



PORT ORANGE CITY COUNCIL

SPECIAL MEETING

Council Chambers

Tuesday, December 22, 2020 @ 5:30 PM

SPECIAL MEETING AGENDA

Pursuant to Section 3.06 of the Charter of the City of Port Orange, the Mayor has called a **Special Meeting** of the City Council to be held for the following purposes:

A. OPENING

1. Silent Invocation
2. Pledge of Allegiance
3. Roll Call

B. DISCUSSION / ACTION

4. Resolution No. 20-75 - Calling for a Primary and Special Election to elect a Council Member for District 1 and providing for qualifying dates
5. Interviews and Selection for RFP #21-05 - Executive Search Firms for City Manager Recruitment
 - a. Colin Baenzinger & Associates
 - b. Baker Tilly US, LLP
 - c. Mercer Group Florida
6. Council Direction on Appointment of Interim City Manager Process

C. ADJOURNMENT

NOTICES – PURSUANT TO SECTION 286.0105 OF THE FLORIDA STATUTES, IF ANY PERSON DECIDES TO APPEAL ANY DECISION MADE BY THE CITY COUNCIL WITH RESPECT TO ANY MATTER CONSIDERED AT THIS PUBLIC MEETING OR HEARING, SUCH PERSON WILL NEED A RECORD OF THE PROCEEDINGS, AND THAT, FOR SUCH PURPOSE, SUCH PERSON MAY NEED TO ENSURE THAT A VERBATIM RECORD OF THE PROCEEDINGS IS MADE, WHICH RECORD INCLUDES THE TESTIMONY AND EVIDENCE UPON WHICH THE APPEAL IS TO BE BASED. THE CITY DOES NOT PREPARE OR PROVIDE SUCH A RECORD.



FOR SPECIAL ACCOMMODATIONS, PLEASE NOTIFY THE CITY CLERK'S OFFICE (PHONE: 386-506-5563) AS FAR IN ADVANCE AS POSSIBLE, BUT PREFERABLY WITHIN 2 WORKING DAYS OF YOUR RECEIPT OF THIS NOTICE OR 5 DAYS PRIOR TO THE MEETING OR HEARING DATE.



HELP FOR THE HEARING IMPAIRED IS AVAILABLE THROUGH THE ASSISTIVE LISTENING SYSTEM RECEIVERS CAN BE OBTAINED FROM THE CITY CLERKS' OFFICE.

IN ACCORDANCE WITH THE AMERICANS WITH DISABILITIES ACT (ADA), IF YOU ARE A PERSON WITH A DISABILITY WHO NEEDS AN ACCOMMODATION IN ORDER TO PARTICIPATE IN THIS PROCEEDING, YOU ARE ENTITLED, AT NO COST TO YOU, THE PROVISION OF

City Council Special Meeting

December 22, 2020

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CERTAIN ASSISTANCE. PLEASE CONTACT THE CITY CLERK FOR THE CITY OF PORT ORANGE, 1000 CITY CENTER CIRCLE, PORT ORANGE, FLORIDA 32129, TELEPHONE NUMBER 386-506-5563, CITYCLERK@PORT-ORANGE.ORG, AS FAR IN ADVANCE AS POSSIBLE, BUT PREFERABLY WITHIN 2 WORKING DAYS OF YOUR RECEIPT OF THIS NOTICE OR 5 DAYS PRIOR TO THE MEETING OR HEARING DATE. IF YOU ARE HEARING OR VOICE IMPAIRED, CONTACT THE RELAY OPERATOR AT 7-1-1 or 1-800-955-8771.

UPON REQUEST BY A QUALIFIED INDIVIDUAL WITH A DISABILITY, THIS DOCUMENT WILL BE MADE AVAILABLE IN AN ALTERNATE FORMAT. IF YOU NEED TO REQUEST THIS DOCUMENT IN AN ALTERNATE FORMAT, PLEASE CONTACT THE CITY CLERK WHOSE CONTACT INFORMATION IS PROVIDED ABOVE.

