ensuring equitable participation in our business and employment opportunities without regard to race, color, religion, sex, national origin, age, disability, veteran status, marital status or sexual orientation. As a leader in the executive recruitment industry, we take positive actions to prevent and to remedy any discriminatory effects of business and employment practices.

Springsted | Waters is a WBE.

## Timeline

Below is an estimated Timeline for the executive recruitment process. You will be asked during the first on-site meeting to review and approve a Timeline for the recruitment project. It is our intent to conduct the recruitment expeditiously, but not at the expense of finding high-quality candidates for you.

<b>CITY OF NORMAN, OKLAHOMA EXECUTIVE RECRUITMENT PRELIMINARY TIMELINE</b>		
The following Timeline represents a preliminary schedule for your executive recruitment based on a commencement date of September 17. Actual target dates will be developed in consultation with and approved by the Mayor and City Council.		
<b>Project Milestone</b>	<b>Deliverables</b>	<b>Target Date</b>
Profile development, advertising and candidate outreach.	<ul style="list-style-type: none"> <li>S W completes on-site interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline.</li> <li>S W sends draft recruitment brochure to the City.</li> <li>The City returns draft recruitment brochure (with edits) to S W.</li> <li>S W commences executive recruitment advertising and marketing.</li> <li>Online data collection and profile development.</li> </ul>	September 18 – October 31
Applicant screening and assessment and recommendation of semi-finalists.	<ul style="list-style-type: none"> <li>S W commences formal review of applications and sends most promising applicants a Candidate Questionnaire to provide additional information about background and experience. Candidates complete recorded interview online.</li> <li>S W completes formal review of applications and sends selected resumes and questionnaire responses to the City for review. Candidates' recorded interviews are also presented.</li> <li>Semi-finalists complete candidate management style assessment and responses are reviewed and interview questions are developed.</li> <li>S W meets with the City and recommends semi-finalists; the City selects finalists for on-site interviews.</li> </ul>	November 1 - 27
Comprehensive background check and reference checks completed for finalists.	<ul style="list-style-type: none"> <li>S W completes reference checks/background checks/ academic verification on finalists.</li> </ul>	By December 11
On-site Interviews with finalists.	<ul style="list-style-type: none"> <li>S W sends documentation for finalists to the City.</li> <li>The City conducts on-site interviews with finalists.</li> </ul>	December 12 – 14 or Week of December 17
Employment offer made / accepted.	<ul style="list-style-type: none"> <li>The City extends employment offer to selected candidate.</li> </ul>	By December 20

### III. Proposed Costs

The all-inclusive professional fee to conduct the recruitment is provided below and includes the cost of professional services by the Recruitment Project Team Leader, the project support staff and all project-related expenses such as advertising, preparation of the recruitment brochure, printing, candidate background, reference and academic verification checks and travel expenses for on-site visits. Travel expenses incurred by candidates for on-site interviews with the client are not the responsibility of S|W and are handled directly by the client organization.

The all-inclusive professional fee will be billed in four installments: 30% of the fee will be billed at the beginning of the recruitment; 30% at the implementation of Phase I; 30% at the implementation of Phase II; and 10% upon acceptance of an offer by the candidate. We are open to negotiate an alternative payment schedule if selected for this recruitment.

All questions regarding the professional fees and project-related expenses should be directed to Sharon Klumpp, Senior Vice President at [sklumpp@springsted.com](mailto:sklumpp@springsted.com) or via phone at 651-223-3053.

PHASE	DESCRIPTION OF PROFESSIONAL SERVICES	FEES
Phase I	Task 1 – Candidate Profile Development/Advertising/Marketing (includes one day on site by Recruitment Project Team Leader) Task 2 – Identify Quality Candidates	
Phase II	Task 3 – Screening of Applications and Submission of Recommended Semi-Finalists to Client (includes one day on site by the Recruitment Project Team Leader) Task 4 – Reference Checks, Background Checks and Academic Verifications	
Phase III	Task 5 – Final Process/On-Site Interviews with Finalists (includes two days on site by Recruitment Project Team Leader)	
Conclusion	Acceptance of offer by candidate	
<b>TOTAL ALL-INCLUSIVE PROFESSIONAL FEE</b>		<b>\$24,500</b>

OPTIONAL SERVICES FOR CONSIDERATION	FEES
At the City's option, S W will conduct a web-based survey to determine key community-wide issues and priorities that could be considered in the selection of a new City Manager. This survey is completed by community leaders, citizens, and City employees and would alter the project timeline.	<b>\$1,650</b>
At the City's option, S W will structure an Onboarding Program. This service runs through the first six months' after the candidate's effective date of employment.	<b>\$3,650</b>
On rare occasions, S W is asked to provide additional search services that are not included in this scope of service or to provide more than three on-site visits to the City. Additional work specifically requested by the City which is outside of the scope of this project will be invoiced at the hourly rate of \$220 plus expenses. S W will submit a written explanation of the additional services to be provided and the estimated hours that will be required prior to commencing any additional services.	<b>\$220 per hour plus expenses</b>

## Triple Guarantee

Our Triple Guarantee is defined as: (1) A commitment to remain with the recruitment assignment until you have made an appointment for the fees and tasks quoted in this proposal. If you are unable to make a selection from the initial group of finalists, S|W will work to identify a supplemental group until you find a candidate to hire. (2) Your executive recruitment is guaranteed for 24 months against termination or resignation for any reason. The replacement recruitment will be repeated with no additional professional fee, but only for project-related expenses. Candidates appointed from within your organization do not qualify for this guarantee. This guarantee is subject to further limitations and restrictions of your state laws. (3) S|W will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.

## IV. Firm Experience

### References

#### City of Rochester, Minnesota (Population 114,011)

**Ms. Linda Hillenbrand**, *Director of Human Resources*

507-328-2555

[lhillenbrand@rochestermn.gov](mailto:lhillenbrand@rochestermn.gov)

**Project:** Selection of City Administrator (2017)  
Selection of Police Chief (2018)

#### City of Denton, Texas (Population 123,009)

**Ms. Carla Romine-Hagmark**, *Human Resources Director*

940-349-8344

[Carla.romaine@cityofdenton.com](mailto:Carla.romaine@cityofdenton.com)

**Project:** Selection of Director of Technology Services (2014)  
Selection of Historic Preservation Officer (2015)  
Selection of Development Review Administrator (2015)  
Selection of City Manager (2016)  
Selection of City Auditor (2016)  
Selection of City Attorney (2018)  
Selection of City Engineer (2017)  
Selection of Chief Building Officer (2017)  
Selection of Chief Procurement Officer (2017)

#### City of Grand Rapids, Michigan (Population 192,294)

**Ms. Mari Beth Jelks**, *Director of Administrative Services*

616-456-4058

[mjelks@grand-rapids.mi.us](mailto:mjelks@grand-rapids.mi.us)

**Project:** Selection of City Manager (2018)  
Selection of Fire Chief (2016)

#### City of Brooklyn Park, Minnesota (Population 79,707)

**Honorable Jeffrey Lunde**, *Mayor*

763-242-1555

[Jeffrey.lunde@brooklynpark.org](mailto:Jeffrey.lunde@brooklynpark.org)

**Project:** Selection of City Manager (2015)  
Selection of Fire Chief (2018)

#### Alliance for Innovation

**Ms. Shannon Flanagan-Watson**, *Chair*

703-228-3911

[Sflanagan-watson@arlingtonva.us](mailto:Sflanagan-watson@arlingtonva.us)

**Project:** Selection of President/CEO (2018)

## Experience

The following is a partial list of previous Executive Recruitments:

<b>List of Relevant Executive Recruitments: 2013 to Present</b>				
<b>Year</b>	<b>Client</b>	<b>State</b>	<b>Recruitment</b>	<b>Population</b>
2013	Alexandria	MN	City Administrator	11,580
2013	Bayport	MN	City Administrator	3,496
2013	Bellevue	WI	Village Administrator	14,570
2013	Burnsville	MN	City Manager	61,434
2013	Clinton	NC	City Manager	8,676
2013	East Grand Forks	MN	City Administrator	8,602
2013	International Falls	MN	City Administrator	6,357
2013	Irving	TX	City Manager	238,289
2013	Justin	TX	City Manager	3,333
2013	Manassas	VA	Director of Finance and Administration	41,705
2013	Montgomery	MN	City Administrator	2,933
2013	Moose Lake	MN	City Administrator	2,787
2013	Muskegon	MI	City Manager	37,213
2013	Newport News	VA	City Manager	179,611
2013	Norwood Young America	MN	City Administrator	3,583
2013	Raleigh	NC	City Manager	423,179
2013	Sherburn	MN	City Administrator	1,128
2013	Watertown	MN	City Administrator	4,239
2013	West Saint Paul	MN	City Manager	19,708
2014	Atlantic Beach	FL	City Manager	12,864
2014	Bloomington	MN	City Manager	86,319
2014	Boone	NC	Town Manager	17,774
2014	Cape Charles	VA	Town Manager	990
2014	Castle Rock	CO	Town Manager	53,063
2014	Eustis	FL	City Manager	19,214
2014	Hutchinson	MN	City Administrator	13,871
2014	Irving	TX	City Manager	238,289
2014	Lakeville	MN	City Administrator	58,562
2014	Lexington	VA	City Manager	6,998
2014	Midlothian	TX	City Manager	19,891
2014	Narberth Borough	PA	Borough Manager	4,295
2014	Novi	MI	City Manager	123,099
2014	Oakdale	MN	City Administrator	27,780
2014	Springfield	MN	City Manager	2,114
2014	Township of Lower Merion	PA	Township Manager	59,850
2015	Bemidji	MN	City Manager	14,435
2015	Big Lake	MN	City Administrator	10,298
2015	Brooklyn Park	MN	City Manager	78,373
2015	Coon Rapids	MN	City Manager	62,103
2015	Cottage Grove	MN	City Manager	35,399
2015	Davidson	NC	Town Manager	11,750
2015	Diboll	TX	City Manager	5,323
2015	Golden Valley	MN	City Manager	20,845

### List of Relevant Executive Recruitments: 2013 to Present

Year	Client	State	Recruitment	Population
2015	Grand Junction	CO	City Manager	59,778
2015	Kingsville	TX	City Manager	26,312
2015	Manassas	VA	Deputy City Manager	41,705
2015	Monument	CO	Town Manager	5,817
2015	Sachse	TX	City Manager	22,026
2015	Scandia	MN	City Administrator	3,936
2015	Shakopee	MN	City Administrator	39,167
2015	Socorro	TX	City Manager	32,517
2015	Virginia Beach	VA	City Manager	448,479
2015	Warrenton	VA	Town Manager	9,862
2015	West Jordan	UT	City Manager	110,077
2015	Westminster	CO	City Manager	109,169
2015	Williamsburg	VA	City Manager	15,206
2016	Brooklyn Center	MN	Deputy City Manager	30,712
2016	Cary	NC	Town Manager	151,088
2016	Charter Township of Kalamazoo	MI	Township Manager	20,918
2016	Christiansburg	VA	Town Manager	21,533
2016	Circle Pines	MN	City Administrator	4,953
2016	Commerce	TX	City Manager	8,276
2016	Crested Butte	CO	Town Manager	1,519
2016	Deerfield Beach	FL	Assistant City Manager	78,041
2016	Denton	TX	City Manager	123,099
2016	Dumfries	VA	Town Manager	5,168
2016	Fredericksburg	VA	City Manager	28,132
2016	Greensboro	NC	Assistant City Manager	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Jersey Village	TX	City Manager	7,862
2016	Mankato	MN	Deputy City Manager	40,641
2016	Medford	OR	City Manager	77,677
2016	Mooreville	NC	Town Manager	34,887
2016	Moorhead	MN	City Manager	39,398
2016	Moose Lake	MN	City Administrator	2,787
2016	North Branch	MN	City Administrator	10,087
2016	Norwalk	IA	City Manager	9,639
2016	Roswell	NM	City Manager	48,611
2016	Shakopee	MN	Assistant City Administrator	39,167
2016	Virginia	MN	City Administrator	8,661
2016	Warsaw	VA	Town Manager	1,498
2016	Wayzata	MN	City Manager	4,217
2016	Williamsburg	VA	Assistant City Manager	15,206
2017	Berthoud	CO	Town Administrator	5,807
2017	Christiansburg	VA	Town Manager	21,533
2017	Cloquet	MN	City Administrator	12,050
2017	Commonwealth of Virginia	VA	Chief Administrative Officer	8,326,000
2017	Commonwealth of Virginia	VA	Chief Operating Officer	8,326,000
2017	Dickinson	TX	City Administrator	19,595
2017	El Dorado	KS	City Manager	12,852
2017	Glenview	IL	Village Manager	45,417
2017	Lake Havasu City	AZ	City Manager	53,743



List of Relevant Executive Recruitments: 2013 to Present				
Year	Client	State	Recruitment	Population
2017	Littleton	CO	City Manager	44,275
2017	Manassas Park	VA	City Manager	16,149
2017	Manatee County	FL	County Administrator	342,106
2017	Morehead City	NC	City Manager	9,203
2017	Mounds View	MN	City Administrator	12,525
2017	Oldsmar	FL	City Manager	13,913
2017	Orono	MN	City Administrator	8,009
2017	Riviera Beach	FL	City Manager	33,263
2017	Rochester	MN	City Manager	110,742
2017	Township of Roxbury	NJ	Township Manager	23,324
2018	Addison	TX	City Manager	15,368
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	82,881
2018	Belle Plaine	MN	City Administrator	6,838
2018	Christiansburg	VA	Town Manager	21,533
2018	Dallas	TX	City Secretary	1,258,000
2018	Grand Rapids	MI	City Manager	192,294
2018	Kingman	AZ	City Manager	29,029
2018	Maricopa	AZ	City Manager	46,903
2018	Shawnee	KS	City Manager	64,323
Current	Asheville	NC	City Manager	89,121
Current	Billings	MT	City Administrator	110,323
Current	Burnsville	MN	City Manager	61,434
Current	Greenville	SC	City Manager	61,397
Current	Middleburg	VA	Town Administrator	828

## V. Recruitment Project Team

### Recruitment Project Team Leader

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

Direct Phone: (651) 223-3053

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

**Mr. Art Davis**, Senior Vice President

Direct Phone: (816) 868-7042

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

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

Direct Phone: (214) 466-2436

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

**Ms. Patricia Heminover**, Senior Vice President

Direct Phone: (651) 223-3058

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

**Mr. Rollie Waters**, Special Advisor  
and Consultant

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

**Ms. Michelle Lopez**, Project Coordinator

Direct Phone: (651) 223-3041

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

**Sharon G. Klumpp**

*Sharon Klumpp and Consultant*

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

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

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

**Professional Accomplishments and Education**

***Education***

University of Kansas, Lawrence, Kansas  
Master of Public Administration  
Miami University, Oxford, Ohio  
Bachelor of Arts in Political Science

***Affiliations***

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

## **Charles A. (Chuck) Rohre**

*Executive Vice President/Manager of Executive Recruitment and Consultant*

---

Chuck Rohre is an Executive Vice President and the Manager of Springsted | Waters, the executive recruitment practice of the Springsted Group. Based in Dallas, he is responsible for managing and conducting executive recruitment engagements for the firm to insure their integrity, timeliness and adherence to budget parameters. He also directs the professional and support staff of the executive recruitment practice to ensure best practices, quality control and customer service. Chuck has more than 35 years of experience in managing and consulting in both the private and public sectors. He has served as Police Chief and Director of Public Safety for North Texas municipalities with populations ranging from 9,000 to 200,000 plus. Prior to beginning his consulting career, Mr. Rohre served for three years as Police Chief of Plano, Texas.

Chuck joined the firm in January 2006 following a 13-year engagement with another nationally recognized public sector search firm where he managed the Texas and Southwestern operations. He has an extensive and successful track record of completed recruitments across the nation, especially in Texas, Colorado, Arizona, and the Midwestern states. He has led over 350 recruitment engagements in 24 states for key executives such as City and Assistant City Managers, Police Chiefs, Fire Chiefs, Library Directors, Chief Information Officers, City/County Attorneys, Parks & Recreation Directors, Finance Directors and Public Works Directors, as well as Executive Directors of not for profit and quasigovernmental organizations. The clients range from as small as 2,500 to as large as 1,300,000 in population. He has also conducted management consulting assignments in a number of disciplines including public safety, career development and strategic planning. He has written and presented training in a variety of subject areas including personnel assessment, leadership and management skills, and career development for public sector employees. He has earned the designation of Certified Behavior Analyst by TTI, Inc.

### ***Areas of Expertise***

- Executive Recruitment
- Background Investigations
- Behavioral Analysis
- Career Development
- Strategic Planning
- Organizational Assessment

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

Chuck received his bachelor's degree from the Dallas campus of Abilene Christian University and his Master's degree in Human Relations and Management from the same institution.

He has completed advanced management training at the Institute for Law Enforcement Administration in Plano and now serves on its adjunct faculty and advisory board. Chuck completed the Federal Bureau of Investigation's prestigious LEEDS course at Quantico, Virginia. He is a veteran of the United States Army, serving in the United States and the Republic of Vietnam.

## **Rollie Waters**

### *Executive Vice President and Special Advisor – Consultant*

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Rollie Waters is an Executive Vice President and Special Advisor – Consultant to Springsted | Waters. He serves as an Executive Vice President of Springsted | Waters and also advises on selected assignments and utilization of proprietary candidate assessment instruments. Since 1976, Rollie has been a management consultant to private and public sector clients. He has consulted with national and international clients in the area of HR Management system design and strategic management. He has given various lectures and seminars for organizations in the areas of compensation as it relates to performance management. He is viewed on a national level as one of the foremost authorities in succession planning and performance management system design for the public sector. He has spoken before such organizations as the International City/County Managers Association, American Management Association, The Alliance for Innovation, National Forum of Black Public Administrators, California Institute of Technology, the Texas Municipal League (TML), and the International Personnel Management Association (IPMA-HR), among others.

Rollie has been actively involved in the development of competency-based knowledge selection and development tools over the past twenty years. He has been instrumental in ensuring the proprietary profiles that he has designed to attract the right candidates that fit the client organization's needs. Rollie has been widely published in national journals and magazines focusing on human resource challenges.

#### ***Areas of Expertise***

- Executive Recruitment
- Web-Based Compensation Support
- Management Development
- Competency-based Systems and Development Systems
- Organizational Strategy
- Mentoring Programs
- Performance Management
- Succession Planning

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

Rollie received his MBA at Pepperdine University and his Bachelor of Science degree in Psychology from the University of South Carolina.

He is a Strategic Partner with the International City/County Managers Association, International Management Consultants and Alliance for Innovation, a member of the National Corporation Advisory Council of the National Forum for Black Public Administrators, and numerous other professional groups. Rollie has an extensive background in the behavioral sciences and strategic planning. In addition, he is a Certified Management Consultant (CMC) awarded by the Institute of Management Consultants USA.

## **Arthur (Art) Davis**

### *Senior Vice President and Consultant*

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Arthur (Art) Davis is a Senior Vice President and Consultant with Springsted | Waters. Prior to joining S|W, Art successfully launched and expanded his own company over the course of 10 years. Art specializes in providing executive recruitment and organizational management consulting services for cities, counties and nonprofits.

Prior to consulting, Art served as Associate Director for the Civic Council of Greater Kansas City, a nonprofit, 501c4 membership organization comprised of CEOs representing some of the largest companies in the region. One of his responsibilities during his tenure at the Civic Council was to organize efforts to revitalize Downtown Kansas City, Missouri. Art coordinated a strategic and master planning process involving hundreds of stakeholders, which resulted in the establishment of development of strategies, solicitation of start-up funding and implementation of action plans – all contributing toward the successful revitalization of Downtown Kansas City.

For nearly six years, Art served as City Administrator of Lee’s Summit, Missouri, a city recognized as the “fastest growing” city in Missouri and the Greater Kansas City region at the time. Earlier positions of responsibility include working for the cities of Lenexa, Kansas and Dallas, Texas, where he served as Assistant to the Mayor of Dallas.

### ***Areas of Expertise***

- Executive Recruitment
- Leadership/Management Development
- Strategic Goal Setting & Strategic Planning
- Organizational Assessment, Design & Development
- Organization & Community Facilitation

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

Art received his Bachelor of Arts degree in political science and public administration from William Jewell College and his Master of Public Administration from the University of Kansas.

He has led and participated in a wide variety of community initiatives and served on nonprofit boards throughout his career. Art was presented with the L.P. Cookingham Award by the Greater Kansas City Chapter of the American Society for Public Administration, recognizing his long-term and outstanding contributions in the field of public administration.

**Patricia (Patty) Heminover**

*Senior Vice President and Consultant*

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Patty Heminover is a Senior Vice President and Consultant with Springsted | Waters. She has 19 years of public education experience. Prior to joining S|W she was a Client Representative for Springsted Incorporated for seven years. She has also served as superintendent of South St. Paul Schools in South St. Paul, Minnesota. Patty brings considerable experience identifying management talent, leading organizational and process improvements, and developing and administering budgets.