ANY INVOCATION THAT IS OFFERED BEFORE THE OFFICIAL START OF THE CITY COUNCIL MEETING SHALL BE THE VOLUNTARY OFFERING OF A PRIVATE PERSON, TO AND FOR THE BENEFIT OF THE CITY COUNCIL. THE VIEWS OR BELIEFS EXPRESSED BY THE INVOCATION SPEAKER HAVE NOT BEEN PREVIOUSLY REVIEWED OR APPROVED BY THE CITY COUNCIL OR THE CITY STAFF, AND THE CITY IS NOT ALLOWED BY LAW TO ENDORSE THE RELIGIOUS BELIEFS OR VIEWS OF THIS, OR ANY OTHER SPEAKER. PERSONS IN ATTENDANCE AT THE CITY COUNCIL MEETING ARE INVITED TO STAND DURING THE OPENING INVOCATION AND PLEDGE OF ALLEGIANCE. HOWEVER, SUCH INVITATION SHALL NOT BE CONSTRUED AS A DEMAND, ORDER, OR ANY OTHER TYPE OF COMMAND. NO PERSON IN ATTENDANCE AT THE MEETING SHALL BE REQUIRED TO PARTICIPATE IN ANY OPENING INVOCATION THAT IS OFFERED. A PERSON MAY EXIT THE CITY COUNCIL CHAMBERS AND RETURN UPON COMPLETION OF THE OPENING INVOCATION IF A PERSON DOES NOT WISH TO PARTICIPATE IN OR WITNESS THE OPENING INVOCATION.



CITY COUNCIL AGENDA ITEM

REQUESTED COUNCIL MEETING DATE 12/22/2020

Consent item: No

SUBJECT: (B4) Resolution No. 20-75 - Calling for a Primary and Special Election to elect a Council Member for District 1 and providing for qualifying dates

DEPARTMENT: City Clerk

GOAL:

RECOMMENDED MOTION: Move to approve Resolution No. 20-75 calling a special election to elect a Council Member for District 1, and providing for election dates and the qualifying period.

SUMMARY: Dr. Ford's resignation has created a vacancy in the Council Seat for District 1 effective December 18, 2020. Pursuant to Charter Section 3.05(c), the City Council is required to call a special election of the voters to fill the vacancy.

Qualifying period will be February 1 through February 5, 2021.
Should more than one (1) candidate qualify, the Election date is set for April 13, 2021.
Run off election date, if needed, will be June 22, 2021.

Project No.: Funding Account No.:

Presenter:

ATTACHMENTS:

1.	Reso. No. 20-75	Reso. No. 20-75.pdf
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Robin Fenwick
Matthew Jones
Alan Rosen
Robin Fenwick

Created/Initiated - 12/16/2020
Approved - 12/17/2020
Approved - 12/17/2020
Final Approval - 12/17/2020

RESOLUTION NO. 20-75

A RESOLUTION OF THE CITY COUNCIL OF THE CITY OF PORT ORANGE, VOLUSIA COUNTY, FLORIDA CALLING A PRIMARY ELECTION AND A SPECIAL ELECTION, AS NEEDED, FOR THE PURPOSE OF ELECTING THE CITY COUNCIL MEMBER FOR DISTRICT 1; PROVIDING FOR THE QUALIFYING PERIOD AND ELECTION DATES; AUTHORIZING THE CITY CLERK TO PROCEED WITH ALL ELECTION ARRANGEMENTS; AND PROVIDING AN EFFECTIVE DATE.

WHEREAS, the District 1 City Council seat is now vacant due to the resignation of Councilmember Marilyn Ford effective December 18, 2020; and

WHEREAS, the Charter Section 3.05(c) of the City of Port Orange, Florida, provides that a special election and a primary election, as needed, shall be held to fill a vacancy on City Council; and

WHEREAS, the City Council desires to establish the special and primary election dates and the qualifying dates for the voters to elect the councilmember for District 1; and

WHEREAS, Charter Section 5.02 and 5.05(b) provides that any person who resides in District 1, has been a resident of the City of Port Orange for at least 12 months, and is a registered voter (of Volusia County) may become a candidate for nomination to the office of city council member whenever the candidate files a petition signed by fifty (50) qualified electors of the city with the city clerk, requesting that said candidate's name be placed on the ballot in the ensuing elections for councilmember in District 1. Said candidate shall file such papers and pay such fees as may be required by law with the city clerk during normal business hours during the qualifying period; and

WHEREAS, all City of Port Orange registered voters shall be eligible to elect a council member at-large for District 1.

WHEREAS, the city has given notice to the Supervisor of Elections, who has approved the primary and special election dates as set forth hereinafter.

NOW, THEREFORE, BE IT RESOLVED BY THE CITY COUNCIL OF THE CITY OF PORT ORANGE, FLORIDA, as follows:

Section 1. The City Council of the City of Port Orange hereby calls a Primary Election to be held Tuesday, April 13, 2021.

Section 2. The City Council of the City of Port Orange hereby calls a Special Election to be held on Tuesday, June 22, 2021.

Section 3. The qualifying period of the above described primary and special elections for the City of Port Orange are hereby ratified and shall begin on Monday, February 1, 2021 at 12:00 noon. The final time of qualifying shall be Friday, February 5, 2021 at 12:00 noon. No petitions to qualify will be accepted by the City Clerk after that date and time.