Patty has facilitated discussions with legislators at the state level regarding education funding, securing \$1 Million of new funding for South St. Paul Schools. Her understanding of human resources and finance and her experience working with governing boards comes from having served seven years as the South St. Paul Schools’ Director of Human Resources and Finance, prior to serving as the district’s superintendent. She also served for three years as the co-superintendent of schools for Cleveland Public Schools in Cleveland, Minnesota, after working as its Director of Human Resources and Business Services for six years.

**Professional Accomplishments and Education**

*Education*

Minnesota State University, Mankato, Minnesota  
Master of Education, Administration

Minnesota State University, Mankato, Minnesota  
Bachelor of Science in Consumer Science,  
Business Administration

University of Saint Thomas, Saint Paul, Minnesota  
Mini MBA Program, Human Resources  
Management

*Affiliations*

Minnesota Association of School Administrators  
American Association of School Administrators  
Minnesota Association of School Business Officials  
River Heights Chamber of Commerce, Member  
State Negotiators Association

*Certifications*

Human Resource Certificate, University of St. Thomas  
Superintendents Licensure, State of Minnesota  
Minnesota School Board Association

Patty has received a School Finance Award, technology leadership awards and helped establish the first K-12 International Baccalaureate School District in Minnesota.

**Michelle Lopez***Project Coordinator*

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Ms. Michelle Lopez is a Project Coordinator with Springsted | Waters, providing assistance in the organizational management of executive recruitments. Her responsibilities include conducting research, organizing work flow, coordinating information and resources, and assisting candidates and clients throughout all phases of an executive recruitment.

***Professional Accomplishments***

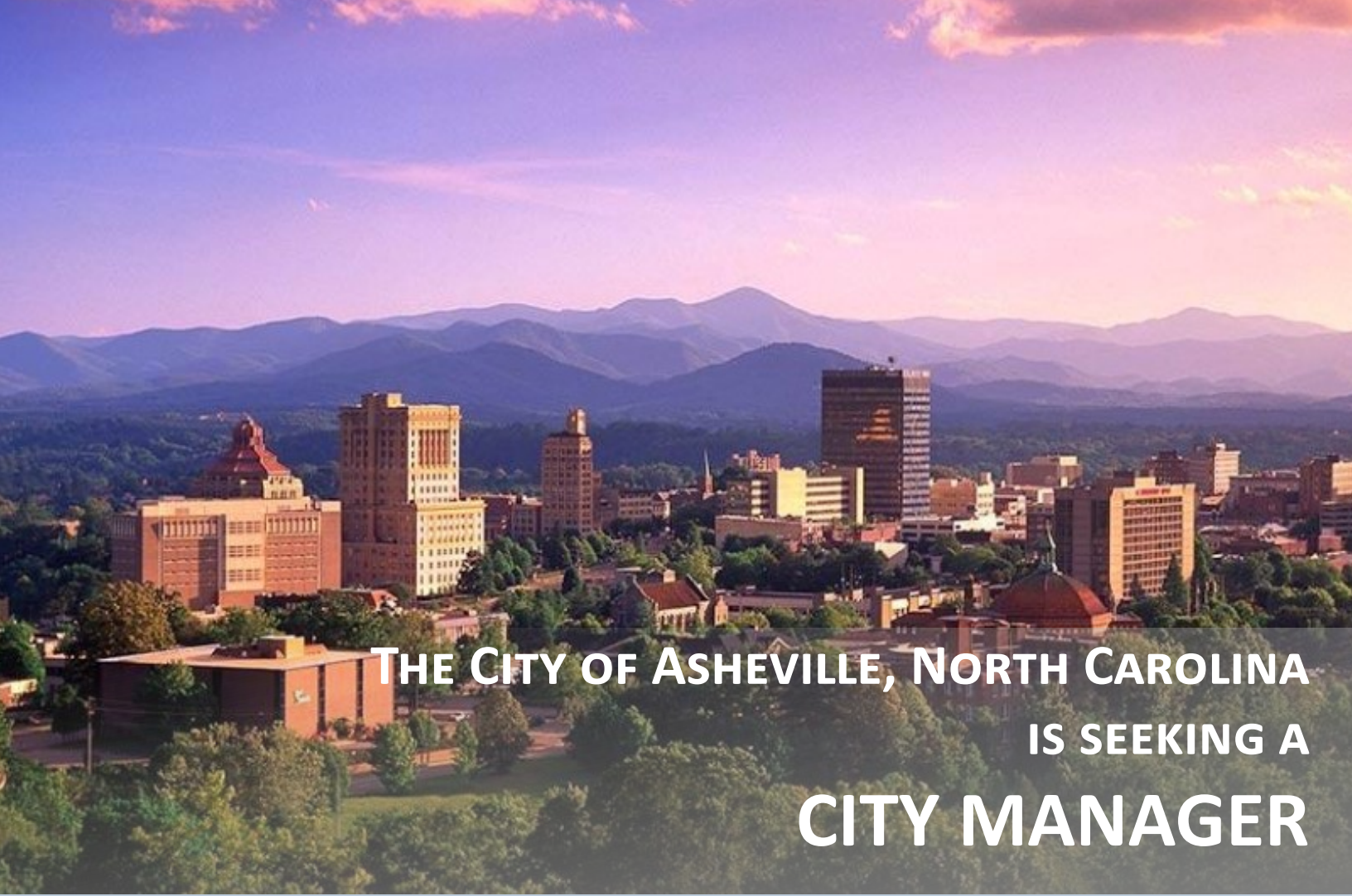
Before joining the S|W team, Michelle was the Client Development Specialist for Springsted's Public Finance and Public Education Client Representatives where she handled marketing, research and client outreach. Michelle has over ten years of experience supporting multiple departments, including human resources at Target Headquarters in Minneapolis and University of Minnesota Fairview.

***Education***

Michelle has an Associate in Arts, Liberal Arts degree from Minneapolis Community College, Minneapolis, Minnesota.

**APPENDIX I**  
**Sample Brochure**





# THE CITY OF ASHEVILLE, NORTH CAROLINA IS SEEKING A CITY MANAGER

## ABOUT THE CITY

Nestled between the Blue Ridge and Great Smoky Mountains at the confluence of the Swannanoa River and the French Broad River, the City of Asheville is a vibrant community and regional hub for Western North Carolina. With an area of 45.5 square miles, it is the tenth largest city in the state, with a population of 91,929. Asheville's estimated daytime population grows to over 150,000, reflecting people who come to the city for work, services and leisure. Over the next five years, growth is projected to increase by 16,000.

Asheville also serves as the county seat for Buncombe County. The city is accessible by Interstates 40, 240, and 26. Air travel is available through the Asheville Regional Airport in nearby Fletcher, North Carolina.

The city's natural and architectural beauty, moderate climate, strong job market and outstanding education and health care facilities have consistently led to its ranking as one of the best places to live, work, visit and retire in the United States. Asheville is listed as one of the 2018 Best Livable Communities by Livability.com and as one of CNN Travel's 18 Best Places to Visit in 2018.

Asheville's lively arts scene and plentiful recreation opportunities make the city a popular venue for tourists. Major attractions include the dome-topped Basilica of Saint Lawrence and the vast 19th-century Biltmore Estate displaying artwork by renowned masters. The Downtown Art District is filled with galleries and museums, and in the nearby River Arts District, former factory buildings house artists' studios.

The City's economy is diverse with strong representation in health care, education, retail trade and tourism. The largest employers are Mission Hospital, the Buncombe County Schools System, Ingles Market and various federal, state and local government agencies. Tourism generates over 10.9 million visitors annually.

## THE CITY OF ASHEVILLE GOVERNMENT

The City of Asheville recognizes that complex local government operations require strong political leadership, policy development, a relentless focus on execution and results, a commitment to transparent and ethical government, and a strategy for representing and engaging every segment of the community.

Operating under the council-manager form of local government, the Asheville City Council consists of a mayor and six council members who serve as the policy-making and legislative authority for the city. The City Council is elected on a nonpartisan basis. Council members serve four-year staggered terms. The Mayor is elected to serve a four-year term. The Council is responsible for establishing a vision for the city, adopting the budget and levying a property tax on both real and personal properties located within its boundaries. The Council also appoints the city manager, city attorney and city clerk.

The City provides a full range of services, including police and fire protection, the construction and maintenance of streets and other infrastructure, solid waste and water services, recreational activities and cultural events. For fiscal year 2018-2019, the City has an operating budget of \$180 million and a staff of 1,248 employees. The City of Asheville has a strong financial position as indicated by two AAA ratings assigned to the City's general obligation debt. Voter approval of a five-year, \$74 million bond issuance in 2016 is providing financing for a variety of capital improvement projects, over and above the City's annual average capital improvement program of \$200 million.



## THE CITY MANAGER

The City Manager is appointed by and reports to the City Council. The position is responsible for implementing council policies, upholding and enforcing city ordinances, and managing the daily operations of the city. The City Manager directs and works in collaboration with a team of two assistant city managers and 16 department heads to plan for and provide the smooth and efficient delivery of services to all Asheville residents and businesses. The City Manager also plays a significant role in working collaboratively with the County, building public/private partnerships and engaging citizens to address community issues.

The City Manager:

- Works with and engages elected officials as they develop policies, establish a long-range vision for the City and identify service priorities.
- Informs the City Council of departmental operations by generating reports on the affairs of the City and advising on financial conditions and needs.
- Ensures that laws and policies approved by elected officials are equitably enforced throughout the city.
- Evaluates and develops recommendations for programs indicating scope, cost and impact for consideration by the City Council.
- Prepares the annual budget, submits it to elected officials for approval and implements it once approved.
- Appoints and directs department heads and supervises other employees who are responsible for day-to-day operations.
- Ensures customer service efficiency and effectiveness.

## EDUCATION AND EXPERIENCE

Bachelor's degree in Public Administration or related field, Master's preferred, with at least ten (10) years of responsible, high-level managerial experience in a complex organization or an equivalent combination of education and experience.

The ideal candidate must demonstrate a record of successful leadership in executing strategic goals, managing organizational performance, transparent communications, prudent financial management, building effective community partnerships, and engaging citizens. Experience managing rapid growth in a city with significant architectural structures and a thriving tourism industry is a plus. Familiarity with Dillon's Rule preferred.



## DESIRED CAPABILITIES AND TRAITS

The ideal candidate will be an inspiring, innovative and visionary leader with a genuine concern and interest in all who call Asheville "home." The candidate will value and consistently demonstrate accountability, transparency and a commitment to working with the City Council and staff to provide quality public services and maintain the City's strong fiscal position. The successful candidate will be intentional, present and highly visible within the City organization and the community it serves.

Qualified candidates will have a track record of building effective partnerships and teams and engaging the public to seek different points of view. The candidate will be an outstanding communicator who is diplomatic, measured and skilled in navigating the political environment without becoming political. The candidate will also:

- Foster a positive, innovative organizational culture that engages and empowers employees
- Be open to progressive ideas and provide analysis and insight on future impacts and considerations
- Possess a conservative fiscal mindset balanced with empathy for community needs
- Develop objective and impartial working relationships with all City Council members
- Communicate fully and share timely information with the City Council
- Keep the City focused on adopted priorities
- Exert confidence and display the fortitude to say no
- Build a leadership team with shared values and clear expectations
- Be adept at effectively managing outcomes and relationships

## STRATEGIC LEADERSHIP OPPORTUNITIES

**Operational sustainability.** Establish priorities to ensure a high level of core services for all areas of the City and continued City-wide infrastructure funding. Provide fiscal stewardship to balance core services and progressive initiatives.

**Community-police relations.** Embrace the tenets of 21st century policing, build trust between the community and the police and strengthen the relationship between City Hall and the Police Department.

**Affordable housing.** Collaborate with policy-makers, community organizations, non-profits, business groups and developers to implement strategies to increase the availability of affordable housing.

**Strategies for smart growth.** Identify emerging practices and strategies to limit gentrification, address related transportation and infrastructure needs and plan for growth that is sensitive to existing neighborhoods.

**Equity and social justice.** Ensure that the delivery of City services and programs are viewed through an equity and social justice lens.

**Organizational review.** Assess organizational structure and processes to increase effectiveness and efficiency and challenge the organization to continuously improve services. Ensure overall coordination of planning consistent with the City's vision.

**Council-Manager relationship.** Engage the City Council and bring clarity to roles and relationships and ways the City Manager can support the City Council in exercising its policy-making and oversight roles.

## COMPENSATION AND BENEFITS

The City of Asheville offers a competitive salary commensurate with experience and a comprehensive benefits package including relocation for a successful out-of-area candidate; 401(k) contribution; Local Government Employee Retirement System (LGERS) contribution; and life, health and dental insurance.



## APPLICATION AND SELECTION PROCESS

Qualified candidates please submit your cover letter and resume online by visiting our website at <https://springsted-waters.recruitmenthome.com/postings/2031>. This position is open until filled; first review of resumes occurs on August 1.

Following this date, applications will be screened against criteria outlined in this brochure. On-site interviews will be offered to candidates named as finalists, with reference checks, background records checks, including credit history, and academic and employment verifications conducted after receiving candidates' consent. For more information, please contact Sharon Klumpp at [sklumpp@springsted.com](mailto:sklumpp@springsted.com) or by calling 651-223-3053 (office) or 651-270-6856 (mobile).

Visit <http://www.ashevillenc.gov> for more information about the City of Asheville.

The City of Asheville is an Equal Opportunity Employer.



14285 Midway Road,  
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Addison, TX 75001

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Fax: 972-480-1951

380 Jackson Street  
Suite 300  
Saint Paul, MN 55101

Phone: 651-223-3000  
Fax: 651-223-3002

Serving

LOCAL GOVERNMENT  
& ORGANIZATIONS





# PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

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CITY MANAGER – NORMAN, OKLAHOMA

August 2018

**Strategic** Government Resources

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

Ron Holifield, CEO  
Ron Holifield Cell: 214-676-1691  
[Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)

Chuck Sparks, COO (Binding Official)  
[ChuckSparks@GovernmentResource.com](mailto:ChuckSparks@GovernmentResource.com)





August 20, 2018

Gala Hicks, Director of Human Resources  
City of Norman, Oklahoma  
[Gala.Hicks@normanok.gov](mailto:Gala.Hicks@normanok.gov)

Dear Ms. Hicks:

Thank you for the opportunity to submit this proposal to assist the City of Norman in your search for a new City Manager.

SGR has the unique ability to provide a personalized and comprehensive recruitment to meet your needs. I would like to draw your attention to a few key items that distinguish SGR from other recruitment firms:

- SGR has over 58,000 email subscribers to my weekly “10 in 10 Update on Leadership and Innovation” e-newsletter.
- SGR will send targeted emails to our database of over 3,900 city management officials.
- SGR’s website, where this position would be posted, receives over 36,000 local government official visitors each month, with over 75,000 page hits per month – more than any other local government search firm website in the nation.
- SGR’s job board (a separate website), where this position would also be posted, is the 2<sup>nd</sup> largest local government job board in the nation, with over 16,000 local government job seeker visitors each month, and over 1,800 jobs listed at any given time.
- SGR is the only search firm with a social media expert on staff, who provides a comprehensive social media marketing campaign that includes email, Facebook, Twitter, Instagram, and LinkedIn.

No other firm can touch our reputation for being trusted by both clients and candidates. We are truly excited about the prospect of doing this recruitment for the City of Norman. I look forward to discussing in more detail how we can help you select an exceptional City Manager, and we are available to visit in person with you at your convenience.

Respectfully submitted,

Ron Holifield, Chief Executive Officer  
Strategic Government Resources

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**TAB 1**

## **Company Contact Information**

### *Strategic Government Resources*

#### **Contact Information for Binding Official**

---

Chuck Sparks, Chief Operating Officer

Address: P.O. Box 1642, Keller, TX 76244  
Office: 817-337-8581  
Fax: 817-796-1228  
Email: [ChuckSparks@GovernmentResource.com](mailto:ChuckSparks@GovernmentResource.com)  
Website: [www.governmentresource.com](http://www.governmentresource.com)

#### **Alternate Contact**

---

Ron Holifield, Chief Executive Officer

Address: P.O. Box 1642, Keller, TX 76244  
Cell: 214-676-1691  
Office: 817-337-8581  
Fax: 817-796-1228  
Email: [Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)  
Website: [www.governmentresource.com](http://www.governmentresource.com)



**TAB 2**

# COMPANY PROFILE

## Background

Strategic Government Resources (SGR) was founded in 1999 and is fully owned by former City Manager Ron Holifield. Ron spent two high-profile decades in city management, which included service as City Manager in several cities. He founded SGR for the express purpose of helping local governments be more successful by recruiting, assessing, and developing innovative, collaborative, authentic leaders. We specialize in executive recruitment, live training, online training, leadership development, assessments, consulting, and various other services geared to promote innovation in local governments.

## Mission & Core Values

SGR’s mission is to facilitate innovative leadership in local government. The simple fact is that in today’s world of limited resources, local governments must innovate to survive. SGR has been, and continues to be, a leader in spurring innovation in local government.

SGR’s core values are:

- Customer Service
- Integrity; Philanthropy
- Continuous Improvement
- Flexibility
- The Golden Rule
- Collaboration
- Protecting Relationships.

## Office Locations

SGR’s corporate headquarters is in **Keller, Texas, in the Dallas/Fort Worth Metroplex**. SGR also has virtual offices in:

<b>Florida</b> Kissimmee Lakeland	<b>Missouri</b> Gladstone	<b>Pennsylvania</b> Philadelphia	<b>Texas (cont’d)</b> Granbury Greenville
<b>Georgia</b> Savannah	<b>North Carolina</b> Mooresville	<b>Texas</b> Abilene Arlington Coppell Corpus Christi Forney	Lubbock Murchison North Richland Hills Richardson Sugar Land Tyler
<b>Massachusetts</b> Boston	<b>Oklahoma</b> Stillwater		

## **Executive Recruitment Team**

- Ron Holifield, Chief Executive Officer
- Melissa Valentine, Managing Director of Recruitment and Human Resources
- Leigh Corson, Talent Research Manager
- Muriel Call, Research Manager
- Delena Franklin, Lead Recruitment Coordinator
- Becky Welch, Recruitment Coordinator
- Courtney Ware, Recruitment Coordinator
- Andra Henson, Research Specialist
- Doug Thomas, Senior Vice President
- Cindy Hanna, Senior Consultant
- Bill Peterson, Senior Vice President
- Bob Turner, Senior Vice President
- David Leininger, Senior Vice President
- Gary Holland, Senior Vice President
- Ken Wiegand, Senior Vice President
- Kirk Davis, Senior Vice President
- Kurt Hodgen, Senior Vice President
- Larry Bell, Senior Vice President
- Larry Boyd, Senior Vice President
- Larry Gilley, Senior Vice President
- Lissa Barker, Senior Vice President
- Margie Rose, Senior Vice President
- Mike Tanner, Senior Vice President
- Ron Robinson, Senior Vice President
- Tommy Ingram, Senior Vice President

**TAB 3**

## UNIQUE QUALIFICATIONS

### Marketing and Networking

- SGR's 10 in 10 Update on Leadership and Innovation e-newsletter, where all recruitments conducted by SGR are announced, reaches over 58,000 subscribers.
- SGR has an opt-in subscriber database of over 3,900 city/county management officials.
- SGR has formal collaborative partnerships with:
  - League of Women in Government (LWG)
  - Florida City and County Management Association (FCCMA)
  - Louisiana Municipal Association (LMA)
  - Missouri Municipal League (MML)
  - Oklahoma Municipal League (OML)
  - City Management Association of Oklahoma (CMAO)
  - National Public Employers Labor Relations Association (NPELRA)
  - Texas Fire Chiefs Association (TFCA)
- SGR conducts over 320 live training classes each year on average, and we currently serve over 23,000 local government employees in our Learning Management System (LMS).
- SGR has 544 local government clients in 47 states for our recruitment, training, and leadership development business lines combined.

Our recruiters have years of experience in local government and both regional and national networks of relationships. The entire 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 both local government organizations and professional associations. Many SGR team members frequently speak and write on issues of interest to local government executives. Only SGR can work all of the relevant networks as a peer and insider, resulting in better recruitment, better investigation, better intelligence, better information, and better final decisions.

### Comprehensive Needs Assessment

SGR's executive recruiting services are unequalled. Our role is to find the candidate who is the best match for your organization. SGR devotes a tremendous amount of energy to understanding your organization's unique culture, environment, and local issues to ensure a great "fit" from values, philosophy, and management style perspectives.

Finding qualified candidates is not difficult; the hard part is finding qualified candidates who are the right fit for your organization. A leading-edge candidate and a safe harbor candidate often look the same on paper, but will have profoundly different impacts on your organization.