Section 4. In the event not more than one person qualifies as a candidate for a designated seat on the City Council to be filled at an election, that seat shall not be listed on the primary or special election ballot. Each unopposed candidate shall be deemed to have voted for himself/herself.

Section 5. The City Clerk is authorized and directed to proceed with all election arrangements required for the above-described elections in accordance with the Charter of the City of Port Orange and applicable law.

Section 6. This resolution shall become effective immediately upon adoption.

MAYOR DONALD O. BURNETTE

ATTEST:

Robin L. Fenwick, CMC, City Clerk

Adopted on the day of

Reviewed and Approved: _____
Matthew J. Jones, City Attorney



CITY COUNCIL AGENDA ITEM

REQUESTED COUNCIL MEETING DATE 12/22/2020

Consent item: No

SUBJECT: (B5) Interviews and Selection for RFP #21-05 - Executive Search Firms for City Manager Recruitment

DEPARTMENT: Administrative Services

GOAL:

RECOMMENDED MOTION: Move to approve the Executive Search Firm selected by Council to perform the City Manager Executive Search; authorizing the Mayor and City Clerk to execute all contract documents.

SUMMARY: On December 10th the City received 6 proposals for Executive Search Services, RFQ #21-05. After review of the proposals, City Council deliberated and approved a shortlist of proposers on December 15th to provide oral presentations to the evaluation committee. They are scheduled for 5:30 PM on Dec 22nd when a final selection will be made. The three short-listed firms are: Baker Tilly, Colin Baenziger and Associates and The Mercer Group, Inc.

Project No.: Funding Account No.:

Presenter: Jamie Miller, James Tillman

ATTACHMENTS:

Robin Fenwick	Created/Initiated - 12/16/2020
James Tillman	Approved - 12/17/2020
Jamie Miller	Approved - 12/17/2020
Matthew Jones	Approved - 12/18/2020
Alan Rosen	Approved - 12/18/2020
Robin Fenwick	Final Approval - 12/18/2020



**PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES
FOR CITY MANAGER FOR PORT ORANGE, FL**

Volume II: Appendices

RFP #21-05 Executive Search Services

Colin Baenziger & Associates

Project Manager and Contact Person:

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

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PROPOSAL TO BE THE CITY'S EXECUTIVE RECRUITING FIRM

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Appendix A

*Searches by
Colin Baenziger & Associate' Staff*

Governmental Search Assignments

Current Searches

Town Manager, Lady Lake, FL (Population 15,954)

City Attorney, Naples, FL (Population 22,367)

Planning and Community Development Director, Bradenton, FL (Population 60,888)

Executive Director, Cape Fear Utility Authority, Wilmington, NC

Searches Completed in 2020

Town Manager, Bay Harbor Islands, FL (population 5,628)

City Manager, Brighton, CO (population 41,254)

City Manager, Cape Coral, FL (population 194,570)

City Manager, Crescent City, FL (population 1,542)

City Manager, Doraville, GA (population 10,526)

City Manager, Montverde, FL (population 1,675)

City Manager, Port Richey, FL (2,869)

City Manager, Winchester, VA (population 28,108)

Chief Administrative Officer, Renton, WA (population 100,953)

City Attorney, Lawton, OK (population 94,653)

Finance Director, Gainesville, FL (population 133,857)

Public Works Administrator, Renton, WA (population 100,953)

Customer Service Chief, Sewer & Water Board of New Orleans, LA

Executive Director, Emerald Coast Utilities Authority, Pensacola, FL

General Manager, Des Moines (IA) Water Works (serves a population of over 500,000)

Governmental Search Assignments (continued)