**Accessibility**

Your executive recruiter is accessible at all times throughout the recruitment process and can be reached by candidates or clients, even at night and on weekends, by cell phone or email.

**Responsive to You**

If a problem arises, or if you have questions, you can count on SGR staff to be available, prepared, and prompt.

**Trust of Candidates**

SGR has a track record of remarkable confidentiality and providing wise counsel to candidates and next generation leaders; we have earned their trust. As a result, SGR is typically able to get exceptional prospects to become candidates, even if they have declined to become involved in other recruitment processes, because candidates trust SGR to assess the situation well, communicate honestly and bluntly, and maintain their confidentiality.

**Listening to Your Unique Needs**

SGR is more interested in listening than in talking. Some firms depend on their tried and true stable of reliable candidates. These firms do not really need to listen to the client because the recruitment will result in the same list of finalists, no matter the type of information they receive from the client. SGR devotes tremendous energy to actively listening to your organization and helping you define and articulate your needs. SGR does not just go through the motions and then provide you with a list of qualified names from a stable of regulars. We work hard to conduct a comprehensive recruitment that is unique to you.

**Recorded Online Interviews with Candidates**

SGR's unique online recorded interview process allows the search committee to see candidates in an interview setting prior to the finalist stage of the recruitment process, and without having to pay travel expenses.

**Comprehensive Media Reports**

One of the worst things that can happen for your organization is to be surprised by undisclosed information about a finalist, especially if the surprise comes in the form of a newspaper article that is found by your critics. SGR produces a comprehensive media search report on each finalist candidate. Each Media Report is compiled from information gathered using our proprietary online search process. This is not an automated process and produces far superior results than a standard Google search which is typically utilized by other recruitment firms. The report length may be as long as 350 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. No other firm provides such comprehensive media reports.

**Psychometric Assessments**

SGR uses the DiSC Management Profile psychometric assessment to provide a detailed understanding of how candidates will lead and manage an organization. The DiSC assessment report also provides valuable information regarding candidates' strengths and weaknesses.



### **Equal Opportunity Commitment**

SGR strongly believes in equal opportunity. SGR does not discriminate and is careful to follow both the letter and the spirit of laws regarding equal employment opportunities and non-discrimination. More importantly, however, SGR believes that equal opportunity is an ethical issue. SGR quite simply will not enter into an engagement with an entity or organization that directs, or expects, that bias should, or will be, demonstrated on any basis other than those factors that have a bearing on the ability of the candidate to do the job. You can anticipate that SGR will make a serious and sincere effort to include qualified women and minority candidates in the finalist pool. Although SGR obviously cannot, and would not, guarantee the makeup of the finalist group, SGR does have relationships and contacts nationwide to encourage the meaningful participation of women and minority candidates.

### **Value**

For a variety of reasons that are detailed in this proposal, SGR will provide the most cost-effective executive recruitment for your organization. Some firms low ball their price, and make up for it by reducing the amount of time they commit, or charging extra for additional time required. SGR gives you a fixed price, and we are with you until the end of the process regardless of how many hours are required.

### **Service Guarantee**

SGR provides the strongest guarantee in the industry.

1. You always have 24/7 cell phone and email access to the executive recruiter and SGR's CEO.
2. If you do not find the right candidate, we will start the process over with no additional professional fees.
3. If we place a candidate, who we have fully vetted through the SGR recruitment process, who stays less than 18 months, we will conduct the recruitment again with no additional professional fees. If the organization circumvents SGR's recruitment process and selects a candidate that did not participate in the full recruitment process, this guarantee is null and void.
4. If we place a candidate with you, we will not directly solicit them for another job.

**TAB 4**

## **KEY PERSONNEL FOR THIS RECRUITMENT**

### **Kristin Navarro, Director of Business Development and Recruitment**

Kristin Navarro joined SGR's recruitment team in 2016. She is a recruiter for full service and component searches and has also served as a facilitator for SGR live training classes.

Kristin previously worked for the City of Fort Worth where served as the Senior Strategic Business Analyst and was a part of the Management Team for the City's Finance Department. Prior to joining Fort Worth, Kristin served the Town of Trophy Club in their Budget Office.

Kristin holds a Bachelor of Arts in Political Science and a Master of Arts in Public Administration from The University of North Texas. Additionally, Kristin is a Certified Government Finance Officer and is also an active member of the Government Finance Officers Association (GFOA), the Government Finance Officers Association of Texas (GFOAT), Urban Management Assistants of North Texas (UMANT) and ELGL.

### **Ron Holifield, CEO**

Ron Holifield served almost two decades in City Management, including Assistant City Manager in Plano, Texas, as well as City Manager in Garland, DeSoto, Farmersville and Sundown, and on the City Manager's staff in Lubbock. In 1996, he left city management and purchased Government Relations Specialists, where he provided strategic marketing consultation for many of the leading corporations in America, including Space Imaging, American Express, IBM, Xerox and over 50 other Fortune 500 companies, as well as NASA. In 1999, Ron sold that company and founded Strategic Government Resources to specialize in Recruiting, Assessing and Developing Innovative, Collaborative, Authentic Leaders for local governments nationwide.

Today, Ron speaks at over 50 state and national conferences and workshops each year and remains high profile in the city management profession. SGR is the third largest local government executive search firm in the nation, operates the second largest local government job board in the nation, and provides live and online leadership development to more local government executives and midlevel managers than any other company in the nation.

Ron holds a Bachelor of Arts in Government from Abilene Christian University and a Master of Public Administration from Texas Tech University.

**TAB 5**

## **PROJECT METHODOLOGY**

Each executive recruitment service is tailored to meet the client's specific needs. A full-service recruitment typically entails the following:

### **1. Organizational Inquiry and Analysis**

- Develop Project Plan and Timeline
- Individual Interviews with Search Committee / Key Personnel / Community Leaders (if desired)
- Development of Position Profile and Professional Production of Brochure

### **2. Advertising and Recruitment**

- Ad Placement
- Social Media and Marketing of Position

### **3. Initial Screening and Review**

- Management of Applications
- Evaluation of Resumes
- Search Committee Briefing to Facilitate Selection of Semifinalists

### **4. Evaluation of Semifinalist Candidates**

- Written Questionnaire
- Recorded Online Interviews
- Media Search Stage 1
- Semifinalist Briefing Books
- Search Committee Briefing to Facilitate Selection of Finalists

### **5. Evaluation of Finalist Candidates**

- Comprehensive Media Search Stage 2
- Comprehensive Background Investigation Report
- DiSC Management Assessment (supplemental service, if desired)
- Finalist Briefing Books
- Press Release (if desired)
- Stakeholder Engagement (if desired)

### **6. Interview Process**

- First Year Game Plan (if desired)
- Conduct Interviews
- Deliberations
- Reference Checks

### **7. Negotiations and Hiring Process**

- Determine the Terms of an Offer
- Negotiate Terms and Conditions of Employment

### **8. Post-Hire I-OPT Team Building Workshop (supplemental service, if desired)**

## **Step 1: Organizational Inquiry and Analysis**

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In the Organizational Inquiry and Analysis Stage, 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.

### **Outline Project Plan and Timeline**

SGR will meet with the client at the outset of the project to finalize the recruitment plans and timeline. At this time, SGR will also request that the client provide additional information about the community, organization, and position. Information requested will include general information and available resources about the community, school district, economic vitality, political leadership, organization, strategic plan, governing body goals and objectives, budget information, major projects, job description, salary range, benefits package, etc.

### **Individual Interviews with Search Committee and Key Personnel (if desired)**

Fully understanding your organizational needs is the most critical part of conducting a successful executive recruitment. SGR conducts individual interviews with the Search Committee, key staff, and/or direct reports to find out more about the position, special considerations, and the political environment. These interviews last approximately 30 minutes to one hour each and identify individual issues that may affect the dynamics of the recruitment, as well as develop a composite understanding of the organization's preferences. This process helps with organizational buy-in and will assist us in developing the Position Profile as we look for any significant staff issues or major disconnects that may not otherwise be apparent.

### **Development of Position Profile Brochure**

Following the individual interviews and internal analysis, SGR will develop a draft Position Profile Brochure that is reviewed and revised in partnership with your organization until everyone agrees it accurately reflects the sought-after leadership and management characteristics. A sample brochure is included with this proposal document.

## **Step 2: Advertising and Recruitment**

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The Advertising and Recruitment stage includes ad placements, email distribution of the Position Profile, responding to inquiries about the position, and ongoing communication with applicants and prospects.

### **Ad Placement / Social Media and Marketing of Position**

The Executive Recruiter and client work together to determine the best ways to advertise and recruit for the position. Ads are typically placed in various state and national publications, targeting the most effective venues for reaching qualified candidates for that particular position.

SGR's preferred strategy is to rely on email distribution of the Position Profile Brochure to key opinion leaders and potential prospects across the country. The position will be announced in our "10 in 10" e-newsletter, which reaches over 58,000 local government professionals, in

addition to a targeted email announcement to specific professional categories and/or areas of the country. By utilizing an email distribution strategy, these brochures tend to “get legs” of their own, resulting in a very high penetration rate at minimal cost.

SGR will utilize Facebook, Twitter, personal phone calls, personal emails, LinkedIn, Instagram, and Pinterest to promote the position. This communication is both to solicit high potential candidates and to encourage key local government professionals to share information within their professional circles.

### **Ongoing Communication with Applicants and Prospects**

SGR communicates with all applicants on a frequent and ongoing basis to ensure applicants stay enthusiastic about the opportunity. 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 organization, and it is an area in which SGR excels. SGR also utilizes Google Alerts for each client organization and provides updates to our Executive Recruiters and applicants of any references made regarding the client organization in various media outlets.

### **Step 3: Initial Screening and Review**

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This stage of the executive recruitment involves managing the flow of resumes, and screening and evaluating resumes.

#### **Management of Applications**

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.

#### **Evaluation and Triage of Resumes**

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 make sure that the minimum requirements of the position are met, and which of the preferred requirements are met. This sifting process assesses how well candidates’ applications fulfill the recruitment criteria outlined in the Position Profile.

## **Search Committee Briefing / Selection of Semifinalist Candidates**

At this briefing, SGR will provide a comprehensive progress report via PowerPoint presentation and will facilitate the selection of approximately 8-12 semifinalists. The presentation will include summary information on the process so far, the candidate pool overall, and any trends or issues that have arisen, as well as a briefing on each candidate and their credentials. No other firm offers this level of reporting detail and transparency.

## **Step 4: Evaluation of Semifinalist Candidates**

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Reviewing resumes is an important and valuable step in the executive recruitment process. However, the simple fact is that resumes can be misleading. They tell you nothing about the individual's personal qualities or his/her ability to get along with other people. Resumes can also exaggerate or inflate accomplishments or experience. SGR's responsibility is to go more in-depth than the resume to ensure that those candidates who continue in the process are truly outstanding.

### **Personal Interaction with Semifinalist Candidates**

SGR's goal is to have a clear understanding of the person behind the resume and what makes him/her an outstanding prospect for you. The evaluation of semifinalist candidates includes follow-up by phone when appropriate to ask any questions about underlying issues.

### **Written Questionnaire**

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 about 20 questions focusing on 5-6 key areas of particular interest to the client. This written instrument will be included in the semifinalist briefing book along with the cover letters and resumes.

### **Recorded Online Interviews**

SGR offers recorded online videos of candidates answering pre-recorded questions. This provides a very insightful, efficient and cost-effective way to gain additional insights to utilize in selecting finalists you want to come in for live interviews. The 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. Online interviews are emailed to the Search Committee for viewing prior to selection of finalist candidates.

### **Media Search Stage 1**

Stage 1 of our media search involves a comprehensive review of all newspaper articles on the candidate in major news outlets within the previous two years. These media reports at the semifinalist stage have proven helpful by uncovering issues that were not previously disclosed



by prospective candidates. The Executive Recruiter will communicate any “red flags” to the Search Committee immediately upon discovery.

### **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 will include written questionnaires, online interviews, and any additional information obtained about the candidate. The purpose of this briefing is to facilitate narrowing the list to 4-6 finalists who will be invited for personal interviews.

### **Step 5: Evaluation of Finalist Candidates**

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Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

### **Comprehensive Media Search Stage 2**

These Stage 2 Media Reports are compiled by utilizing our proprietary media search process including variations of the candidates’ names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Media Reports typically range from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. The Media Reports are put into an easy-to-read format and recorded onto flash drives for the Search Committee. The candidate’s name is highlighted each time it appears.

These media reports have proven helpful to Search Committees by uncovering issues that were not previously disclosed by candidates and that would likely not have been discovered through an automated search or Google search, typically used by other recruitment firms. The Media Reports also give the Search Committee an overview of the type and extent of press coverage that a candidate has experienced over the course of his/her career.

### **Comprehensive Background Investigation Reports**

Through SGR’s partnership with FirstCheck, a licensed private investigations company, we are able to provide our clients with comprehensive background screening reports that include detailed information such as:

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report
- 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 criminal search (for every county in which candidate has lived or worked) for previous 10 years
- County civil search (for every county in which the candidate has lived or worked) for previous 10 years
- Education verification

A sample Background Investigation Report is included with this proposal document.

**DiSC Management Assessments (supplemental service, if desired)**

SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management Profile 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.

**Press Release (if desired)**

Until you have “sealed the deal,” you need to be cautious in order to avoid the embarrassment of a premature announcement that does not work out. You also want to try 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.

**Stakeholder Engagement (if desired)**

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. Below is an array of options we have used in the past, but 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.

- Interviewing community leaders at the outset of the recruitment;
- Holding a public forum for citizen engagement at the outset of the recruitment;
- Facilitating a Q&A series in the local newspaper with finalist candidates. This would run a week or two prior to the interviews;
- Utilize a citizen committee to conduct the early stage candidate screening and then turn over a semifinalist list to the City Council (if applicable);
- 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; and,
- Site visits by citizen committee members to the finalist candidates’ communities to report back.

## **Step 6: Interview Process**

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Once the finalists have been selected, SGR will coordinate with you to schedule interviews.

### **First Year Game Plan (if desired)**

The “First Year Game Plan” is a process where finalist candidates are provided with the contact information for elected officials, key staff, and community leaders, and candidates are 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.

### **Conduct 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 you need. SGR will prepare sample interview questions and will participate throughout the process to make it smooth and efficient.

### **Deliberations**

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

### **Reference Checks**

Our reference checks are the most comprehensive in the industry. We place very little confidence on the references provided by the candidates since those can be expected to be biased. Instead, we will typically talk to as many as 20 professional contacts for a given candidate including elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, civic leaders, and media representatives. We always seek out the candidate’s greatest critics and greatest fans to ensure a complete, yet balanced, perspective and overview of each candidate.

## **Step 7: Negotiations and Hiring Process**

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Once the organization is ready to make an offer, SGR can provide additional assistance to the client in the following areas.

### **Determine the Terms of an Offer**

Upon request, SGR will provide comparative data for selected organizations, appropriate employment agreement language, and other similar 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.”

### **Transition Strategy**

There are a variety of transition issues when hiring a new executive. SGR will brief the client on transition issues that need to be addressed and will provide a recommendation on what actions to take. Together, we will create a transition strategy that builds the foundation for a successful long-term relationship.

### **Step 8: Post-Hire Team Building Analysis (supplemental service)**

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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. The price is \$4,000 for a half-day onsite workshop, plus travel expenses, and \$150 per person for I-OPT reports.

## STANDARD TIMELINE

Task	Weeks
<ul style="list-style-type: none"> <li>Contract Executed</li> <li>Outline Project Plan, Timeline</li> <li>Individual Interviews with Search Committee / Key Personnel / Community Leaders (if desired)</li> </ul>	Week 1
<ul style="list-style-type: none"> <li>Development of Position Profile Brochure</li> <li>Search Committee Reviews and Approves Brochure</li> </ul>	Weeks 2-3
<ul style="list-style-type: none"> <li>Ad Placements</li> <li>Accept Applications</li> <li>Email Distribution and Marketing of Position Profile</li> </ul>	Weeks 4-7
<ul style="list-style-type: none"> <li>Triage and Scoring of Resumes</li> </ul>	Week 8
<ul style="list-style-type: none"> <li>Search Committee Briefing (Slide Presentation) / Select Semifinalists</li> <li>Candidates Complete Questionnaire and Online Interviews</li> <li>Stage 1 Media Searches</li> </ul>	Week 9
<ul style="list-style-type: none"> <li>Deliverable: Semifinalist Briefing Books</li> </ul>	Week 10
<ul style="list-style-type: none"> <li>Search Committee Briefing / Select Finalist Candidates</li> </ul>	Week 11
<ul style="list-style-type: none"> <li>Comprehensive Media Search Stage 2</li> <li>Comprehensive Background Screening Report</li> <li>DiSC Management Assessment (supplemental service)</li> </ul>	Weeks 12-13
<ul style="list-style-type: none"> <li>Deliverable: Finalist Briefing Books</li> </ul>	Week 14
<ul style="list-style-type: none"> <li>Stakeholder Engagement (if desired)</li> <li>Conduct Interviews</li> <li>Deliberations</li> <li>Reference Checks</li> <li>Negotiations</li> <li>Announcement / Press Release</li> </ul>	Week 15

**TAB 6**

## PROJECT COST

### All-Inclusive Maximum Price

Professional Services Fee:	\$ 18,500
Expenses Not-to-Exceed:	\$ 8,000
<b>All-Inclusive, Not-to-Exceed Maximum Price:</b>	<b>\$ 26,500*</b>

### Expenses Not-to Exceed

SGR does not bill the client for any expenses except for those explicitly detailed herein. Items included in the Expenses Not-to-Exceed include:

- Professional production of a high quality brochure. This brochure (typically 4 pages) is produced by SGR's graphic designer for a flat fee of \$1,500.
- Marketing and Ad Placements:
  - Announcement in SGR's 10 in 10 Leadership and Innovation e-newsletter
  - Email blast to SGR's profession-specific opt-in subscriber list
  - Featured post on SGR's website
  - Featured ad on SGR's job board
  - Promotions on SGR's social media pages – Facebook, Twitter, LinkedIn, Instagram
  - Targeted ad placements on LinkedIn users' pages who have been selected by LinkedIn's algorithm to be a match for your job posting.
  - Ad placements with one national association and one state association. These two ads are billed at actual cost, with no markup for overhead. Additional ad placements, or the organization's choice, will be billed over and above the not-to-exceed maximum price.
- Printing of documents and materials. Reproduction costs for reports and briefing books presented to the client at 26 cents per copy, plus the cost of binders/binding. Flash drives are billed at \$10 each.
- Online interviews. There is a cost of \$200 for each recorded online interview. SGR recommends conducting online interviews at the semifinalist stage (up to 12 semifinalists).
- Comprehensive Media Reports – Stage 2. There is a cost of \$500 per candidate. SGR recommends conducting Stage 2 media searches on the finalist candidates (up to 6 finalists).
- Comprehensive Background Investigation Reports. There is a cost of \$300 per candidate for comprehensive background screening reports prepared by our licensed private investigations provider. SGR recommends conducting comprehensive background investigations on the finalist candidates (up to 6 finalists).

- Travel for the Executive Recruiter (incurred for the benefit of the client). Meals are billed at a per diem rate of \$10 for breakfast, \$15 for lunch, and \$25 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.
- Up to four (4) visits/trips by the Recruiter to the Organization. Any additional visits/trips by the Recruiter to the Organization will be billed over and above the not-to-exceed maximum price.

### **\*Supplemental Services**

The supplemental services listed below are not included in the maximum price above. These supplemental services include:

- Candidate Travel. Candidates are typically reimbursed directly by the client for travel expenses. If the client prefers a different arrangement for candidate travel, SGR will be glad to accommodate the client's wishes.
- Stakeholder Survey. 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. Written summary of results is provided to the organization.
- Additional Ad Placements. Additional ad placements, as approved by the organization, that are not included in the not-to-exceed expenses will be billed back at actual cost with no markup for overhead.
- DiSC Assessments. There is a cost of \$150 per candidate for the DiSC Management Profile.
- Post-Hire Team Building Analysis. A half-day onsite workshop is \$4,000, plus travel expenses, and \$150 per person for I-OPT reports.
- Site Visits to Communities of Finalist Candidates. If desired, the Executive Recruiter will travel to the communities of the finalist candidates to conduct onsite visits. Site visits will be charged at a day rate of \$1,000 per day, plus travel expenses.
- In the unexpected event the client shall request that unusual out of pocket expenses be incurred, said expenses will be reimbursed at the actual cost with no mark up for overhead.
- If the client 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. Supplemental services will be billed out at \$250 per hour.



**Billing**

Professional fees for the recruitment are billed in three equal installments during the course of the recruitment. The initial installment is billed after the Organizational Inquiry and Analysis is completed and the position profile has been created. The second installment is billed when semifinalists are selected. The final installment is billed at the conclusion of the recruitment. Expense (reimbursable) items and supplemental services will be billed with each of the three installments, as appropriate.

**Service Guarantee**

SGR guarantees that you will be satisfied with the results of the recruitment process, or we will repeat the entire process at no additional professional fee until you find a candidate that you desire. Additionally, if you select a candidate (that SGR has fully vetted) who resigns or is released within 18 months of their hire date, SGR will repeat the process at no additional professional fee to the client. 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.

**TAB 7**

## City/Town/County Manager & Administrator Recruitments, 2014 to Present

### 2018

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- Anna, Texas (pop. 11,000)
- Bethany, Oklahoma (pop. 19,600)
- Clallam County, Washington (pop. 75,000) – in process
- Clark County, Washington (pop. 345,000)
- Coffeyville, Kansas (9,800) – in process
- Craig, Colorado (pop. 8,800)
- Erie, Colorado (pop. 26,000) - upcoming
- Forney, Texas (pop. 17,500)
- Freeport, Texas (pop. 12,000) – in process
- Fulshear, Texas (pop. 4,000)
- Green Cove Springs, Florida (pop. 7,000) – in process
- Humble, Texas (pop. 15,000)
- Jacksonville, Texas (pop. 14,600)
- Lebanon, Missouri (pop. 14,300)
- Lockhart, Texas (pop. 13,000) – in process
- Marshall, Texas (pop. 24,700) – in process
- Murfreesboro, Tennessee (pop. 131,900)
- Nixa, Missouri (pop. 20,500) – in process
- Paducah, Kentucky (pop. 25,000)
- Pflugerville, Texas (pop. 54,600)
- Riverside, Missouri (pop. 3,000)
- Smithville, Missouri (pop. 9,000)
- Springfield, Missouri (pop. 167,300)
- Sunnyvale, Texas (pop. 5,700) – in process
- Tolland, Connecticut (pop. 15,000) - upcoming
- West University Place, Texas (pop. 14,000) – upcoming

## 2017

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- Amarillo, Texas (pop. 189,000)
- Bastrop, Texas (pop. 8,400)
- Bedford, Texas (pop. 49,000)
- Bozeman, Montana (pop. 41,600)
- Brenham, Texas (pop. 16,300)
- Choctaw, Oklahoma (pop. 11,500)
- Colleyville, Texas (pop. 24,500)
- Grandview, Missouri (pop. 25,300)
- Jupiter, Florida (pop. 60,700)
- Killeen, Texas (pop. 119,000)
- Midland, Michigan (pop. 40,800)
- Parkville, Missouri (pop. 5,400)
- Plant City, Florida (pop. 33,000)
- Saginaw, Texas (pop. 21,700)
- San Marcos, Texas (pop. 53,000)
- Sealy, Texas (pop. 6,400)
- Stephenville, Texas (pop. 17,400)
- Topeka, Kansas (pop. 127,000)
- Vail, Colorado (pop. 4,800)

## 2016

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- Angleton, Texas (pop. 19,000)
- Beavercreek, Ohio (pop. 45,000)
- Bethany, Oklahoma (pop. 19,500)
- Canadian, Texas (pop. 2,900)
- Carrollton, Texas (pop. 128,000)
- Clarksville, Indiana (pop. 22,000)
- Craig, Colorado (pop. 9,300)
- Davenport, Iowa (pop. 101,000)

- Des Moines, Washington (pop. 29,000)
- Elgin, Texas (pop. 10,000)
- Forney, Texas (pop. 16,000)
- Gunnison, Colorado (pop. 5,500)
- Hot Springs, Arkansas (39,000)
- Lake Dallas, Texas (pop. 8,000)
- Lake Worth, Texas (pop. 4,000)
- Muskegon Heights, Michigan (pop. 11,500)
- Northglenn, Colorado (pop. 34,000)
- Palestine, Texas (pop. 18,000)
- Piney Point Village, Texas (pop. 3,500)
- Port Lavaca, Texas (pop. 11,000)
- Spokane Valley, Washington (pop. 90,600)
- Stillwater, Oklahoma (pop. 46,000)
- Sweetwater, Texas (pop. 10,000)
- Valley Center, Kansas (pop. 5,000)
- Williston, North Dakota (pop. 13,000)

## 2015

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- Abilene, Texas (pop. 118,000)
- Altus, Oklahoma (pop. 19,000)
- Azle, Texas (pop. 11,500)
- Baytown, Texas (pop. 70,000)
- Ballwin, Missouri (pop. 30,000)
- Bridgeport, Texas (pop. 6,000)
- Casper, Wyoming (pop. 53,500)
- Duncanville, Texas (pop. 36,400)
- Georgetown, Texas (pop. 50,000)
- Granbury, Texas (pop. 6,800)
- Kaufman, Texas (pop. 8,900)

- Kilgore, Texas (pop. 13,000)
- Lamesa, Texas (pop. 9,300)
- Missouri City, Texas (pop. 74,500)
- Montgomery, Texas (pop. 800)
- Sealy, Texas (pop. 6,400)

## 2014

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- Burien, Washington (pop. 49,000)
- Fate, Texas (pop. 7,000)
- Henderson, Texas (pop. 14,000)
- Joshua, Texas (pop. 6,000)
- Kyle, Texas (pop. 30,500)
- League City, Texas (pop. 88,000)
- Lindale, Texas (pop. 5,000)
- Miami, Oklahoma (pop. 13,500)
- Port Arthur, Texas (pop. 56,700)
- South Padre Island, Texas (pop. 3,000)
- Stephenville, Texas (pop. 17,400)
- Tyler, Texas (pop. 98,800)

*Population numbers are approximate.*

## Executive Recruitment Clients

### Arizona

- Chandler

### Arkansas

- Fort Smith
- Hot Springs

### Colorado

- Arvada
- Aurora
- Commerce City
- Craig
- Durango
- Englewood
- Erie
- Golden
- Gunnison
- Mountain View Fire Protection District
- Northglenn
- Pitkin County
- Trinidad
- Vail
- Wheat Ridge

### Connecticut

- Tolland

### Florida

- Arcadia
- Boynton Beach
- Charlotte County
- DeLand
- Delray Beach
- Fernandina Beach
- Fort Lauderdale

- Green Cove Springs
- Hallandale Beach
- Jupiter
- Lakeland
- Lee County
- Palm Beach Shores
- Plant City
- Port St. Lucie
- Sunny Isles Beach
- Tamarac
- Winter Haven

### Georgia

- Albany
- Johns Creek

### Indiana

- Clarksville

### Iowa

- Davenport

### Kansas

- Coffeyville
- Hutchinson
- Lenexa
- Manhattan
- Overland Park
- Shawnee
- Topeka
- Valley Center
- Wyandotte County / Kansas City

### Kentucky

- Paducah

**Louisiana**

- Shreveport

**Michigan**

- Kalamazoo County Consolidated Dispatch Authority (KCCDA)
- Midland
- Muskegon Heights

**Mississippi**

- Hancock County Port & Harbor Commission

**Missouri**

- Ballwin
- Cameron
- Cape Girardeau
- Grandview
- Lebanon
- Nixa
- Parkville
- Raytown
- Riverside
- Sikeston
- Smithville
- Springfield
- St. Charles

**Montana**

- Bozeman

**Nevada**

- Las Vegas
- Washoe County

**New Mexico**

- Farmington

- Four Corners Economic Development
- Los Lunas

**North Carolina**

- Orange County

**North Dakota**

- Mountrail Williams Electric Cooperative
- Williston

**Ohio**

- Beavercreek
- Franklin County

**Oklahoma**

- Altus
- Bethany
- Broken Arrow
- Chickasha
- Choctaw
- Edmond
- Elk City
- Guthrie
- Lawton
- Miami
- Mustang
- Oklahoma Municipal League
- Owasso
- Stillwater

**Oregon**

- Eugene
- Springfield

**Tennessee**

- Brentwood
- Chapel Hill



- Mount Pleasant
- Murfreesboro
- Nolensville
- Thompson's Station

**Texas**

- Abilene
- Addison
- Alamo Heights
- Alice
- Allen
- Alvin
- Amarillo
- Angleton
- Anna
- Argyle
- Arlington
- Atlanta
- Austin
- Azle
- Bastrop
- Bay City
- Baytown
- Bedford
- Bellaire
- Big Spring
- Boerne
- Breckenridge
- Brenham
- Bridgeport
- Brushy Creek Regional Utility Authority
- Burkburnett
- Burleson
- Burnet
- Canadian
- Canton
- Carrollton
- Cedar Hill
- Cedar Park
- Cleveland
- Clute
- College Station
- Colleyville
- Colorado River Municipal Water District
- Commerce
- Converse
- Copper Canyon
- Corpus Christi
- Dalhart
- Dallas County Park Cities MUD
- Dalworthington Gardens
- Denison
- Denison Chamber of Commerce
- Denton County Fresh Water Supply District 1-A
- Denton
- Duncanville
- El Paso MPO
- El Paso
- Elgin
- Fairview
- Farmers Branch
- Farmersville
- Fate
- Ferris
- Flower Mound
- Forney
- Fort Worth
- Freeport
- Friendswood
- Fulshear
- Gainesville
- Galveston
- Garland

- Georgetown
- Gonzales
- Granbury
- Grand Prairie
- Grapevine
- Greenville
- Gulf Coast Water Authority
- Harris County ESD No. 48
- Henderson
- Hewitt
- Highland Park
- Hudson Oaks
- Humble
- Huntsville
- Hutto
- Hutto EDC
- Ingleside
- Irving
- Jacksboro
- Jacksonville
- Jacksonville Development Corporation (JEDCO)
- Joshua
- Kaufman
- Keller
- Kilgore
- Killeen
- Kyle
- La Porte
- Lake Dallas
- Lakeway
- Lake Worth
- Lamesa
- Lancaster
- League City
- Leander
- Levelland
- Lewisville
- Lindale
- Little Elm
- Lockhart
- Longview
- Lorena
- Lubbock
- Lufkin
- Marshall
- McKinney EDC
- McKinney
- Memorial Villages PD
- Midland
- Midlothian EDC
- Missouri City
- Montgomery
- Mount Pleasant
- Mount Pleasant EDC
- Nederland
- North East Texas Regional Mobility Authority (NET RMA)
- North Richland Hills
- North Texas Emergency Communications Center (NTECC)
- Odessa
- Palestine
- Paris
- Pearland
- Pflugerville
- Piney Point Village
- Plainview
- Plano
- Portland
- Port Arthur
- Port Lavaca
- Port Neches

- Princeton
- Prosper
- Red Oak
- Richardson
- Richland Hills
- Riverbend Water District
- Rockport
- Rockwall
- Round Rock
- Rowlett
- Royse City
- Sachse
- Saginaw
- San Angelo
- San Marcos
- San Marcos/Hays County EMS
- Seabrook
- Seagoville
- Sealy
- Sherman
- Snyder
- Socorro
- South Padre Island
- Southlake
- Stephenville
- Sugar Land
- Sweetwater
- Tarrant County 9-1-1 District
- Taylor
- Temple
- Terrell
- TexAmericas Center
- Texarkana
- The Woodlands
- Tomball
- Trophy Club
- Tyler

- Van Alstyne
- Victoria
- Waco
- Waxahachie
- Weatherford
- West Lake Hills
- Westlake
- Westworth Village
- Wichita Falls
- Willow Park
- Wills Point
- Yoakum

#### **Washington**

- Bainbridge Island
- Bellevue
- Burien
- Clallam County
- Clark County
- Des Moines
- Richland
- Shoreline
- Snoqualmie
- Spokane
- Spokane Valley
- Whitworth Water District #2

#### **Wyoming**

- Casper

#### **Other Organizations**

- Institute for Building Technology and Safety (IBTS)
- BCFS Health & Human Services

## Executive Recruitment Positions

### Administration

- Assistant City Manager
- Assistant County Manager
- Chief Administrative Officer
- City Administrator/City Manager/Town Manager
- City Clerk
- City Secretary
- County Manager
- Deputy City Manager
- Director of Administration
- Executive Director

### Administrative Services/Internal Services

- Administrative Services Director
- Arts Director
- Assistant Police Director
- Chief Medical Examiner
- Event/Marketing Specialist
- Intergovernmental Services Manager
- Management Assistant
- Manager of Town Services
- Special Events Director

### Airport

- Airport General Manager

### Animal Services/Environmental Health

- Animal Services Manager
- Animal Shelter Manager
- Animal Welfare Manager / Director
- Assistant Director of Code Compliance/Animal Welfare
- Director of Animal Care and Control
- Director of Regional Animal Services

- Environmental Health Director
- Executive Director of Animal Services

### Development Services

- Assistant Director of Planning and Development
- Assistant Property Management Director
- Building Official / Chief Building Official
- City Inspector
- Community Development Director/Manager
- Deputy Director of Development Services
- Development Services Director
- Director of Community and Development Services
- Municipal Services Director
- Neighborhood Services Director
- New Urbanist
- Planning & Community Development Assistant Director
- Planning & Community Development Director
- Planning Director
- Property Management Director
- Redevelopment Project Manager
- Senior Building Inspector / Building Inspector
- Tourism and Community Development Director

### Economic Development/CVB

- Assistant Economic Development Director
- Chamber of Commerce President
- CVB Executive Director

- Director of the Office of ED (County)
- Downtown Development Director
- Economic Development Corporation Executive Director
- Economic Development Corporation President/CEO
- Economic Development Director/Executive Director
- Economic Development Manager
- Executive Director of Port & Harbor Commission
- Senior Redevelopment Project Manager
- Vice President/Chief Econ Development Officer

#### **Finance**

- Accounting Services Supervisor
- Assistant Director of Finance
- Budget Director / Manager / Officer
- Capital Projects Budget Manager
- Chief Financial Officer
- Deputy Director of Finance
- Finance Controller / Auditor / Comptroller
- Finance Director/Finance Officer
- Finance Manager
- Purchasing Manager
- Senior Accountant
- Senior Budget Analyst
- Treasury Supervisor

#### **Human Resources/Civil Services**

- Assistant Human Resources Director
- Chief Performance Officer
- Director of Human Resources & Risk Management
- Human Resources/Civil Services Director
- Human Resources Director

#### **Information Technology**

- Chief Information Officer
- Chief Technology Officer
- GIS Manager
- IT Assistant Director
- IT Developer / Director / Manager
- IT Manager (Police Department)
- Senior Software Developer

#### **Innovation**

- Chief Knowledge Officer

#### **Legal**

- Assistant City Attorney
- City Attorney (Individual and Firm)
- Court Administrator
- Director of Municipal Court Services
- First Assistant City Attorney

#### **Library**

- Chief Librarian
- Librarian
- Library Director
- Senior Librarian

#### **Marketing and Community Engagement**

- Community Relations Manager
- Community Services Administrator
- Community Services Director
- Director of Community Affairs
- Director of Marketing and Community Engagement
- Public Information Officer
- Public Relations Coordinator

#### **Metropolitan Planning Organization**

- Director of Metropolitan Planning Organization

**Museum**

- Museum Director

**Parks and Recreation**

- Assistant Director of Parks and Recreation
- Parks and Recreation Director
- Park Superintendent
- Program Area Manager (Parks)
- Recreation Superintendent

**Public Safety/EMS/Emergency****Management**

- Assistant Fire Chief
- Assistant Police Chief
- Battalion Chief
- Chief of Public Safety
- Deputy Director, Emergency Communications
- Deputy Director - Police Administrative Services
- Emergency Dispatch Director
- Emergency Management Coordinator
- EMS Executive Director
- Executive Director, Emergency Communications
- Fire Chief
- Homeland Security and Emergency Management Director
- Lieutenant
- Police Chief
- Public Safety Director
- Safety Services Manager

**Public Works/Utilities/Engineering**

- Assistant City Engineer
- Assistant General Manager for Water District

- Assistant Utilities Director
- Chief Plant Operator
- City Engineer
- City Planner
- City Services Director
- Deputy Director of Public Works/City Engineer
- Deputy Director of Utilities
- Director of Capital Projects and Engineering
- Director of Engineering & Environmental Services
- Director of Projects & Engineering
- Director of Public Services
- Director of Utilities
- Electric Utility Director
- Electrical Engineer
- Engineering Project Manager
- Engineering Services Manager for Water District
- Facilities Engineer
- MUD General Manager
- Planning & Engineering Director
- Planning Manager
- Public Works Assistant Director
- Public Works Director
- Public Works Director/City Engineer
- Regional Utility Authority General Manager
- Sanitation Director
- Utility Services Director
- Water District Executive Director
- Water District General Manager

**Transportation/Fleet Services**

- Assistant Municipal Garage Superintendent

- Assistant Superintendent of Fleet Services
- Director of Operations and Maintenance
- Director of Street Operations
- Equipment Services Manager
- Facilities Services Manager
- Fixed-Base Operator Services
- Fleet Equipment Services Manager
- Fleet Services Manager
- Senior Transportation Planner
- Streets and Stormwater Director
- Transportation Manager

**TAB 8**



## References

Missy Dean, Director of Governmental Relations  
Oklahoma Municipal League  
Email: [missy@oml.org](mailto:missy@oml.org)  
Phone: 405-528-7515  
Project: Executive Director recruitment in 2017

Randy Ross, Mayor  
City of Choctaw, Oklahoma (pop. 12,000)  
Email: [mayor@choctawcity.org](mailto:mayor@choctawcity.org)  
Phone: 405-390-8198  
Project: City Manager recruitment in 2017

KP Westmoreland, Mayor  
City of Bethany, Oklahoma (pop. 19,000)  
Email: [kp.westmoreland@bethanyok.org](mailto:kp.westmoreland@bethanyok.org)  
Phone: 405-495-6248  
Project: City Manager recruitment in 2018

Michael Spurgeon, City Manager  
City of Broken Arrow, Oklahoma (pop. 112,000)  
Email: [mspurgeon@brokenarrowok.gov](mailto:mspurgeon@brokenarrowok.gov)  
Phone: 918-259-8419  
Project: Multiple recruitments

Jarrett Atkinson, City Manager  
City of Lubbock, Texas (pop. 252,000)  
Email: [jatkinson@mylubbock.us](mailto:jatkinson@mylubbock.us)  
Phone: 806-775-2003  
Project: Multiple recruitments

Ike Obi, Director of Human Resources and Risk Management  
City of McKinney, Texas (pop. 172,000)  
Email: [jobi@mckinneytexas.org](mailto:jobi@mckinneytexas.org)  
Phone: 972-547-7562  
Project: Multiple recruitments

Mitchell Normand, Human Resources Director  
City of Amarillo, Texas (pop. 189,000)  
Email: [mitchell.normand@amarillo.gov](mailto:mitchell.normand@amarillo.gov)  
Phone: 806-378-3090  
Project: Multiple recruitments

Missie Pustejovsky, Director of Human Resources  
City of Waco, Texas (pop. 126,000)

Email: [MissieP@wacotx.gov](mailto:MissieP@wacotx.gov)

Phone: 254-750-5740

Project: Multiple recruitments

Frank Klipsch, Mayor

City of Davenport, Iowa (pop. 101,300)

Email: [fklipsch@ci.davenport.ia.us](mailto:fklipsch@ci.davenport.ia.us)

Phone: 563-326-7701

Project: City Administrator recruitment in 2016

**TAB 9**

## UNSOLICITED FEEDBACK REGARDING SGR'S PERFORMANCE

Following are a few unsolicited quotes from emails we have received. This unsolicited feedback demonstrates that our practice of using the Golden Rule to determine how we treat everyone leaves no doubt in the minds of both clients and candidates that we are truly superior to the competition. We do not include names to avoid the suggestion of an endorsement, which is prohibited under the ICMA Code of Ethics.

"I have had the opportunity to apply and interview with various executive search firms in the past but I can say with absolute honesty that the applicant review and interview process that SGR conducted was the most in-depth and thorough applicant process of which I have had the pleasure to participate."

"I wanted to thank you again for the opportunity to speak with you about the [position]. I have always said that the difference between a good recruiter and a great recruiter is the distance they go to find the absolutely best qualified candidates for any given position. The fact that you relentlessly hunted me down on the other side of the world speaks volumes about you as a professional."

"I was impressed with the professionalism and thoroughness of your company. I am very pleased with where we ended up. I was a little nervous entering the process. But it turned into a very positive experience for the Council and the City."

"Thanks so much for SGR's help. We had dozens of well qualified applicants, and most would probably not have been received without the support and expertise of SGR. The contacts and network that SGR brought to the process were invaluable. [Recruiter] was a joy to work with. He was extremely professional and knowledgeable. He guided us through the process and kept us on the preset timeline."

"...I do appreciate your and your company's professionalism, but more importantly the thoughtfulness and personal attention you provide candidates, which I'm sure is equally provided to your client. That attention is often lacking in other municipal search firms and is a great attribute of SGR."