Completed Searches Prior to 2020

City/Town/Village Manager/Administrator

City Manager, Albany, GA (population 75,600) in 2011
City Manager, Ankeny, IA (population 45,600) in 2013
City Manager, Ashland, KY (population 21,000) in 2013
City Manager, Auburn, AL (population 58,582) in 2017
City Manager, Aventura, FL (population 37,724) in 2017 and 2018
Village Manager, Bal Harbour, FL (population 3,300) in 2013
City Manager, Bartow, FL (population 16,000) in 2007 in 2017
Town Manager, Bay Harbor Islands, FL (population 5,200) in 2003 and 2007
City Manager, Bellevue, WA (population 122,400) in 2014
Town Manager, Buckeye, AZ (population 32,000) in 2006
City Manager, Burien, WA (population 55,188) in 2017
City Manager, Cape Canaveral, FL (population 10,200) in 2010
City Manager, Cape Coral, FL (population 154,300) in 2012
City Manager, Carnation, WA (population 1,873) in 2017
City Manager, Casselberry, FL (population 25,000), in 2005
City Manager, Chamblee, GA (population 17,000) in 2011
City Manager, Clewiston, FL (population 7,270) in 2019
City Manager, Cocoa Beach, FL (population 11,200) in 2012, 2015 and 2016
City Administrator, Connell, WA (population 4,200) in 2014
City Manager, Cooper City, FL (population 32,000) in 2008
City Manager, Coral Gables, FL (population 43,000) in 2009
City Manager, Cottonwood Heights, UT (population 34,000) in 2004
City Manager, Covington, VA (population 5,802) in 2016
Town Manager, Cutler Bay, FL (population 35,000) in 2006
City Manager, Dania Beach, FL (population 28,000) in 2009
City Manager, Danville, VA (population 43,000) in 2016
City Manager, Deerfield Beach, FL (population 78,000) in 2019
City Manager, Delray Beach, FL (population 64,100) in 2014
City Manager, Deltona, FL (population 83,000) in 2006 and 2008
City Manager, Destin, FL (population 12,000) in 2003 and 2011
City Administrator, Dickinson, ND (population 22,300) in 2018
City Manager, Doral, FL (population 24,000), in 2004
City Manager, Doraville, GA (population 10,896) in 2013 and 2017
Town Manager, Dundee, FL (population 3,000) in 2006 and 2009
City Manager, Ellensburg, WA (population 18,350) in 2014
City Manager, Elmira, NY (population 29,200) in 2014
Village Manager, Estero, FL (population 26,600) in 2015
City Manager, Fairborn, OH (population 33,200) in 2017
City Manager, Fayetteville, NC (population 208,000) in 2012
City Manager, Fernandina Beach, FL (population 11,000) in 2006 and 2015
City Manager, Fife, WA (population 8,700) in 2010 in 2017

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, Fort Myers, FL (population 68,190) in 2016
Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008
City Manager, Fort Pierce, FL (population 41,900) in 2012
City Manager, Fort Smith, AR (population 87,650) in 2016
City Manager, Fruitland Park, FL (population 4,100) in 2013
Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1999 and 2005
City Manager, Gainesville, FL (population 133,857) in 2016 and 2019
City Manager, Greensboro, NC (population 259,000) in 2009
City Manager, Groveland, FL (population 12,493) in 2018
City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012
City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)
City Manager, Homestead, FL (population 62,000) in 2010
City Manager, Indianola, IA (population 15,108) in 2015
City Manager, Jacksonville Beach, FL (population 23,387) in 2018
Town Manager, Juno Beach, FL (population 3,600) in 2005
Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011
City Manager, Key West, FL (population 24,600) in 2012
Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003
Town Manager, Lantana, FL (population 9,600) in 2000
City Administrator, Lake Forest Park, WA (population 13,059) in 2018
City Manager, Lake Worth, FL (population 37,000) in 2003 and 2007
City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002
City Manager, Leesburg, FL (population 20,390) in 2013
City Manager, Madeira Beach, FL (population 12,300) in 2011
Town Manager, Mangonia Park, FL (population 1,400) in 2001
City Manager, Marathon, FL (population 11,500 in 2002 and 2004
City Manager, Marco Island, FL (population 15,000) in 2014
City Manager, Medina, WA (population 3,000) in 2013
City Manager, Melbourne, FL (population 72,500) in 2012
City Manager, Miami Gardens, FL (population 101,000) in 2004
City Manager, Mill Creek, WA (18,828) in 2015
City Manager, Miramar, FL (population 122,000) in 2013
City Manager, Monroe, NC (population 33,500) in 2013
Town Manager, Mooresville, NC (population 41,995) in 2019
City Manager, Mount Dora, FL (population 12,000) in 2005
City Manager, Mount Pleasant, MI (population 26,000) in 2014
City Manager, Mountlake Terrace, WA (population 20,700) in 2014 and 2016
City Manager, Naples, FL (population 21,800) in 2018
City Manager, New Smyrna Beach, FL (population 23,000) in 2009
City Manager, Normandy Park, WA (population 6,335) in 2013 and 2015
City Manager, North Miami, FL (population 62,000) in 2010 and 2014
Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012
City Manager, North Port, FL (population 55,800) in 2011