"Thanks for the update. I have to admit, I've never received a status update note from a recruiter providing such an informative message about what is happening with the position. I really appreciate it and as a human resources professional, I'll tuck this thought away for future reference as a best practice."

"Thank you so much for sharing the article. I haven't seen another executive recruitment firm be so proactive and engaged with job candidates. Very impressive."

“Ron, I thought I would reinforce to you, how much I appreciate the way your staff, like [recruiter] and others, stay in touch with applicants throughout the process. You are unique in the current trends of electronic application systems but some are operated by people not functioning like "Servant leaders"! Your staff gets the concept and walks the walk! Thanks for your "Servant leadership" and its impact on the HR leadership.”

“[T]hank [recruiter] and Ron Holifield for your professionalism and timely attention to my inquiries and concerns...I sincerely appreciate the firm’s commitment to its clients and the applicant pool.”

“Thanks to your company for all of the opportunities that they allowed me during my brief stint amongst the unemployed. You have amazing people working for you.”

“I truly value your level of communication in this process. I’d not realized my commitment to communication until being in a position where there is an extreme lack of communication and I have no way to foster. So thank you for being one of the few examples of how it can be done.”

“A special thank you to [recruiter]. He was very helpful during this process. I will definitely be recommending SGR to my professional colleagues.”

“Thank you very much for your continuous update on the status of my application for the [position] and I really appreciate the commitment by your team and yourself to make this a wonderful experience. I admire your level of professionalism and hope that I get a chance to work among such a wonderful team in future.”

“I also appreciate your engagement with me as a candidate during this process. It has been one of the most professional experiences with a recruiter I have had. You should be commended for your efforts to lead such an effort. In the future, if I ever need assistance to fill a position, I will surely keep you in mind.”

“The more I deal with you, Ron, and the rest of your team, the more impressed I am with your level of professionalism and care. You are awesome.”

“I have been very impressed with your selection process. This has been a very time consuming process for candidates like me but I see a great value for the employers. You have developed a great selection process. Honestly, when I compare it to what my colleagues and I have done at Big 4 firms, your process is more comprehensive and much better.”

“I just wanted to take a moment of your time to thank you for your very professional demeanor while conducting the job search for the [city]. SGR is very thorough. I am impressed by the diligence of SGR. All interviews are a continuing learning process; I have learned from this experience, especially the video interview. You all are very kind; and, I wanted you to know that I appreciate having this experience and appreciated the interaction with everyone at SGR.”

“I must say, this has been one of the most professional and well organized recruiting processes I have seen in a very long time. You and your team have kept the candidates abreast of the process completely along the way. Thank you kindly for going the extra mile to make this a very pleasant experience. You and your team represent the HR profession amazingly. Simply impressive.”

“Thank you for the update. I wanted to let you know that I truly enjoyed your recruitment style. You are timely and informative. The information sent by yourself and [SGR staff] is relevant and a wonderful way to keep potential candidates ‘warm’ while you evaluate resumes.”

“I just wanted to say how nice it is to get updates on the status of the search. I'm in the process of looking at several positions and it can be very frustrating to sometimes go months without knowing if the organization has chosen anyone. (Many places will not return calls or emails inquiring about status, either.) No matter the outcome, this is definitely one of the best run searches I have been a part of. Thanks again for keeping us all in the loop.”

“I would like to say that I really appreciate the level of communication from you and SGR regarding the status of the process in [city] and what the expected next steps were. I have dealt with a number of search firms over the last year and SGR has done an excellent job in communicating with applicants. Far too often I have heard nothing from the firm conducting a search and found out through other sources that the position had been filled. Again I really appreciate the level of communication.”

“SGR really is a class act and I appreciate the personal nature of your communications – you must have an excellent staff. I have been through more than a few applications while transitioning from the military, and I will tell you that your company stands at the top.”

“I sincerely believe your personal courtesy and agency is the most professional of any I have ever experienced.”

**TAB 10**

# KRISTIN NAVARRO, MPA, CGFO

Keller, TX 76244 | 817-637-3243 | klemons@live.com |

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## DIRECTOR OF RECRUITMENT AND BUSINESS DEVELOPMENT

Standout recruiting and government professional with **multi-year experience** in a variety of **strategic planning roles** with emphasis in **recruiting, budget development, long-term financial planning, variance analysis, forecasting, strategic planning and ad hoc analytical support**. Excellent time manager who excels in demanding environments, leveraging highly developed communication skills that enhance any team-oriented setting, offering inventive solutions to challenging problems.

Candidate sourcing  
Executive recruiting  
Class facilitation  
Event Planning

Strategic Planning  
Elected Official relations  
Key Performance Indicators  
Team Project Management

Ad Hoc Analytical Support  
Policy Development  
Public Speaking

### - SELECT CAREER ACHIEVEMENTS -

- **Lead for the development of/updates to the City's Financial Policies**
  - **Lead for developing KPIs and performance measures for Finance Department**
  - **Served on a grants review panel for the Arts Council of Fort Worth**
  - **Served as Liaison to the Performance Management Office**
  - **Served as Legislative Affairs Liaison for the Department of Finance**
  - **Prepared an in-depth economic analysis of the national, state, and regional economy and their impact on the Town of Trophy Club and presented this to Town Council**
  - **Prepare council presentations, draft public announcements, and press releases**
  - **Represented the Town of Trophy Club at several public events to promote the Town and educate citizens/stakeholders on various capital projects/economic development initiatives**
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## PROFESSIONAL OVERVIEW

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### STRATEGIC GOVERNMENT RESOURCES | Keller, TX

#### Director of Business Development and Recruitment (October 2018 – Present)

- Travel nationwide to potential client cities to discuss recruitment opportunities
- Attend special events/networking events to develop client base and bring in new business
- Responsible for business development through in person meetings with high profile clients as well as strategic written communication
- Highly targeted personal outreach for Executive Searches
- Work directly with Elected Officials throughout search process
- Candidate sourcing
- Lead special projects/initiatives

### HC LEGAL SEARCH | Dallas, TX

#### Legal Search Consultant (April 2018 – October 2018)

- Responsible for developing relationships in the legal community and locating the right candidates for clients
- Oversee client relationships
- Assist Owner with implementing new and innovative avenues for candidate sourcing
- Attend special events/networking events to develop client base and bring in new business
- Assisted in implementation of using social media to develop business
- Effectively work with high profile attorneys throughout DFW



## **STRATEGIC GOVERNMENT RESOURCES | Keller, TX**

**Director of Recruitment/Recruiter** (February 2017 – April 2018)

**Executive Recruitment Manager** (May 2016 – February 2017)

- Oversee all Executive Recruitments in the company (50+ searches at one time)
- Oversee all recruiters and assist in developing search timelines to ensure client satisfaction
- Manage office staff and coordinate all search efforts
- Travel nationwide to potential client cities to discuss recruitment opportunities
- Highly targeted personal outreach for Executive Searches
- Work directly with Elected Officials throughout search process
- Assist in coordinating efforts for annual SGR conference
- Candidate sourcing
- Lead special projects/initiatives
- Develop curriculum for learning workshops offered to clients
- Facilitate learning workshops in client cities
- Coach recruiters regarding specific needs of clients

## **CITY OF FORT WORTH | Fort Worth, TX**

**Senior Strategic Business Analyst (Finance Management Team)** (April 2015 – May 2016)

**Management Analyst II** (September 2014 to April 2015)

**Management Analyst I** (September 2013 to September 2014)

- Lead a staff of analysts
- Develop/improve upon workflow processes
- Department liaison - implementation of new ERP system
- Department liaison - legislative affairs
- Organize/oversee all strategic planning events in the Department of Finance
- Develop educational tools/programs to enhance staff development /manage implementation of new processes
- Develop performance measures and track results
- Provide a wide variety of analytical and research support to all City departments
- Analyze and make recommendations for the solution of budgetary, fiscal, or operational concerns
- Participate in multiple special projects including research of new programs and services, and feasibility analysis
- Receive and respond to complaints and questions; review problems and recommend corrective actions; prepare summary reports as required
- Facilitate meetings with Department Directors, elected officials, and the City Manager
- Present project updates to City Council
- Develop updates and revisions to the City's Financial Management Policies

## **TOWN OF TROPHY CLUB | Trophy Club, TX**

**Budget Analyst** (July 2012 to August 2013)

**Town Manager's Office** (February 2012 to July 2012)

- Prepared Bank Reconciliations
- Responsible for preparing the Town's monthly financial reports submitted to Town Council
- Responsible for the preparation of and the budget process for the Town's Annual Budget
- Facilitated meetings with Department Directors
- Budget monitoring and year-end projections/forecasts
- Represented Town at various Chamber of Commerce events to promote commercial development

## **EDUCATION & CREDENTIALS**

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University of North Texas | Denton, Texas | **MPA**, 2012

University of North Texas | Denton, Texas | **BA, Political Science**, 2008

**Certified Government Finance Officer**, 2015

## **MEMBERSHIPS AND RECOGNITION**

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Government Finance Officers Association of Texas (GFOAT)

Government Finance Officers Association (GFOA)

Pi Alpha Alpha – National Honor Society (2012)

Community Service Chair – Public Administration Student Association (2012)

**Ron Holifield**  
**Resume – July, 2018**

Strategic Government Resources, P.O. Box 1642, Keller, Texas 76248  
Cell: 214-676-1691, [Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)

**PROFESSIONAL HISTORY**

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**Strategic Government Resources – Owner & CEO**  
**January 1999 to Present**

- Owner and CEO of this strategic management firm, helping over 550 local governments in 47 states Recruit, Assess and Develop Innovative, Collaborative and Authentic Leaders.
- SGR is the largest provider of live and online training in the nation designed specifically for local government, training up to 1,000 employees/officials every month.
- SGR is the third largest local government executive search firm in the nation.
- Interviewed and/or quoted by numerous news publications and media outlets including: National Public Radio, Entrepreneur Magazine, Government Technology, GovWire, Federal Computer Week, CIO Magazine, Dallas Business Journal, DFW Tech Biz, D Magazine, International Association of Chiefs of Police Journal, as well as numerous newspapers and broadcast news outlets in a wide variety of national media markets.

**Government Relations Specialists – Owner & CEO**  
**August 1996 to September 2001**

- Owner and CEO of this consulting firm which represented businesses doing business with government and in legislative advocacy efforts.
- Doubled it in size, becoming the 49<sup>th</sup> largest lobby firm in Texas, and then sold it to an employee to focus all efforts on the launch of SGR.
- Major clients included over 40 Fortune 500 firms including American Express, Aramark, Automated Licensing Systems, Children's Comprehensive Services, IBM, Quorum Health Group, Library Systems and Services, PeopleSoft, SCT, Space Imaging, TXI, Verizon, Xerox and many others.

**City of DeSoto, Texas – City Manager**  
**October 1994 to August 1996**

- Significant accomplishments include:
  - Named by Texas Business Magazine as a top 20 Texas city to relocate a business.
  - Named by Texas Outlook Magazine as a top 25 city for economic development.
  - Named by Texas Business Magazine as one of the “Best Run Cities in Texas.”
  - Increase in commercial building permits in excess of 1,000% over previous year.
  - Lowest crime rate of any major city in the Dallas-Fort Worth Metroplex.

**City of Garland, Texas – City Manager  
November 1991 to June 1994**

- City Manager of this rapidly growing city, which owns and operates an electric production and distribution system, a regional wastewater treatment system, a regional landfill, and a heliport, and offers a variety of social services and strong cultural arts. The ninth largest city in Texas, Garland's population was in excess of 220,000 with over 2,300 employees, and an annual operating and capital budget in excess of \$350 million.
- Hired to take this very traditional manufacturing-based community and rapidly position it as a statewide leader, transforming its one-dimensional image and reputation as a blue-collar suburb into that of a leading first tier city.

**City of Plano, Texas – Assistant City Manager, Assistant to the City Manager  
November 1986 to November 1991**

- Served in a variety of capacities in this rapidly growing, premier city, including: Assistant City Manager of Community Services, Assistant City Manager of Administration, Acting Assistant City Manager for Development, and Assistant to the City Manager.

**City of Farmersville, Texas – City Manager  
1984 to 1986**

- First City Manager of this full service city operating an electric system and two lakes.

**City of Sundown, Texas – City Manager  
1982 to 1984**

- City Manager of this full service city operating a natural gas system and a golf course.

**City of Lubbock, Texas – City Administrative Intern to the City Manager  
1981 to 1982**

- Administrative Intern to the City Manager.

**EDUCATION**

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- Texas Tech University – Masters of Public Administration
- Abilene Christian University – Bachelor of Arts, Government Major / Student Association President

**MAJOR AWARDS for Municipal Organizations Managed**

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- 3CMA Economic Development Marketing Campaign Savvy Award Certificate of Excellence for International Development and Local Realtor Ads - Garland
- International Association of Chiefs of Police, Excellence in Policing Award for Neighborhood Service Team - Garland
- Finalist, Governor's Environmental Excellence Award - Garland
- Texas Natural Resource Conservation Commission Award for Excellence - Garland
- American Society of Landscape Architects, Texas Chapter, Environmental Stewardship Award for Garland's Spring Creek Forest Preserve - Garland
- Dallas Business Journal, "Metroplex Real Estate Deal of the Year (Existing Building)," - Garland
- Dallas Business Journal "Metroplex Real Estate Deal of the Year (New Construction)," - Garland
- GFOA Award for Distinguished Budget Presentation, every year, 1987-1996
- GFOA Certificate of Achievement for Excellence in Financial Reporting, 1987-1991

**CURRENT PROFESSIONAL PARTICIPATION**

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- ICMA Task Force on Model Employment Agreements
- Member, Texas Fire Chief's Association Best Practices Recognition Board, 2014-present
- Missouri Municipal League Governance Institute Fellow, 2013-present
- Member, International City/County Management Association (ICMA), 1982-present
- Member, Texas City Management Association (TCMA), 1982-present
- Member, Texas Municipal Human Resources Association, 2006 - present
- Member, Governmental Finance Officers Association, 2010 - present

**PREVIOUS PROFESSIONAL PARTICIPATION**

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- Author of *4<sup>th</sup> Dimension Leadership – a Radical Strategy for Creating An Authentic Servant Leadership Culture*
- Author of a Monthly Column in Texas City Manager Magazine on "Innovations that Make a Difference"
- Author, "the 16%" weekly blog
- ICMA Task Force on Employment Agreements
- ICMA Task Force on Inclusiveness
- ICMA Conference Evaluation Committee
- ICMA Management Innovations Panel
- ICMA Conference Evaluation Committee
- ICMA/Innovation Groups National Management Practices Panel
- Texas Police Chief's Association Training Advisory Committee

- National Institute for Governmental Purchasing Talent Management Council
- Texas City Management Association Task Force on Professional Development
- Author, “The Public Executive’s Complete Guide to Employment Agreements”, book published by ICMA and the Innovation Groups
- Texas Innovation Groups Executive Committee
- Author, “Crossing Department Lines – Garland’s Neighborhood Service Team”, article published in the International Association of Chiefs of Police National Journal
- Author, “Redefining Thinking, Structures and the Rules of the Game in Government”, article published in Texas Town and City Magazine
- Contributor, State Comptroller Bob Bullock’s handbook for municipalities: “Standard Financial Management System for Texas Cities”
- Texas Municipal League Advisory Committee on Legislative Affairs – Personnel Issues
- TCMA Ethics and Professional Standards Committee
- TCMA Annual Conference Committee

## **MAJOR SPEAKING ENGAGEMENTS**

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- Colorado Municipal League Elected Officials Luncheon, 2018
- Missouri Municipal League Elected Officials Conference, 2018
- National Public Employers Labor Relations Association, 2018
- Tennessee City Management Association, 2018
- Ohio City Management Association/International City Management Association Midwest Joint Winter Conference , 2018
- Louisiana Municipal Association, 2018
- Florida City County Management Association Winter Summit, 2018
- SGR Servant Leadership Conference, 2018
- Texas Recreation and Parks Society, 2017
- Illinois Public Health Association, 2017
- Tennessee Governmental Finance Officers Association, 2017
- Texas Municipal HR Association, 2017
- Washington Public Employers Labor Relations Association, 2017
- International Personnel Management Association, 2017
- Oklahoma Municipal League, 2017
- Missouri Municipal League, 2017
- Florida League of Cities, 2017
- Michigan City Management Association, 2017
- Texas Municipal Utilities Association, 2017
- Florida City County Management Association, 2017
- International Personnel Management Association Midwest, 2017
- Missouri City Management Association, 2017
- National Public Employers Labor Relations Association, 2017

- Texas Municipal Clerks Association Annual School, 2017
- SGR Leadership Conference, 2017
- Texas City Management Association Regional Meeting, 2016
- Colorado Governmental Finance Officers Association, 2016
- Ohio City Management Association/Ohio Parks and Recreation Association Joint Conference, 2016
- Illinois Public Employer's Labor Relations Association, 2016
- Urban Management Assistant's/Emerging Local Government Leaders Pop Up Conference, 2016
- Texas Fire Marshall's, 2016
- Kentucky League of Cities, 2016
- Missouri Municipal League, 2016
- Florida League of Cities, 2016
- Arizona Parks and Recreation Association Conference, 2016
- Association of Public Safety Communications, 2016
- Texas City Management Association, 2016
- Florida City County Manager's Conference, 2016
- Colorado Emerging Leaders Conference, 2016
- Texas Municipal HR Association, 2016
- Florida City County Management Association, 2016
- Speak at National Public Employers Labor Relations Association, 2016
- Georgia City Management Association, 2016
- New Mexico Society of Human Resource Management, 2016
- Colorado Chapter of International Personnel Management Association, 2016
- Colorado City County Management Conference, 2016
- CPS Annual Conference, 2016
- Ohio Public Employer's Labor Relations Association, 2016
- Emerging Local Government Leaders, 2015
- National Purchasing Institute, 2015
- Public Libraries Association of North Texas, 2015
- Washington Public Employers Labor Relations Association, 2015
- Oregon City Management Association, 2015
- Colorado City Management Association Emerging Leaders, 2015
- Texas Municipal HR Association Nuts and Bolts Workshop, 2015
- National Association of County Clerks and Records, 2015
- Gettysburg Leadership Workshop, 2015
- Association of Washington Cities, 2015
- Texas City Manager's Association, 2015
- International Personnel Management Association Midwest Conference, 2015
- East Texas City Manager's Association, 2015
- Missouri Association of Purchasing Professionals, 2015
- Association of Washington Cities Labor Relations Institute, 2015
- Texas Public Employers Labor Relations Association, 2015

- Dallas Office of the FBI on Valuing Workplace Diversity and the Difference Between Bias and Prejudice, 2015
- Government Finance Officers Association of Texas, 2015
- National Public Employers Labor Relations Association, 2015
- Tennessee Government Finance Officers Association, 2015
- Missouri City Clerks, 2015
- Texas Fire Educators Association, 2015
- SGR Servant Leadership Conference, 2015
- National Forum for Black Public Administrators DFW Chapter, 2014
- Public Purchasing Association of North Texas, 2014
- Missouri Intergovernmental Risk Association, 2014
- Texas City Management Association, 2014
- American Public Works Association Midwest, 2014
- Governmental Finance Officers Association, 2014
- National Public Employers Labor Relations Association, 2014
- North Texas Municipal Clerks Association, 2014
- National Institute for Governmental Purchasing Lone Star Conference, 2014
- Missouri Municipal Clerks and Finance Officers Association, 2014
- South Texas City Manager's Association 2014
- Urban Counties Annual Conference, 2014
- SGR Annual Conference on Creating a Learning Organization, 2014
- National Public Employers Labor Relations Association Annual Conference, 2013
- National Parks and Recreation Annual Conference 2013
- Missouri Municipal League Annual Conference, 2013
- Washington City/County Management Association Annual Conference, 2013
- Nebraska City/County Management Association Annual Conference, 2013
- Tennessee Municipal League Annual Conference, 2013
- Texas City Manager's Association Annual Conference, 2013
- Government Finance Officers Association of Texas Annual Conference, 2013
- American Public Works Association Regional Conference, 2013
- Kansas Public Works Association Annual Conference, 2013
- Texas Recreation and Parks Association Annual Conference, 2013
- Texas Public Purchasing Association Annual Conference, 2013
- Colorado City County Management Association Annual Conference, 2013
- Kansas City County Management Association Annual Conference, 2012
- National Parks and Recreation Management School, 2012
- Texas City Management Study Group, 2012
- International City County Management Association Annual Conference, 2012
- National Procurement Institute, 2012
- Missouri Municipal League Annual Conference, 2012
- Texas City Clerk's Association Annual School, 2012
- Texas County Clerk's Association Annual School, 2012
- Kansas Governmental Finance Officers Association Annual Conference, 2011



- Texas City Management Association Annual Conference, 2010
- Public Risk Management Assoc. Annual Conference, 2010
- Oklahoma City Manager's Association Annual Conference, 2010
- Northwest States City Management Association Annual Conference, 2010
- Ohio City/County Management Assoc. Annual Conference, 2009
- West Texas City Management Association Annual Training Conference, 2009
- Texas Municipal League Regional Meeting, 2009
- Texas Municipal Human Resources Association Annual Nuts and Bolts Conference, 2009
- East Texas City Management Association Annual Training Conference, 2008
- East Texas City Management Association Annual Training Conference, 2007
- International City/County Management Association Conference, 2006
- Certified Public Manager Program, 2006
- North Texas Municipal Clerks Association Management Institute, 2006
- City of Carrollton, Texas, Leadership Academy, 2006
- City of Arlington, Texas, Leadership Academy, 2005
- Urban Management Assistants of North Texas Annual One Day Conference, 2005
- Leadership Southwest, 2004, 2006, 2008
- International City/County Management Association Annual Conference, 2003
- Keynote Speaker (along with the Deputy Secretary of Defense), Government Electronics and Information Technology Association Information Technology and Defense Electronics Forecast Annual Conference – State and Local Homeland Security, 2002
- Transforming Local Government Conference, 2001
- National Association of Counties Annual Conference, 1999
- World Services Congress – Building Public Private Partnerships, 1999
- Central Texas City Management Association, 1999
- Carolinas-Virginia Hospital Trustee/Physician Conference, 1999
- Quorum Ohio CEO Conference, 1999
- Chairman of the Board In-Service Training, Quorum, 1999
- Quorum Foundations for the Future, 1999
- Quorum Chairman of the Board Training, 1998
- International City County Management Association, 1998
- Iowa Municipal Management Institute, 1997
- Quorum Foundations for the Future, 1997
- Quorum Board of Trustees Training, 1997
- Urban Management Assistants of North Texas, Conference of Minority Public Administrators, and National Forum for Black Public Administrators Workshop – 1996
- Innovation Groups Regional Conference, 1996
- Texas City Management Association Annual Conference, 1996
- Florida City/County Management Assoc. Annual Conference, 1996
- North Carolina City/County Management Association Annual Conference, 1996
- Quorum Foundations for the Future, 1996
- International City/County Management Association Conference, 1996
- Texas City Management Association Conference, 1995

- Kansas Innovation Groups Regional Workshop, 1995
- City-County Communications & Marketing Association National Conference, 1994
- National League of Cities Innovations in Government National Conference, 1994
- Innovation Groups Regional Workshop, 1994
- Texas Foundation for the Improvement of Local Government Institute, 1994

#### **OTHER HONORS AND ACTIVITIES**

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- American MENSA member
- Distinguished Alumni, Abilene Christian University
- Abilene Christian University Public Administration Visiting Committee
- Texas Tech University, Center for Public Service, Alumni of the Year

**TAB 11**



OKLAHOMA MUNICIPAL LEAGUE

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# EXECUTIVE DIRECTOR

## About OML

The Oklahoma Municipal League (OML) is a nonprofit, nonpartisan association representing over 450 Oklahoma cities and towns working together for their mutual benefit. The OML represents more than 97 percent of Oklahoma's municipal population and serves as the individual and collective voice of local government officials in interactions at both the state and national levels.