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

Town Manager, North Topsail Beach, NC (population 734) in 2018
City Manager, Norwich, CT (population 40,500) in 2016
City Manager, Oakland Park, FL (population 42,800) in 2014
City Manager, Ocala, FL (population 52,000) in 2008 and 2015
City Manager, Opa-Locka, FL (population 2,180) in 2019
City Manager, Orange City, FL (population 10,000) in 2010 and 2016
City Manager, Orange Park, FL (population 9,100) in 2010
City Manager, Oviedo, FL (population 33,000) in 2008
City Manager, Palm Bay, FL (current population 101,000) in 2002 and 2015
City Manager, Palm Coast, FL (population 71,000) in 2006
Village Manager, Palmetto Bay, FL (population 24,000) in 2003
City Manager, Panama City Beach, FL (population 12,776) in 2012 and 2019
City Manager, Parkland, FL (population 30,177) in 2017
City Manager, Petersburg, VA (population 32,701) in 2017
Village Manager, Pinecrest, FL (population 19,300) in 2011
City Manager, Pompano Beach, FL (population 101,000) in 2007
City Manager, Port St. Lucie, FL (population 174,100) in 2016
City Manager, Portland, ME (population 65,000) in 2011
City Manager, Prosser, WA (population 5,802) in 2016
City Manager, Riviera Beach, FL (population 37,000) in 2009
City Manager, Roanoke, VA (population 98,465) in 2009 and 2017
City Manager, Sammamish, WA (population 64,548) in 2019
City Manager, Sarasota, FL (population 55,000) in 2012
City Manager, Satellite Beach, FL (population 10,100) in 2013
City Manager, Savannah, GA (population 142,800) in 2016
City Manager, Scottsdale, AZ (population 217,400) in 2013
City Manager, Sebastian, FL (population 24,772) in 2018
City Manager, Seminole, FL (population 17,800) in 2015
City Manager, Sequim, WA (population 6,700) in 2015
Town Manager, Sewall's Point, FL (population 2,000) in 2006
Township Manager, Spring Garden Township, PA (population 12,963) in 2018
Township Manager, Springettsbury Township, PA (population 26,700) in 2014 and 2016
City Manager, St. Pete Beach, FL (population 10,000) in 2014 and 2019
City Manager, Stuart, FL (population 17,000) in 2006 and 2017
City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011
City Manager, Sunrise, FL (population 84,400) in 2012
City Manager, Sunnyside, WA (population 15,860) in 2013 and 2018
Town Manager, Surfside, FL (population 6,000) in 2014
City Manager, Tacoma, WA (population 200,000) in 2011 and 2017
City Administrator, Tavares, FL (population 11,000) in 2006
City Manager, Titusville, FL (population 43,940) in 2014
City Manager, Treasure Island, FL (population 6,937) in 2017
City Manager, Vero Beach, FL (population 16,751) in 2019

Governmental Search Assignments (continued)

City/Town/Village Manager/Administrator (continued)

City Manager, West Melbourne, FL (population 15,000) in 2009
City Manager, West Park, FL (population 12,000) in 2005 and 2010
City Manager, Weston, FL (population 70,015) in 2019
City Manager, Winchester, VA (population 26,000) in 2014
City Manager, Winter Haven, FL (population 37,900) in 2017
City Manager, Yakima, WA (population 91,000) in 2011 and 2012

County Administrator / Manager - Completed Searches

County Manager, Alachua County, FL (population 251,400) in 2014
County Manager, Baker County, FL (population 27,000) in 2006
County Administrator, Bay County, FL (population 158,000) in 2005
County Manager, Brevard County, FL (population 536,000) in 2009
County Administrator, Broward County, FL (population 1,800,000) in 2006
County Administrator, Clackamas County, OR (population 383,900) in 2013
County Manager, Clay County, FL (population 212,230) in 2005, 2011 and 2019
Chief Administrator, El Paso County, TX (population 827,700) in 2014 and 2016
County Administrator, Emmet County, MI (population 32,900) in 2014
County Manager, Flagler County, FL (population 83,000) in 2007
County Manager, Fulton County, GA, (partial search) in 2015 (population 894,300) in 2015
County Administrator, Hernando County, FL (population 172,800) in 2012
County Administrator, Highlands County, FL (population 98,000) in 2008
County Administrator, James City County, VA (population 69,000) in 2014
County Manager, Lee County, FL (population 600,000) in 2009
County Administrator, Martin County, FL (population 140,000) in 2005
Borough Manager, Matanuska-Susitna Borough, AK (population 85,000) in 2011
County Administrator, Monroe County, FL (population 80,000) in 2004
County Administrator, Nassau County, FL (population 60,000) in 2004
County Administrator, Okaloosa County, FL (population 183,500) in 2013
County Administrator, Okeechobee County, FL (population 39,000) in 2008
County Manager, Osceola County, FL (population 235,000) in 2003 and 2007
County Administrator, Polk County, IA (population 400,000) in 2007 and 2011
County Manager, Seminole County, FL (population 410,000) in 2006
County Administrator, St. Johns County, FL (population 162,000) in 2007
County Administrator, St. Lucie County, FL (population 284,000) in 2014
County Manager, Union County, NC (population 198,600) in 2010
County Administrator, York County, VA (population 66,269) in 2015