Organized in 1913, OML's purpose is to promote the general welfare of cities and towns and their citizens and to foster or conduct, alone or in cooperation with others, assistance that will provide for the improvement and increased efficiency of city and town government. The League provides services and programs to its members to assist them in better serving their citizens and communities and acts as a central clearinghouse to offer information and services that individual cities and towns do not have the time, money, or expertise to provide alone.

OML is governed by a 20-member Board of Directors consisting of elected and appointed city and town officials that meets regularly to set OML's priorities and to direct the staff. The Board members are elected at the annual conference. Legislative direction is determined by the delegates attending the conference through adoption of specific issues in a statement policy. The League's offices are located at 201 N.E. 23rd Street in Oklahoma City, one block west of the State Capitol.

## About the Executive Director Position

The Executive Director reports to and is hired by the Board of Directors. The position has full management responsibility over the League's 13 employees and annual gross income of \$2,156,441. The Executive Director may appoint task forces to advise him/her on various policy issues.

Duties of the Executive Director include:

- Serving as the Secretary of the League and to the Board of Directors
- Directing and administering the affairs of the League
- Executing all policies of the Board of Directors
- Executing all documents authorized by the Board of Directors
- Supervising the collection of all monies due the League and authorizing their disbursement
- Making an accounting each year at the annual business meeting of the League finances
- Making and maintaining a surety bond in an amount fixed by the Board of Directors
- Keeping records and reports of League activities
- Authorizing the appointment and removal of all employees
- Functioning as editor-in-chief of all publications issued by the League
- Supervising and reporting to the Board of Directors regarding programs of interlocal cooperation and multi-jurisdictional governmental action by municipalities pursuant to State Statutes and under the powers of the League
- The Executive Director should develop and/or promote ideas for growth to the OML Board

# VISION

The OML is recognized as THE respected voice of Oklahoma municipalities in the State Legislature and the authoritative source for legislative and other information for member organizations.

# MISSION

To provide services and programs required by municipal officials to assist them in better serving their citizens, and to act as the representative of Oklahoma municipalities in interactions requiring a united voice.

# SERVICES PROVIDED BY OML

OML staff has a great deal of experience in the areas of legislative, legal, meeting planning, marketing, communications, training, finance, accounting, and research. The League provides a variety of services to its member municipalities and their officials.

**Legislative Representation.** One of the League's primary responsibilities is to represent the viewpoint of its member cities and towns at the state legislature. During each legislative session, hundreds of bills are introduced that affect municipal government. These measures are followed on a day-to-day basis. Many of them are actively supported or opposed, and developments are reported to our membership during the session. Staff works with both state and federal officials who develop the rules used to implement legislation to assure that policies and programs are compatible with and meet the needs of our cities and towns. The League supports legislation which will materially assist municipalities in their daily operations and opposes bills which would be detrimental to local government operations. OML also works to bring to public attention the issues confronting city and town officials and their impact on Oklahomans who live in municipalities. In addition, League representatives appear in appellate court, with the Board's approval, on cases that can have a statewide effect on municipal government.

**Communications.** OML maintains constant contact with city and town officials through phone calls, emails, publications, distribution of legislative reports, and visits to city halls.

**Conferences and Training.** OML conducts many training events throughout the year, as well as an annual conference and exposition,

to provide specialized educational and training opportunities for municipal officials. The League also coordinates district meetings.

**Inquiry Assistance.** Inquiry assistance provided by the League may range from a simple telephone consultation to more extensive research involving considerable time and effort. OML answers inquiries from all municipal officials and employees who are calling about matters within their official responsibilities.

**Research and Publications.** The OML Research Department provides annual publications on budgetary conditions, utility rates, and salaries and benefits for Oklahoma municipalities. The Research Department also gathers information to publish special reports on municipal issues. Publications issued by the League include special reports, an annual salary and benefits survey, an annual municipal utility costs survey, a directory of city and town officials, labor bulletins, an OML Handbook, an OML Insight newsletter, and an OML Advocate legislative bulletin.

**Legal Assistance.** Staff legal counsel provide information and assistance to city attorneys, draft legislation, and file amicus curiae briefs on behalf of member cities and towns in cases of general interest to Oklahoma cities and towns.

**Certification Programs.** OML offers Certified Municipal Official, Certified Municipal Clerk, and Certified Municipal Court Clerk Programs to enable municipal officials to obtain professional certification in recognition for the various training events they attend.

**Member Benefits.** Any incorporated city or town is eligible for general

membership by paying an annual service fee set by the Board of Directors. Through membership in OML, cities and towns may participate in the Oklahoma Municipal Retirement Fund, WEOKIE Credit Union, and Municipal Assurance Group.

**Secretariat Groups.** OML provides secretariat services to many statewide municipal groups. These include the Oklahoma Association of Municipal Attorneys (OAMA), Oklahoma Municipal Judges Association (OMJA), Mayors Council of Oklahoma (MCO), Oklahoma Code Enforcement Association (OCEA), and Municipal Clerks & Treasurers (MC&T). OML provides a staff liaison to advise each group's Board of Directors, hosts Board of Directors meetings at OML, publishes group newsletters at regular intervals, provides record keeping services for membership and individual certification programs, and organizes training events for the groups, including collecting registrations, creating and constructing instructional materials and packets, locating meeting places, and providing guest speakers and instructors.

**Labor Relations Program.** The League keeps members apprised of the latest developments in issues critical to cities with employees who are labor union members.

**Oklahoma Municipal Utility Providers (OMUP).** OMUP was established to assist OML members in coordinating and implementing a unified response to municipal water issues and future conflicts with rural water districts. OMUP acts primarily as a legislative action group. OMUP, in conjunction with OML lobbyists, will review proposed legislation and act as "outside experts" to advise OML as needed.





## Ideal Candidate

The OML Board of Directors is seeking an Executive Director with a proven track record in executive leadership and visionary thinking. The successful candidate must have the ability to oversee and successfully administer programs related to lobby initiatives and member services/relations. The ideal candidate will have substantive knowledge about, and direct experience in, local government and intergovernmental relations, preferably in Oklahoma.

The ideal candidate will be a good listener with a reputation of integrity. It will be essential for the new Executive Director to work well with OML members of all sizes and understand their needs and pressures, both as individual city officials and as communities.

The new Executive Director must be nonpartisan with the ability to work with people of various political persuasions. The ideal candidate will be experienced in building and nurturing professional relationships across party lines. A demonstrated record of organizational leadership and consensus building is essential. It will be important for the new Executive Director to work collaboratively with diverse groups to achieve common goals.

The next Executive Director will be skilled in strategic planning and articulate in advocating the position of the League and its members. This is a highly visible and public position and requires an individual with outstanding communication and leadership skills. The ideal candidate will be an effective public speaker who is skilled in media relations.

The ideal candidate will be a creative thinker and an innovative problem solver and will utilize those skills to further the mission of the League. The ideal candidate will have the educational and intellectual background necessary to provide perspective on existing issues and

to anticipate future issues and respond to changing member needs.

The successful candidate will have experience in developing and administering an annual budget. An important focus for the next Executive Director will be diversifying OML's revenue sources and ensuring that OML funds are spent in the most effective and efficient manner. The successful individual will be enthusiastic about public service and about living and working in Oklahoma.

## Education and Experience

This position requires a bachelor's degree and five or more years of executive management experience in a local government-focused organization with a policy-making body. The successful candidate will have a thorough understanding of local governments and the state legislative process. A master's degree in public administration is preferred. Previous work experience in Oklahoma and working with municipal associations is a plus. A background in municipal management is preferred. An equivalent combination of education and experience may also be considered.

## Compensation and Benefits

The League provides a competitive salary and an excellent benefits package which includes healthcare, vision, and retirement. Employees do not pay into Social Security and there is no employee contribution to the retirement system. The League makes the entire contribution for the employee. Employees earn 3% of the last 60 months of pay to a cap of 22 years of service.

# Application Process

Please apply online at:  
<http://bit.ly/SGRCurrentSearches>

For more information on this position contact:

**Ron Holifield, CEO**  
Strategic Government Resources  
[Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)  
214-676-1691



The Oklahoma Municipal League is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check.

## Resources

**Oklahoma Municipal League**  
[www.oml.org](http://www.oml.org)

**Oklahoma City Convention  
& Visitors Bureau**  
[www.visitokc.com](http://www.visitokc.com)

**2016 Sine Die**  
[bit.ly/OML2016SineDie](http://bit.ly/OML2016SineDie)







# CITY MANAGER

*City of Topeka Kansas*



EXECUTIVE SEARCH PROVIDED BY STRATEGIC GOVERNMENT RESOURCES

# The Community



Ideally situated along the Kansas River, Topeka is the capital of Kansas, covering 60.46 square miles, and is located along I-70, approximately 60 miles from Kansas City. The City is home to over 127,000 residents and is part of a metro area that consists of the counties of Shawnee, Jackson, Jefferson, Wabaunsee, and Osage, with a population of over 230,000. Topeka is the fifth largest city in Kansas behind Wichita, Overland Park, Olathe, and Kansas City, and is the seat of Shawnee County. Residents of Topeka enjoy a high quality of life, exceptional services and amenities, and ample, affordable housing.

Topeka was founded in 1854 and incorporated in 1857. Both the Oregon and Santa Fe trails came to and through Topeka. Topekans treasure the City's heritage from the Civil War era, and its global recognition as the home of the landmark US Supreme Court case *Brown v. Topeka Board of Education*, which outlawed discrimination in schools. Topeka has a long history of freedom and opportunities for all, including a profound belief in the rights of all to speak up about what they believe.

Over the years, the City has grown into a thriving commerce hub with a pro-business attitude that encourages sustainable economic development and entrepreneurship. The area's major employers are the State of Kansas, Stormont-Vail HealthCare, Topeka Public Schools, BlueCross BlueShield

of Kansas, St. Francis Health, Goodyear Tire & Rubber Company, and Burlington Northern Santa Fe Railroad. Topeka is headquarters to national and international companies, including Hill's Pet Nutrition, Payless ShoeSource, and Security Benefit and local companies that have grown to that level such as Advisors Excel and American Home Life Insurance. With a cost of living and cost of doing business that are well-below the national average, Topeka is an ideal location for businesses. Recent significant economic developments include a new Target Distribution Center and the opening of a MARS Chocolate North America manufacturing plant, as well as a Home Depot Rapid Deployment Distribution Center and a Bimbo Bakeries USA facility.

The core downtown is at the completion stage of over \$11 million in public and private redevelopment on Kansas Avenue. Building upon the downtown revitalization initiative is a proposed \$8.6 million public plaza at the intersection of Kansas Avenue and 7th Street which is in the final financing stages. The Cyrus Hotel development is also under construction, featuring a 79 room boutique hotel and restaurant. The Kansas State Capitol Building recently underwent a significant renovation and is a major visitor attraction. NOTO (North Topeka) is emerging as a redeveloped arts area north of the Kansas River. This historic downtown district features an assortment of eclectic art galleries, antiques, clothing stores, and is a hub of the

## The Community CONTINUED

City's First Friday Art Walk, a popular event attracting visitors throughout the region. The Topeka Zoo has two major capital projects in the late planning stages: the \$4 million Camp Cowabunga Safari Exhibit, scheduled to open in 2018, and a \$6 million Kay's Asian Garden & Event Center, scheduled for completion in 2019. Heartland Park, an NHRA-sanctioned racetrack with a road course, drag strip, motocross, and dirt track, reopened under new ownership in 2016 and has a full, exciting 2017 schedule including the NHRA Nationals in May.

Topeka students are served by six school districts, including two magnet schools in the Topeka Public Schools, District #501: Scott Dual Language and Williams Science & Fine Arts. There are also several private and parochial schools in the area, including Topeka Collegiate and Cair Paravel-Latin School. For those seeking higher education, there are several top-notch universities in the area. Washburn University's 160-acre primary campus and Washburn Tech campus offer over 200 programs with 1,300 degrees and serve 7,000 students. Other area colleges include Baker University, Rasmussen College, Friends University, and Bryan University. Additionally, Kansas State University, the University of Kansas, Emporia State University, and several community colleges are within commuting distance.

The area is served by several state-of-the-art healthcare facilities. Stormont Vail Health is a regional medical center that includes primary care and specialty physicians as part of the Mayo Clinic Network and is the area's only Level III Neonatal Intensive Care and trauma center. St. Francis Health is a nonprofit Catholic health care network in the SCL Health System, and the Colmery- O'Neil VA Medical Center provides a full range of medical, surgical, and psychiatric services for veterans.



**MEDIAN HOME VALUE**  
\$96,500



**MEDIAN HOUSEHOLD INCOME**  
\$42,250



**AVERAGE SALES PRICE OF HOMES**  
\$143,686



**RESIDENTIAL PROPERTY**  
is assessed at 11.5% of  
the appraisal value



# Governance and Organization

## VISION:

As the capital city of Kansas, Topeka is recognized as a vibrant community where people choose to live, work, learn, and play and of which Kansans are proud.

## MISSION:

To provide exceptional, cost-effective services in partnership with the community, which add value and enhance the quality of life for all.

## GOAL:

Build citizen satisfaction, confidence, and trust in service delivery and operations management.

## VALUES:

We recognize and value a diverse workforce committed to service to the community.  
We value and believe in:

**Collaboration.** We embrace a spirit of teamwork, empowerment, cooperation, communication, and community involvement.

**Integrity.** We hold ourselves to the highest level of honesty, truthfulness, and ethical conduct.

**Accountability.** We use public resources responsibly and regularly report on the achievement of stated performance objectives.

**Professionalism.** We are committed to ensuring the highest level of professional standards.

**Transparency.** We provide access by the public to timely and reliable information on decisions and performance.

## STRATEGIC PLAN PRIORITIES

SAFE AND SECURE COMMUNITY

THRIVING, LIVABLE  
NEIGHBORHOODS

ORGANIZATIONAL EXCELLENCE

STEWARDSHIP OF THE  
CITY'S PHYSICAL ASSETS

COMMITMENT TO CUSTOMER  
SERVICE

FISCAL HEALTH AND  
SUSTAINABLE GROWTH

Since its founding, Topeka has operated under four forms of government. From 1857 until 1910, Topeka was governed by the mayor-council plan. The commission form of government was adopted in 1910 and remained in effect until 1985 when the strong mayor-city council-chief administrative officer plan was adopted. In 2005, citizens voted for a council-manager form of government. Topeka's first City Manager served from 2006-2011, and its second served from 2012-2016. The City is currently governed by a Mayor and 9 City Council Members elected from districts, each serving 4-year terms with no term limits. The Council votes on ordinances, resolutions, applications, and plats, and considers zoning petitions, receiving reports, and other items. A professional City Manager is hired by the

Council to oversee the delivery of public services. The City's Deputy City Manager and eleven department directors report directly to the City Manager including the Police Chief, Fire Chief, City Attorney, Director of Finance & Administrative Services, Human Resources Director, Municipal Judge, Public Works Director, Utilities Director, Director of Neighborhood Relations, Planning Director and the Zoo Director.

Topeka's FY 2017 Adopted Annual Operating Budget is \$288.5 million, including a General Fund of \$101.4 million. The City's budget is recognized by GFOA through their Distinguished Budget Presentation Award. The City's current long-term General Obligation bond rating by Standard & Poor's is AA/Positive, and the current Combined Utility Revenue bond rating by Moody's is Aa3. City residents, in partnership with Shawnee County, approved a 12-year ½ cent sales tax issue in 2015 which provides funding for streets, renovation of the Expocentre, completion of the Bikeways Plan, Zoo improvements, and a comprehensive Joint Economic Development program. Topeka Public Schools are also undergoing a major renovation and development initiative funded by a voter-approved bond issue. Additionally, multi-year transient guest tax commitments are underway for the Sunflower Soccer complex, the Evil Knievel Museum, the historic Jayhawk Theater, historic Constitution Hall, and the proposed Downtown Plaza.

The City provides a full array of municipal services including Police, Fire, Legal, Municipal Court, Utilities (Water, Sewer, and Stormwater), Public Works, Planning, Media Relations, Neighborhood Relations, Information Technology, Fleet, Parking, Cemeteries, Performing Arts, and a Zoo. Services are provided by approximately 1,200 full-time employees, with most employees covered by Civil Service and represented by collective bargaining agreements with seven labor unions.

## The City has outlined these goals for 2017:

- Continue to carry out efficient and effective policies for the City of Topeka
- Create a service-oriented culture in City government
- Continually work to improve and carry out expectations of residents
- Enhance public perception of Topeka as a more enjoyable place to live



# Leadership And Innovation



The next City Manager will face several challenges within the first year and will need to develop long-term strategies to help position Topeka to achieve its goals and realize its mission of providing a high quality of life and exceptional service to its citizens.

Topeka is facing various infrastructure issues that will require the new City Manager's attention. Based upon a recent Pavement Management Study, to maintain Topeka's streets at the current average of 55 Pavement Condition Index (PCI) would require \$19 million per year for the next ten years. There is a community desire to improve the quality of city streets, and to achieve an average 65 PCI would require an additional annual investment of \$14 million over the current amount allocated to street maintenance funded largely through a dedicated ½ cent sales tax levy. Financing strategies to address funding shortfalls will be a high priority for the new City Manager. Water and wastewater capital projects and associated financing are also high on the agenda, funded in part through recent multi-year rate increases. Many of the City's 100 facilities will also require capital upgrades and improvements, with the beginnings of a Comprehensive City Facility Master Plan currently in development. Financing strategies to fund these projects and address funding shortfalls will be a high priority for the new City Manager.

The community has expressed concerns with code enforcement and compliance, especially in some of the older areas of the City. The Neighborhood Services Department logged approximately 10,000 code enforcement cases in 2016 out of a total of roughly 51,000 parcels within the City. Enforcement is performed by eight Code Inspectors, and the City is in the midst of a revamped inspection and enforcement program designed to improve the appearance of various neighborhoods and commercial corridors.

The City has undertaken several initiatives designed to improve services and engage residents. Topeka's Open Government Portal/ Transparency Platform was recently recognized as one of 12 new cities to participate in Bloomberg Philanthropies' What Works Cities initiative—one of the largest-ever philanthropic efforts to enhance the use of data and evidence in the public sector to improve services, inform local decision-making, and engage residents. The City has launched the Topeka Open Performance Portal to provide quick, interactive assessment of the City's key service areas to track performance measurement data. The platform was recognized by Route Fifty as one of its Navigator Award finalists. The City has also recently implemented the SeeClickFix application for residents to request geo-tracked service needs.

Building upon the 2008 Heartland Visioning Initiative which has transformed how the community views itself and is marketed, the Chamber is about to release a broad-based Holistic Economic Development Community Assessment and Strategy which the City and new City Manager will play a significant role in implementing. The six key themes identified in the study include:

1. A Critical Need to Improve Community Pride
2. Threats to a Strong Workforce Go Beyond Population Growth
3. Quality of Place Enhancements Are Needed to Change Outlooks
4. Homegrown Talent: A Need to Connect the Local and Regional Talent Pipeline
5. Enhancing Economic Opportunities Through Existing Strengths
6. Prosperity and Well-being Lag Behind

The complete study can be viewed @ [www.topekashawneecountystrategy.com](http://www.topekashawneecountystrategy.com).

The area's commitment to diversity and inclusion are evidenced through programs such as INCLUDED, backed by GO Topeka and The Greater Topeka Chamber of Commerce involving partnerships and commitments with local businesses to improve and grow their diversity and inclusion initiatives within their own organizations and throughout the community. Other programs include the Chamber's dynamic Forge young professionals division and its programs for minorities and women, and USD 501's Courageous Conversations and Diversity Council, which demonstrates the commitment of local businesses and organizations to help make Topeka's workforce reflective of its population and to bring forward Topeka's heritage of freedom and opportunity for all.

The City will continue to build on business-friendly development services to encourage economic investment in the coming years, and there is a growing desire to develop Topeka's "Sense of Place" as part of an integrated strategy to retain and attract a younger workforce in support of economic development efforts.



# Ideal Candidate

The City of Topeka seeks an energetic, visionary leader who is willing to take calculated risks and pursue outside-the-box strategies to advance both the organization and community. The next City Manager will continually demonstrate a dedication to public service and a strong commitment to the mission, vision, and values of the City. A highly ethical, inclusive, fair-minded manager, the ideal candidate will lead the City, building upon the City's confidence and forward motion in pursuing sustainable growth and economic development.

The City desires a candidate who will excel in helping a diverse governing body achieve consensus on community-wide initiatives and projects and build upon the established organizational base of a relatively young council-manager form of governance. The City Manager will help the City Council, organization, and community implement a cohesive strategic plan, leveraging assistance and support from a variety of engaged community stakeholders and organizations. The ideal candidate will have an established economic development track record and demonstrated

experience in working collaboratively with external community and economic development partners. Experience in developing excellent intergovernmental relationships with both county and state partners will be essential.

A transformative leader with a collaborative management style, the new City Manager will encourage cooperation across departments and foster a culture of accountability. The chosen candidate must possess the leadership skills needed to engage and empower staff without micromanaging. The City Manager will build a strong team by maintaining high morale and inspiring staff to reach their greatest potential. The chosen candidate must have excellent interpersonal and communication skills.

The selected individual should have experience in street and utility capital improvements, progressive labor management practices and collective bargaining, and fiscally conservative finance strategies. A candidate who is comfortable promoting the use of open data and cutting edge technology is strongly desired.

## Education and Experience



### A MASTERS'S DEGREE

in Public Administration or a Closely Related Field



### 10 YEARS

of Progressively Responsible Experience in the Management of Municipal Operations\*



### DEMONSTRATED RECORD

of Effective Staff Management



### STRONG MANAGEMENT

of Budgetary and Financial Matters



### STRONG COMMUNITY RELATIONS



### EXPERIENCE in Working with a Governing Body or Board\*\*



### RESIDENCY is required for this position.

\*Ideally in similar sized organizations and/or complexity.

\*\*Or an equivalent combination of training and experience





# Compensation and Benefits



Competitive Salary  
Dependent on  
Qualifications and  
Experience.



Health Insurance  
Options



Vehicle and cell  
phone allowance



Retirement plan  
administered by the  
Kansas Public Employee  
Retirement System  
(KPERs) with a current  
employer contribution  
of 8.46%, with a 6%  
employee match.

# Application Process

Please apply online at: <http://bit.ly/SGRCurrentSearches>

For more information on this position contact:

**Doug Thomas, Senior Vice President**  
Strategic Government Resources  
[DouglasThomas@GovernmentResource.com](mailto:DouglasThomas@GovernmentResource.com)  
863-860-9314

This position is open until filled. To view the status of this position, please visit:  
<http://bit.ly/SGRCurrentSearches>

The City of Topeka is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check.



# Resources

**City of Topeka**  
[www.topeka.org](http://www.topeka.org)

**JEDO**  
[www.jedoecodevo.com](http://www.jedoecodevo.com)

**MTPO**  
[www.topekampo.org](http://www.topekampo.org)

**Topeka Chamber**  
[www.topekachamber.org](http://www.topekachamber.org)

**Go Topeka**  
[www.gotopeka.com](http://www.gotopeka.com)

**Follow Us**



**TAB 12**



## Background Screening Report

First Check  
 PO BOX 92033  
 Southlake, TX 76092  
 Phone: 888-588-2525 / 888-588-2525  
 Fax: 888-213-9341

FILE NUMBER	70100	REPORT DATE	04-02-2015
REPORT TO	STRATEGIC GOVERNMENT RESOURCES (20002) 1117 Bourland Rd Keller, TX 76248 Phone: 214-676-1691 Fax: -	ORDER DATE	04-02-2015 MELISSA VALENTINE
		TYPE	EXECUTIVE SEARCH - BACKGROUND CHECK

## Application Information

APPLICANT	TESTCASE, JANET	SSN	XXX-XX-6789	DOB	10-05-1962
ADDRESS(ES)	19 FOREST DR	CITY / STATE / ZIP	BEDROCK, TX 75214		

## Identity Development

## Person Search - SSN TRACE/ ADDRESS VERIF

RESULTS	<b>Records Found</b>	SEARCH DATE	04-02-2015 1:48 PM MDT	
SSN SEARCHED	XXX-XX-6789	<b>Applicant Information</b>		
FULL NAME / SSN	DOB	ADDRESS	PHONE	REPORTED DATE(S)
JANET TESTCASE		19 FOREST HILL BEDROCK, TX County: HIDALGO		First: 2015-01-16 Last: 2015-04-02
JANET LYNN TESTCASE	1962-10-05	19 FOREST HILL BEDROCK, TX County: HIDALGO	(954)547-3984	First: 1995-02-13 Last: 2015-04-02
JANET TESTCASE	1962-10-05	19 FOREST HILL BEDROCK, TX County: HIDALGO		First: 1995-02-13 Last: 2015-04-02
JANET L TESTCASE		7863 SLEEPING LILY DR LAS VEGAS, MO 89178 County: JACKSON	(702)812-1460	First: 1991-12-31 Last: 1996-05-23

## SSN Information

SSN	VALID	ISSUED LOCATION	ISSUED DATE RANGE
XXX-XX-6789	Y		1975-1976

WARNING: This search may not be used as the basis for an adverse action on an applicant. It should only be used to verify or correct an applicant's information, or as a tool to further research of public records or other verifications.

## Credit

## Credit Summary

TOTAL TRADELINES	0	30 DAYS LATE	0
CURRENTLY SATISFACTORY	0	60 DAYS LATE	0
CURRENTLY DELINQUENT	0	90 DAYS LATE	0
PREVIOUSLY DELINQUENT	0	NEWEST TRADE	
COLLECTION/CHR OFFS	0/0	OLDEST TRADE	
PUBLIC RECORDS	0	INQUIRIES	0

## Financial Summary

	#	PAYMENT	TTL BALANCE	PAST DUE	UTILIZATION
MORTGAGE	0	\$0	\$0	\$0	
INSTALLMENT	0	\$0	\$0	\$0	
OPEN	0	\$0	\$0	\$0	
REVOLVING	0	\$0	\$0	\$0	
OTHER	0	\$0	\$0	\$0	
	0	\$0	\$0	\$0	

Warning: Use careful judgment the past due column of this financial summary may possibly combine amounts of an original creditor with amounts from a collection agency collecting for the original creditor. A single debt could be included as a trade amount and with the collection agency. In a few cases, this single debt can appear as a judgment in the public records section, as well.

## Variations

## Personal Information Comparison

	NAME	SOC SEC	DOB	AKA							
APPLICANT	TESTCASE, JANET	XXX-XX-6789	10/05/1962								
TU	TESTCASE, JANET	MISMATCH									
<b>Address Comparison</b>											
APPLICANT	ADDRESS			REPORTED							
TU	19 FOREST DR , BEDROCK, TX 75214			04-02-2015							
<b>Employment Comparison</b>											
	COMPANY		POSITION	REPORTED							
		NO EMPLOYERS DEVELOPED									
<b>Credit Bureau Report</b>											
<b>Credit History</b>											
CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE			TYPE TERMS	PRESENT STATUS	E C O A
						30	60	90+			
NO TRADELINES DEVELOPED											
ECOA KEY: B = BORROWER; C = CO-BORROWER; S = SHARED; J = JOINT; U = UNDESIGNATED; A = AUTHORIZED USER											
<b>Public Records</b>											
NO PUBLIC RECORDS DEVELOPED											
<b>Prior Inquiries</b>											
CREDITOR	INQUIRY TYPE	DATE	SRC	KIND OF BUSINESS	ECOA						
NO PRIOR INQUIRIES DEVELOPED											
<b>Repository Remarks</b>											

TU High Risk Fraud Alert: Available and Clear (H01)  
TU A SUMMARY OF YOUR RIGHTS UNDER THE FAIR CREDIT REPORTING ACT

PARA INFORMACION EN ESPANOL, VISITE [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE) O ESCRIBE A LA CONSUMER FINANCIAL PROTECTION BUREAU, 1700 G STREET N.W., WASHINGTON, DC 20006.

THE FEDERAL FAIR CREDIT REPORTING ACT (FCRA) PROMOTES THE ACCURACY, FAIRNESS, AND PRIVACY OF INFORMATION IN THE FILES OF CONSUMER REPORTING AGENCIES. THERE ARE MANY TYPES OF CONSUMER REPORTING AGENCIES, INCLUDING CREDIT BUREAUS AND SPECIALTY AGENCIES (SUCH AS AGENCIES THAT SELL INFORMATION ABOUT CHECK WRITING HISTORIES, MEDICAL RECORDS, AND RENTAL HISTORY RECORDS). HERE IS A SUMMARY OF YOUR MAJOR RIGHTS UNDER THE FCRA. FOR MORE INFORMATION, INCLUDING INFORMATION ABOUT ADDITIONAL RIGHTS, GO TO [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE), OR WRITE TO: CONSUMER FINANCIAL PROTECTION BUREAU, 1700 G STREET N.W., WASHINGTON, DC 20006.

- YOU MUST BE TOLD IF INFORMATION IN YOUR FILE HAS BEEN USED AGAINST YOU. ANYONE WHO USES A CREDIT REPORT OR ANOTHER TYPE OF CONSUMER REPORT TO DENY YOUR APPLICATION FOR CREDIT, INSURANCE, OR EMPLOYMENT - OR TO TAKE ANOTHER ADVERSE ACTION AGAINST YOU - MUST TELL YOU, AND MUST GIVE YOU THE NAME, ADDRESS, AND PHONE NUMBER OF THE AGENCY THAT PROVIDED THE INFORMATION.

- YOU HAVE THE RIGHT TO KNOW WHAT IS IN YOUR FILE. YOU MAY REQUEST AND OBTAIN ALL THE INFORMATION ABOUT YOU IN THE FILES OF A CONSUMER REPORTING AGENCY (YOUR "FILE DISCLOSURE"). YOU WILL BE REQUIRED TO PROVIDE PROPER IDENTIFICATION, WHICH MAY INCLUDE YOUR SOCIAL SECURITY NUMBER. IN MANY CASES, THE DISCLOSURE WILL BE FREE. YOU ARE ENTITLED TO A FREE FILE DISCLOSURE IF:

- A PERSON HAS TAKEN ADVERSE ACTION AGAINST YOU BECAUSE OF INFORMATION IN YOUR CREDIT REPORT;
- YOU ARE THE VICTIM OF IDENTITY THEFT AND PLACE A FRAUD ALERT IN YOUR FILE;
- YOUR FILE CONTAINS INACCURATE INFORMATION AS A RESULT OF FRAUD;
- YOU ARE ON PUBLIC ASSISTANCE;
- YOU ARE UNEMPLOYED BUT EXPECT TO APPLY FOR EMPLOYMENT WITHIN 60 DAYS.

IN ADDITION, ALL CONSUMERS ARE ENTITLED TO ONE FREE DISCLOSURE EVERY 12 MONTHS UPON REQUEST FROM EACH NATIONWIDE CREDIT BUREAU AND FROM NATIONWIDE SPECIALTY CONSUMER REPORTING AGENCIES. SEE [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE) FOR MORE INFORMATION.

- YOU HAVE THE RIGHT TO ASK FOR A CREDIT SCORE. CREDIT SCORES ARE NUMERICAL SUMMARIES OF YOUR CREDIT-WORTHINESS BASED ON INFORMATION FROM CREDIT BUREAUS. YOU MAY REQUEST A CREDIT SCORE FROM CONSUMER REPORTING AGENCIES THAT CREATE SCORES OR DISTRIBUTE SCORES USED IN RESIDENTIAL REAL PROPERTY LOANS, BUT YOU WILL HAVE TO PAY FOR IT. IN SOME MORTGAGE TRANSACTIONS, YOU WILL RECEIVE CREDIT SCORE INFORMATION FOR FREE FROM THE MORTGAGE LENDER.

- YOU HAVE THE RIGHT TO DISPUTE INCOMPLETE OR INACCURATE INFORMATION. IF YOU IDENTIFY INFORMATION IN YOUR FILE THAT IS INCOMPLETE OR INACCURATE, AND REPORT IT TO THE CONSUMER REPORTING AGENCY, THE AGENCY MUST INVESTIGATE UNLESS YOUR DISPUTE IS FRIVOLOUS. SEE [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE) FOR AN EXPLANATION OF DISPUTE PROCEDURES.

- CONSUMER REPORTING AGENCIES MUST CORRECT OR DELETE INACCURATE, INCOMPLETE, OR UNVERIFIABLE INFORMATION. INACCURATE, INCOMPLETE, OR UNVERIFIABLE INFORMATION MUST BE REMOVED OR CORRECTED, USUALLY WITHIN 30 DAYS. HOWEVER A CONSUMER REPORTING AGENCY MAY CONTINUE TO REPORT INFORMATION IT HAS VERIFIED AS ACCURATE.

- CONSUMER REPORTING AGENCIES MAY NOT REPORT OUTDATED NEGATIVE INFORMATION. IN MOST CASES, A CONSUMER REPORTING AGENCY MAY NOT REPORT NEGATIVE INFORMATION THAT IS MORE THAN SEVEN YEARS OLD, OR BANKRUPTCIES THAT ARE MORE THAN 10 YEARS OLD.

- ACCESS TO YOUR FILE IS LIMITED. A CONSUMER REPORTING AGENCY MAY PROVIDE INFORMATION ABOUT YOU ONLY TO PEOPLE WITH A VALID NEED - USUALLY TO CONSIDER AN APPLICATION WITH A CREDITOR, INSURER, EMPLOYER, LANDLORD, OR OTHER BUSINESS. THE FCRA SPECIFIES THOSE WITH A VALID NEED FOR ACCESS.

- YOU MUST GIVE YOUR CONSENT FOR REPORTS TO BE PROVIDED TO EMPLOYERS. A CONSUMER REPORTING AGENCY MAY NOT GIVE OUT INFORMATION ABOUT YOU TO YOUR EMPLOYER, OR A POTENTIAL EMPLOYER, WITHOUT YOUR WRITTEN CONSENT GIVEN TO THE EMPLOYER. WRITTEN CONSENT GENERALLY IS NOT REQUIRED IN THE TRUCKING INDUSTRY. FOR MORE INFORMATION, GO TO [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE).

- YOU MAY LIMIT "PRESCREENED" OFFERS OF CREDIT AND INSURANCE YOU GET BASED ON INFORMATION IN YOUR CREDIT REPORT. UNSOLICITED "PRESCREENED" OFFERS FOR CREDIT AND INSURANCE MUST INCLUDE A TOLL-FREE PHONE NUMBER YOU CAN CALL IF YOU CHOOSE TO REMOVE YOUR NAME AND ADDRESS FROM THE LISTS THESE OFFERS ARE BASED ON. YOU MAY OPT-OUT WITH THE NATIONWIDE CREDIT BUREAUS AT 1-888-567-8688 (888-5OPTOUT).

- YOU MAY SEEK DAMAGES FROM VIOLATORS. IF A CONSUMER REPORTING AGENCY, OR, IN SOME CASES, A USER OF CONSUMER REPORTS OR A FURNISHER OF INFORMATION TO A CONSUMER REPORTING AGENCY VIOLATES THE FCRA, YOU MAY BE ABLE TO SUE IN STATE OR FEDERAL COURT.

- IDENTITY THEFT VICTIMS AND ACTIVE DUTY MILITARY PERSONNEL HAVE ADDITIONAL RIGHTS. FOR MORE INFORMATION, VISIT [WWW.CONSUMERFINANCE.GOV/LEARNMORE](http://WWW.CONSUMERFINANCE.GOV/LEARNMORE).