Completed Searches – Other Municipal CEO

Executive Director, Bartow Municipal Airport Development Authority, Bartow, FL in 2017
Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900)
in 2016

Governmental Search Assignments (continued)

Completed Searches – Other Municipal CEO (continued)

General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007
General Manager, Island Water Association, Sanibel, FL in 2018
Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003
Executive Director, South Correctional Entity (SCORE), Des Moines, WA (population served 406,000) in 2018

Community Association CEOs and Assistant CEOs

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

Completed Searches – Assistant/Deputy Managers

Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013
Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014
Deputy City Manager, Danville, VA (43,000) in 2016
Deputy City Administrator, Dickinson, ND (population 22,300) in 2016
Deputy City Manager for Community Building, Durham, NC (population 220,000) in 2009
Assistant Town Manager, Jupiter Island, FL (population 654) in 2010
Assistant Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1998
Assistant City Manager, Lake Worth, FL (population 37,000) in 2004
Assistant County Administrator, Martin County, FL (population 140,000) in 2006
Deputy City Manager, Sammamish, WA (60,000) in 2016
Assistant City Manager, Tamarac, FL (population 55,500) in 2001
Assistant City Manager, West Palm Beach, FL (population 101,000) in 2004 and 2013

Completed Searches – City or County Attorneys

County Attorney, Clay County, FL (population 196,400) in 2016
City Attorney, Daytona Beach, FL (62,300) in 2016
City Attorney, Fort Lauderdale, FL (population 178,752) in 2018

Governmental Search Assignments (continued)

Completed Searches – City or County Attorneys (continued)

City Attorney, Fort Pierce, FL (population 41,590) in 2016 and 2018
County Attorney, Fulton County, GA (population 996,319) in 2015
Chief Labor Negotiator, Orlando, FL (population 270,934) in 2018
City Attorney, Port St. Lucie, FL (population 185,132) in 2016 and 2019
County Attorney, Prince William County, VA (population 438,580) in 2015
City Attorney, Roanoke, VA (population 96,000) in 2012
Fire District Attorney, St. Lucie County Fire District, FL (population 298,600) in 2017
City Attorney, Vero Beach, FL (population 16,751) in 2019
City Attorney, West Melbourne, FL (population 15,000) in 2008

Completed Searches – Community Development/Growth Management/Planning

Growth Management Director, Collier County, FL (population 357,305) in 2015 and 2017
Community Development Director, Danville, VA (population 43,000) in 2016
Director, Building and Development, Loudoun County, VA (population 336,900) in 2014
Community Development Director, Miami, FL (population 408,000) in 2008
Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012
General Manager, North Sarasota Redevelopment District, Sarasota, FL (population 53,000) in 2008
Growth Management Director, St. Lucie County, FL (population 261,000) in 2005
Community Development Director, Tamarac, FL (population 55,500) in 2007
Growth Management Manager, Wellington, FL (population 55,000) in 2009

Completed Searches – Economic Development / Redevelopment

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

Completed Searches – Engineers

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

Governmental Search Assignments (continued)

Completed Searches – Facilities Management

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

Completed Searches – Finance and Budget

Finance Director, Altus, OK (population 19,800) (background check) in 2012
Finance Director, College Park, MD (population 32,256) in 2016
Procurement Director, Collier County, FL (population 357,305) in 2016
Finance Director, Danville, VA (population 43,000) in 2014
Finance Director, Daytona Beach, FL (population 31,860) in 2012
Finance Director, DeLand, FL (population 28,230) in 2016
Finance Director, Escambia County (FL) Housing Authority (population served: 302,700), 2014
Finance Director, Fort Walton Beach, FL (population 20,000) in 2006
Finance Director, Groveland, FL (population 12,493) in 2018
Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012
Manager, Office of Management and Budget, Lake Worth, FL (population 37,000) in 2010
Finance Director, Lauderdale Lakes, FL (population 32,000) in 1998
Finance Director, Miami, FL (population 408,000) in 2013
Finance Director, Miramar, FL (population 130,300) in 2016
Treasurer, Miami, FL (population 408,000) in 2013
Finance Director, Oregon City, OR (population 31,860) in 2012
Finance Director, Petersburg, VA (population 32,701) in 2017
Finance Director, Roanoke, VA (population 99,000) in 2014
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014
Revenue Operations Director, Savannah, GA (population 142,800) in 2017
Budget Director, St. Petersburg, FL (population 248,000) in 2009
Finance Director, St. Petersburg, FL (population 248,000) in 2010
Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010
Finance Director, Surfside, FL (population 5,700) in 2012
Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009
Finance Director, West Palm Beach, FL (population 101,000) in 2007

Completed Searches – Fire/EMS/Dispatch

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

Completed Searches – General Services / Administration

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

Governmental Search Assignments (continued)

Completed Searches – Housing/Building

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

Completed Searches – Human Resources

Human Resources Director, Boca Raton, FL (population 84,000) in 2006
Human Resources Director, Cape Coral, FL (population 154,300) in 2013
Director, Human Resources, Gainesville, FL (population 125,000) in 2014
Director of Personnel, Fulton County, GA (population 992,000) in 2010
Director, Human Resources, Hillsborough County, FL (population 1,292,000) in 2015
Human Resources Office, Loudoun County, VA (population 326,000) in 2011
Human Resources Administrator, Martin County, FL (population 140,000) in 2007
Personnel Director, North Miami, FL (population 56,000) in 2001
Director, Human Resources, Sunrise, FL (population 88,800) in 2015
Director, Human Resources, Roanoke, VA (population 99,000) in 2014
Personnel Director, Vero Beach, FL (population 17,900) in 2003
Human Resources Director, West Palm Beach, FL (101,900) in 2013 and 2014

Completed Searches – Health and Human Services

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

Completed Searches – Information Technology

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

Completed Searches – Parks/Recreation/Libraries

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

Governmental Search Assignments (continued)

Completed Searches – Police

Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)
Police Chief, Farmington, NM (population 45,900) in 2014
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)
Chief of Police, Mooresville, NC (population 35,300) in 2016
Police Chief, Petersburg, VA (population 32,701) in 2017
Director of Administration – Public Safety, Ocean Reef Community Association, Key Largo, FL in 2016
Police Chief, Sewall's Point, FL (population 2,000) in 2007
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012
Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010
Police Chief, Winchester, VA (population 27,216) in 2017

Completed Searches – Public Works

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

Completed Searches – Transportation

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

Governmental Search Assignments (continued)

Completed Searches – Utilities

Water Resources Director, Asheville, NC (population 87,200) in 2015
Utility Director, Danville, VA (population 43,000) in 2015
Power & Light Division Director, Danville, VA (population 43,000) in 2015
Water and Gas Director, Danville, VA (population 43,000) in 2016
Utilities Manager, Deerfield Beach, FL (population 78,041) in 2017
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003
Utilities Director, Lake Worth, FL (population 37,000) in 2009
Waterworks Director, Newport News, VA (population 183,000) in 2017
Executive Director, Onslow Water & Sewer Authority, Jacksonville, NC, (pop. 160,000) in 2009
Utilities Director, Palm Bay, FL (population 101,000) in 2005
Utilities Director, Panama City, FL (population 38,286) in 2017
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012
Executive Director, Sewerage and Water Board of New Orleans, LA (population 369,000)
Director, South Martin Regional Utilities, FL (population 22,000) in 2013
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008
General Manager, Tampa Bay Water, FL (population served 2,400,000) in 2008

Completed Searches – Work Force Management

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

Completed Searches – Other

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016
City Clerk, Lauderdale Lakes, FL (population 32,000) in 1998
Clerk to the County Commission, Fulton County, GA (population 1.02 million) in 2018
Director, Registrations and Elections, Fulton County, GA (population 992,000) in 2009
Environmental Resources Director, St. Lucie County, FL (population 261,000) in 2009
Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV (population 14,000) in 2015 and 2017
Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998
Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017