STATES MAY ENFORCE THE FCRA, AND MANY STATES HAVE THEIR OWN CONSUMER REPORTING LAWS. IN SOME CASES, YOU MAY HAVE MORE RIGHTS UNDER STATE LAW. FOR MORE INFORMATION, CONTACT YOUR STATE OR LOCAL CONSUMER PROTECTION AGENCY OR YOUR STATE ATTORNEY GENERAL. FOR INFORMATION ABOUT YOUR FEDERAL RIGHTS, CONTACT:

TYPE OF BUSINESS:	CONTACT:
1. a. BANKS, SAVINGS ASSOCIATIONS, AND CREDIT UNIONS WITH TOTAL ASSETS OF OVER \$10 BILLION AND THEIR AFFILIATES	BUREAU OF CONSUMER FINANCIAL PROTECTION 1700 G STREET NW WASHINGTON, DC 20006
b. SUCH AFFILIATES THAT ARE NOT BANKS, SAVINGS ASSOCIATIONS, OR CREDIT UNIONS ALSO SHOULD LIST, IN ADDITION TO THE BUREAU:	FEDERAL TRADE COMMISSION CONSUMER RESPONSE CENTER -FCRA WASHINGTON, DC 20580 1-877-382-4357
2. TO THE EXTENT NOT INCLUDED IN ITEM 1 ABOVE:	OFFICE OF THE COMPTROLLER OF THE CURRENCY
a. NATIONAL BANKS, FEDERAL SAVINGS ASSOCIATIONS, AND FEDERAL BRANCHES AND FEDERAL AGENCIES OF FOREIGN BANKS	CUSTOMER ASSISTANCE GROUP 1301 MCKINNEY STREET, SUITE 3450 HOUSTON, TX 77010-9050 1-800-613-6743
b. STATE MEMBER BANKS, BRANCHES AND AGENCIES OF FOREIGN BANKS (OTHER THAN FEDERAL BRANCHES, FEDERAL AGENCIES AND INSURED STATE BRANCHES OF FOREIGN BANKS), COMMERCIAL LENDING COMPANIES OWNED OR CONTROLLED BY FOREIGN BANKS, AND ORGANIZATIONS OPERATING UNDER SECTION 25 OR 25A OF THE FEDERAL RESERVE ACT	FEDERAL RESERVE CONSUMER HELP (FRCH) PO BOX 1200 MINNEAPOLIS, MN 55480 1-888-851-1920 WEBSITE ADDRESS: <a href="http://WWW.FEDERALRESERVECONSUMERHELP.GOV">WWW.FEDERALRESERVECONSUMERHELP.GOV</a> EMAIL ADDRESS: <a href="mailto:CONSUMERHELP@FEDERALRESERVE.GOV">CONSUMERHELP@FEDERALRESERVE.GOV</a>
c. NONMEMBER INSURED BANKS, INSURED STATE BRANCHES OF FOREIGN BANKS, AND INSURED STATE SAVINGS ASSOCIATIONS	FDIC CONSUMER RESPONSE CENTER 1100 WALNUT STREET BOX #11 KANSAS CITY, MO 64106
d. FEDERAL CREDIT UNIONS	NATIONAL CREDIT UNION ADMINISTRATION OFFICE OF CONSUMER PROTECTION (OCP) DIVISION OF CONSUMER COMPLIANCE AND OUTREACH (DCCO) 1775 DUKE STREET ALEXANDRIA, VA 22314 1-703-519-4600
3. AIR CARRIERS	ASST. GENERAL COUNSEL FOR AVIATION ENFORCEMENT & PROCEEDINGS DEPARTMENT OF TRANSPORTATION 400 SEVENTH STREET SW WASHINGTON, DC 20590 1-202-366-1306

- 4. CREDITORS SUBJECT TO SURFACE TRANSPORTATION BOARD  
OFFICE OF PROCEEDINGS, SURFACE TRANSPORTATION BOARD  
DEPARTMENT OF TRANSPORTATION  
1925 K STREET NW  
WASHINGTON, DC 20423
- 5. CREDITORS SUBJECT TO PACKERS AND STOCKYARDS ACT  
NEAREST PACKERS AND STOCKYARDS  
ADMINISTRATION AREA SUPERVISOR
- 6. SMALL BUSINESS INVESTMENT COMPANIES  
ASSOCIATE DEPUTY ADMINISTRATOR FOR CAPITAL ACCESS  
UNITED STATES SMALL BUSINESS ADMINISTRATION  
406 THIRD STREET, SW, 8TH FLOOR  
WASHINGTON, DC 20416
- 7. BROKERS AND DEALERS  
SECURITIES AND EXCHANGE COMMISSION  
100 F ST NE  
WASHINGTON, DC 20549
- 8. FEDERAL LAND BANKS, FEDERAL LAND BANK ASSOCIATIONS, FEDERAL INTERMEDIATE CREDIT BANKS, AND PRODUCTION CREDIT ASSOCIATIONS  
FARM CREDIT ADMINISTRATION  
1501 FARM CREDIT DRIVE  
McLEAN, VA 22102-5090
- 9. RETAILERS, FINANCE COMPANIES, AND ALL OTHER CREDITORS NOT LISTED ABOVE  
FTC REGIONAL OFFICE FOR REGION IN WHICH THE CREDITOR OPERATES OR FEDERAL TRADE COMMISSION: CONSUMER RESPONSE CENTER- FCRA  
WASHINGTON, DC 20580  
1-877-382-4357

**Source Information**

**Creditors**

CREDITOR	SUB CODE	ADDRESS	PHONE
NO CREDITORS DEVELOPED			

**Submission Results**

APPLICANT	BUREAU	DATE	RESULT
APPLICANT	TRANSUNION	04-02-2015 02:39:39 PM	NO RECORD FOUND

**Repository Referral**

TransUnion Consumer Relations  
www.transunion.com/myoptions  
2 Baldwin Place  
P.O. Box 1000  
Chester, PA 19022  
800-888-4213

**Comments**

**\*\*\* End of Credit Report \*\*\***

**Investigative**

**County Criminal Records Search**

RESULTS	Records Found	SEARCH DATE	SEARCH SCOPE
NAME SEARCHED	TESTCASE, JANET	04-02-2015 1:50 PM MDT	
DOB SEARCHED	10-05-1962		10 years
JURISDICTION	TX-HIDALGO		

**\*\*\* Abstract \*\*\***

NAME ON RECORD	JANET L TESTCASE	CASE NUMBER	CR- 1234565656
DOB ON RECORD	10/05/1962	COURT	DISTRICT
OTHER IDENTIFIERS		FILE DATE	03/04/2010
OTHER INFO			

**Count-1**

TYPE	MISD CLASS B	OFFENSE	DRIVING WHILE INTOXICATED
DISPOSITION	CONVICTED		
DISPOSITION DATE	10/01/2010	OFFENSE DATE	03/04/2010
SENTENCE	18 MOS PROBATION/ \$1000.00 FINE		
OTHER INFO	PROBATION EXPIRED: 04/06/2012		
COMMENT			

WARNING: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'Records Found' means that our researchers found a record(s) in that jurisdiction that matched the personal identifiers (i.e., Name, SSN, Date of Birth, Address) listed for the subject in the above abstract. First Check does not guarantee the accuracy or truthfulness of

the information as to the subject of the investigation, but only that it is accurately copied from public records. Information generated as a result of identity theft, including evidence of criminal activity, may be inaccurately associated with the consumer who is the subject of this report. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

**COUNTY WANTS AND WARRANT**


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NO REPORTABLE RECORDS FOUND - DALLAS COUNTY  
JANET TESTCASE

---

**State Criminal Records Search**


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RESULTS	<b>No Reportable Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:46 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	10 years
JURISDICTION	TEXAS		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

**Federal Criminal Records Search**


---

RESULTS	<b>No Reportable Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:47 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	10 years
JURISDICTION	TEXAS NORTHERN		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

**InstaCriminal National Search**


---

RESULTS	<b>No Reportable Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:30 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	
JURISDICTION	NATIONWIDE		
JURISDICTION(S) SEARCHED			

The search you have selected is a search of our criminal database(s) and may not represent 100% coverage of all criminal records in all jurisdictions and/or sources. Coverage details available upon request.

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by federal and state law. 'No Reportable Records Found' means that our researchers could not locate a record that matched at least two personal identifiers (i.e., Name, SSN, Date of Birth, Address) for the subject in that jurisdiction. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

**Global Homeland Security Search**


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RESULTS	<b>No Reportable Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:30 PM MDT
SOURCES	Alabama Medicaid - Suspended Providers, America's Most Wanted Fugitive List, Australia Sex Offender Registry, Australian Dept of Foreign Affairs and Trade - Sanctions List, Australian Reserve Bank Sanctions List, Bank of England Sanctions List, California Medi-Cal - Suspended and Ineligible Providers, Connecticut Dept of Social Services - Admin Actions List, DEA Diversion Control Program - Admin Actions against Doctors, DEA Diversion Control Program - Cases against Doctors, Delaware Adult Abuse Registry, Directorate of Defense Trade Controls - Debarred Parties List, European Union Terrorism Sanctions List, FDA Office of Regulatory Affairs - Debarment List, FDA Office of Regulatory Affairs - Warning Letters, Federal Deposit Insurance Corporation (FDIC) - Failed Bank List, Federal Deposit Insurance Corporation (FDIC) - Enforcement Decisions and Orders, Federal Reserve Board - Enforcement Actions, FinCEN - Enforcement Actions, FINRA - Disciplinary Actions, Florida Medicaid - Sanctioned Providers, Fugitive List, Health Resources and Services Administration - Health Education Assistance Loan - Defaulted Borrowers, HM Treasury - Consolidated List of Financial Sanctions, HM Treasury - Investment Ban List, Hong Kong Securities and Futures Commission (SFC) - Enforcement Actions, HUD - Limited Denials of Participation List, Idaho Medicaid Provider - Exclusion List, Illinois Casino Exclusion List, Illinois Office of Inspector General - Sanctioned Providers, Immigration and Customs Enforcement (ICE) - Most Wanted, Interpol Most Wanted, Japan Ministry of Economy, Trade, and Industry (METI) - End User List, Kansas Dept of Health and Environment - Abuse Registry, Kentucky Medicaid - Excluded Providers, Maryland Medicaid - Exclusion List, MIPT Terrorism Knowledge Base, Mississippi Medicaid - Excluded Providers, Missouri Casino Exclusion List, Monetary Authority of Singapore - Enforcement Actions, National Credit Union Administration (NCUA) - Administrative Orders, Naval Criminal Investigative Service (NCIS) - Most Wanted Fugitives, Nevada Gaming Control Board - Excluded Person List, New Jersey Casino Exclusion List, New Jersey Dept of Treasury - Debarment List, New York Office of the Medicaid Inspector General - Exclusion List, New York Stock Exchange Regulation - Disciplinary Actions, Office of Foreign Assets Control (OFAC) - Specially Designated Nationals List, Office of Inspector General (OIG) - Health and Human Services Exclusion List, Office of Inspector General (OIG) - Most Wanted Health Care Fugitives, Office of Regulatory Affairs - Disqualified, Restricted and Assurances List for Clinical Investigators, Office of Research Integrity - Public Health Service - Administrative Actions List, Office of the Comptroller of Currency (OCC) - Enforcement Actions List, Office of the Superintendent of Financial Institutions (OSFI) - Canadian Sanctions List, Office of Thrift Supervision (OTS) - Enforcement Actions List, Ohio		

Medicaid - Sanctioned Providers, Ohio Medicaid - Suspended Providers, Palestinian Legislative Council List, Pennsylvania Medichcek - Precluded Providers List, Politically Exposed Persons List, SEC - Enforcement Actions, South Carolina Medicaid - Excluded Providers, Tennessee Dept of Health - Abuse Registry, Texas Employee Misconduct Registry, Texas Health and Human Services Commission Medicaid and Title XX Provider Exclusion List, TRICARE Sanctions List, UK Disqualified Directors List, United Nations Consolidated Sanctions List, US Commodity Futures Trading Commission (CFTC) - Disciplinary Actions, US Dept of Commerce - Denied Persons, Unverified, and Entity List, US Dept of Labor - Forced and Child Labor List, US Dept of State - Foreign Terrorist Organizations List, US Dept of State - Nonproliferation Sanctions, US Dept of State - Terrorist Exclusion List, US Dept of Treasury - Primary Money Laundering Concern List, US General Services Administration (GSA) - Excluded Parties List, World Bank Listing of Ineligible Individuals

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by applicable laws. 'No Reportable Records Found' means that our researchers could not locate a record that matched. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

#### Sex Offender Records Search

---

RESULTS	<b>No Reportable Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:47 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	
JURISDICTION	TEXAS		

CAUTION: Based on the information provided First Check searched for public records in the sources referenced herein for criminal history information as permitted by applicable laws. 'No Reportable Records Found' means that our researchers could not locate a record that matched. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

---

#### County Civil Records Search

---

RESULTS	<b>Records Found</b>		
NAME SEARCHED	TESTCASE, JANET	SEARCH DATE	04-02-2015 1:42 PM MDT
DOB SEARCHED	10-05-1962	SEARCH SCOPE	7 years
JURISDICTION	MO-OSAGE		

\*\*\* Abstract \*\*\*

PLAINTIFF	JANET TESTCASE	CASE NUMBER	CV556566
DEFENDANT	CITY OF ROCKY ROAD	COURT NAME	COUNTY CT 456
FILE DATE	07/15/2011	JURISDICTION	
PLAINTIFF ATTORNEY	MARK A FISHER	CASE TYPE	CIVIL - HARASSMENT
DISPOSITION DATE	06/12/2012	DISPOSITION	JUDGMENT
COMMENT			

WARNING: Based on the information provided First Check searched for public records in the sources referenced herein for civil history information as permitted by federal and state law. 'Records Found' means that our researchers found a record(s) in that jurisdiction that matched the personal identifiers (i.e., Name, SSN, Date of Birth, Address) listed for the subject in the above abstract. First Check does not guarantee the accuracy or truthfulness of the information as to the subject of the investigation, but only that it is accurately copied from public records. Information generated as a result of identity theft, including evidence of civil activity, may be inaccurately associated with the consumer who is the subject of this report. Further investigation into additional jurisdictions, or utilization of additional identifying information, may be warranted. Please call for assistance.

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#### Credentials

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##### Education Verification

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RESPONSE RECEIVED	<b>Yes</b>		
INSTITUTION NAME	UNIVERSITY OF SYRACUSE	SEARCH DATE	04-02-2015 1:51 PM MDT
CITY, STATE	SYRACUSE, NY	CONTACT	WRITTEN/ SC
INSTITUTION PHONE	N/A	SUBJECT	JANET TESTCASE
INSTITUTION FAX			
INSTITUTION EMAIL			
SOCIAL SECURITY	SUBJECT-PROVIDED INFORMATION	INSTITUTION-PROVIDED INFORMATION	
DATES CLAIMED	MAY 2013	123-45-6789	
DEGREE(S) CLAIMED	MASTERS OF PUBLIC ADMIN	DATE AWARDED: 05/15/2013	
MAJOR(S) CLAIMED	PUBLIC ADMINISTRATION	MASTERS PUBLIC ADMIN	
GPA CLAIMED		PUBLIC ADMINISTRATION	
HONORS CLAIMED			
ATTENDING NAME			
COMMENTS			

---

#### Instant Driving Records

---

RESULTS	<b>License Found</b>
---------	----------------------



STATE OF ISSUE Texas  
LICENSE NUMBER 09555186  
SEARCH DATE 04-02-2015 1:37 PM MDT  
License Number: 01234567  
License State: TX  
Full Name: TESTCASE, JANET  
DOB: 1962-10-05  
Address: 19 FOREST DRIVE BEDROCK, TX 79501

**License Info**

Status: CLEAR  
Class: C  
Class Description: Non-Comm. C - Single or comb veh , not in class A or B  
Expiration Date: 2018-10-05  
Original Issue Date: 1978-03-16

**Other License Info**

Report Message: NO ENTRIES FOUND FOR THIS PERSON  
MVR Status: MVR found  
MVR History Length: 3  
MVR Score: A valid driver license (active, clear, eligible, valid, etc) with at least 3 years of history and a clear MVR. (0)

**Messages**

Alert: Requested last name(TESTCASE) did not match.  
Commercial Driver License (CDL) Indicator: N  
THIS TYPE OF RECORD WILL NOT REFLECT COMPLETION OF A DRIVING SAFETY COURSE.  
THIS RECORD REFLECTS CONVICTIONS AND CRASH INVOLVEMENTS THAT ARE ALLOWED TO BE DISPLAYED BY LAW.

WARNING: Confidential Information - To Be Used As Per State And Federal Laws. Misuse May Result In A Criminal Prosecution.

## COMPREHENSIVE REPORT

**Subject Information:** (Best Information for Subject)

Name: JANET L TESTCASE DOB: 10/05/1962

SSN: 123-45-xxxx issued in TEXAS between 01/01/1975 and 12/31/1976

Age: 31

**Names Associated With Subject:** 

JANET L TESTCASE LexID: 8071868866 DOB: 1962


JANET TESTCASE LexID: 8071868866 DOB: 10/05/1962  
123-45-xxxx issued in TX**Others Associated With Subjects SSN:** (DOES NOT usually indicate any type of fraud or deception)  
[None Found]**Comprehensive Report Summary:**

Names Associated With Subject:


2 Found

Others Associated With Subjects SSN:


None Found

 Address Summary:

2 Found

 Active Address(es):


1 Found

 Previous & Non-Verified Addr:


1 Found

 Possible Criminal Records:

None Found

 Sexual Offenses:


None Found

 Driver's License:

1 Found

 Motor Vehicles Registered:


1 Found

 Concealed Weapons Permit:


None Found

DEA Controlled Substances:


None Found

 Professional Licenses:


None Found

 Watercraft:


None Found

 Bankruptcies:

None Found

 Liens and Judgments:


None Found

 UCC Filings:

None Found

 Possible Properties Owned:

1 Found

 Possible Associates:


None Found

**Address Summary:** 

19 FOREST DR , BEDROCK, TX 77469-1826, HIDALGO COUNTY ( 1995- Jan 2015)

12924 PECOS RD, KNOXVILLE TX 37934-0885, KNOX COUNTY (Feb 2002 - Jan 2015)

7404 TOWN CENTER BLVD APT 808, ROSENBERG TX 77471-6232, FORT BEND COUNTY (Apr 2011 - May 2014)

**Utility Locator - Connect Date:** 4/28/2011 21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY (Jun 2007 - Oct 2013)

1611 LAUREL AVE APT 303, KNOXVILLE TN 37916-2078, KNOX COUNTY (Oct 2005)

135 WHITE DR APT -2, TALLAHASSEE FL 32304-3090, LEON COUNTY (May 2004 - Jun 2004)

1505 W THARPE ST APT 3632, TALLAHASSEE FL 32303-4575, LEON COUNTY (Sep 2002 - Jan 2004)

**Active Address(es):**  19 FOREST HILL DR, BEDROCK, TX 77406-6453, HIDALGO COUNTY**Name Associated with Address:**

JANET TESTCASE

**Current Residents at Address:**

DAVID TESTCASE

**Property Ownership Information for this Address****Property:**

Parcel Number - 5121-06-001-0320-901

Owner Name: DAVID WTESTCASE LexID: 2561089892

Owner Name 2: JANET TESTCASE LexID: 2561096692

Property Address: - 19 FOREST HILL, BEDROCK TX 77406-6453, HILDAGO COUNTY

Owner Address: 21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY

Sale Date - 05/29/1995

Sale Price - \$325,850

Subdivision Name - LONG MEADOW

Total Market Value - \$467,230

Assessed Value - \$443,810

Land Value - \$89,250

Improvement Value - \$377,980

Land Size - 13,299 Square Feet  
 Year Built - 2006  
 Seller Name: HOUSTON VILLAGE BUILDERS INC  
 Legal Description - LONG MEADOW FARMS SEC 6, BLOCK 1, LOT 32  
 Loan Amount - \$245,000  
 Lender Name - CITIMORTGAGE  
 Data Source - A

**Previous And Non-Verified Address(es):** 

1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY ( 2014 - Jan 2015)

**Name Associated with Address:**

DAVID TESTCASE

**Current Residents at Address:**

STEVEN FRYER

**Property Ownership Information for this Address**

**Property:**

Parcel Number - 6469-03-002-0010-901  
 Owner Name: STEVEN FRYER LexID: 8071868866  
 Property Address - 1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY  
 Owner Address: 1118 MESSINA LN, RICHMOND TX 77469-1826, FORT BEND COUNTY  
 Sale Date - 04/15/2014  
 Seller Name: PULTE HOME OF TEXAS LP  
 Loan Amount - \$149,168  
 Loan Type - NEW CONVENTIONAL  
 Data Source - B

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**Possible Criminal Records:** 

[None Found]

**Sexual Offenses:** 

[None Found]

**Driver's License Information:** 


Name: JANET L TESTCASE  
 LexID: 80718688  
 DL Number: xxxxxxxx  
 State: Texas  
 License Address: 19 FOREST DR, BEDROCK TX 77469-1826, FORT BEND COUNTY  
 DOB: 10/05/1962  
 Potential SSN : 123-45-xxxx  
 Issue Date: 05/09/2014  
 Data Source: Governmental

**Motor Vehicles Registered To Subject:** 

**Vehicle:**

Description: Gray Silver 2006 Toyota Camry - Sedan 4 Door  
 VIN: 4T1BE30K26U67  
 State Of Origin: TEXAS  
 Engine: 4 Cylinder 144 Cubic Inch  
 Anti Lock Brakes: 4 wheel standard  
 Air Conditioning: Standard  
 Daytime Running Lights: Standard  
 Power Steering: Standard  
 Power Brakes: Standard  
 Power Windows: Standard  
 Security System: Immobilizer and Alarm  
 Roof: None / not available  
 Price: 20375  
 Radio: AM/FM CD  
 Front Wheel Drive: Yes  
 Four Wheel Drive: No  
 Tilt Wheel: Unknown  
 Data Source: Governmental

**Registrant(s)**

Record Type: CURRENT  
 Name: JANET L TESTCASE  
 LexID: 8071868866  
 Potential SSN  123-45-xxxx  
 Address: 19 FOREST HILL, BEDROCK TX 77469-1826, FORT BEND COUNTY  
 DOB: 10/05/1962  
 Sex: FEMALE

Tag Number: BD9B1  
 License State: TX  
 Earliest Registration Date: 10/1/2014  
 Latest Registration Date: 10/1/2014  
 Expiration Date: 9/30/2015  
 License Plate Type: Private

**Concealed Weapons Permit:** 

[None Found]

**DEA Controlled Substances:** 

[None Found]

**Professional License(s):** 

[None Found]

**Watercraft:** 

[None Found]

 **Bankruptcies:** 

[None Found]

 **Liens and Judgments:** 

[None Found]

 **UCC Filings:** 

[None Found]

 **Possible Properties Owned by Subject:** 

**Property:**

Parcel Number - 6469-03-002-0010-901  
Owner Name: JANET L TESTCASE LexID: 8071868866  
Property Address - 19 FOREST DR, BEDROCK TX 77469-1826, HIDALGO COUNTY

Sale Date - 04/15/2014  
Seller Name: PULTE HOME OF TEXAS LP  
Loan Amount - \$149,168  
Loan Type - NEW CONVENTIONAL  
Data Source - B

 **Possible Associates:** 

NONE FOUND

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**Disclaimer**

This report is furnished to you pursuant to the Agreement for Service between the parties and in compliance with the Fair Credit Reporting Act. This report is furnished based upon your certification that you have a permissible purpose to obtain the report. The information contained herein was obtained in good faith from sources deemed reliable, but the completeness or accuracy is not guaranteed.

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**\*\*\* End Of Report \*\*\***

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