Appendix B

Sample Brochure: City Manager Search Port St. Lucie, FL



— POSITION AVAILABLE —

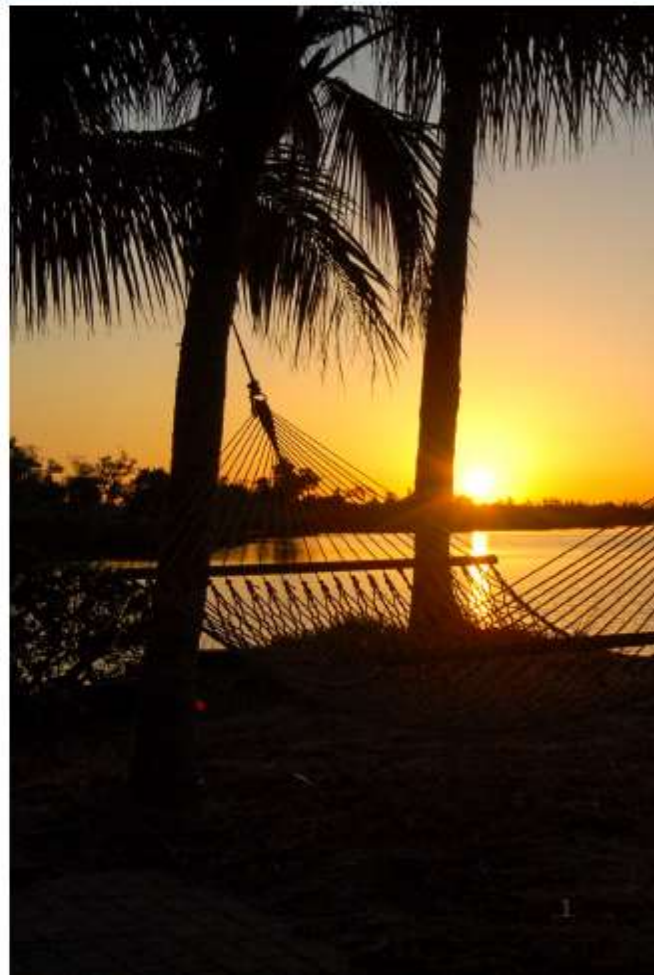
CITY MANAGER POSITION

Apply by March 31, 2020

Welcome to Cape Coral, Florida

Cape Coral is Lee County's peninsular city, lying along Florida's Gulf Coast between the scenic Caloosahatchee River, Charlotte Harbor, and the Intracoastal Waterway. Known as a "Waterfront Wonderland," it is a safe city with a wonderful climate, plentiful recreational activities, warm and friendly residents, and an excellent educational system. It is the largest city between Tampa and Miami with a population of almost 200,000 and 120 square miles. It is a rapidly growing city in a rapidly growing area. In October 2019 WalletHub ranked it 9th among cities which were growing fastest economically. Two of its neighbors, Lehigh Acres and Fort Myers were ranked 1st and 6th. Now, with its current city manager retiring soon, Cape Coral is seeking an outstanding, forward thinking, results oriented city manager, to continue the path toward a more prosperous future.

Cape Coral has many attractions for residents and tourists alike. Featuring 265 days of sunshine annually, you can enjoy the water year-round. The City's 400 miles of canals (some nearly 200 feet in width) are open to boating and fishing. Many connect to the Gulf of Mexico. Fishing from a public pier is an option and the city offers a public beach on the Caloosahatchee River. The city has more than 30 recreational parks. An example is SunSplash Family Waterpark,



a 14-acre venue filled with slides, pools, and fun. With internationally recognized beaches in nearby Sanibel Island and Fort Myers Beach, water activities abound.

For those interested in golf, museums, music, plays, sports, and travel, you will find ample opportunities. The Historical Museum, Art Studio, Southwest Florida Military Museum, Cape Coral Art League, and the Cultural Park Theater all host year-round events. In nearby Fort Myers, the Barbara B. Mann Performing Arts Hall is home to the Southwest Florida Symphony. The Cape Coral Festival of the Arts takes place in mid-January drawing around 300 artists and craftspeople, and over 100,000 visitors. Seven golf courses are situated within Cape Coral boundaries; 19 more lie within a 10-mile drive of the city's center. MLB's Red Sox and Twins make Fort Myers their spring training home and minor league baseball starts soon afterwards. If that is not enough, nearby are two of Florida's cultural capitals: Naples (35 miles south) and Sarasota (85 miles north).

Entertainment in Cape Coral is found at Coralwood, Cape Harbour, or the Shops at Surfside. These trendy shopping destinations include anchor stores, art galleries, boutiques, restaurants, and a cinema. Downtown Cape Coral has an array of stores, shops, restaurants, museums, and a weekly farmer's market which is both a center of community and mouthwatering goods.

Those who love nature will find wonderful local ecological preserves and parks where wildlife abounds, including the largest population of burrowing owls in the state. Elevated nature trails take visitors through the mangroves at Four Mile Cove Ecological Preserve, and kayaks are available to explore it. Manatees, some of Florida's beloved wildlife, can be spotted at Sirenia Vista Park. Once again, much more is within a few hours' drive including Florida Everglades National Park, Big Cypress National Preserve, and Fakahatchee Strand State Preserve.

Cape Coral is a very affordable place to live. The median home value is \$243,000, which is lower than many surrounding cities, and many cities in Florida. The city is a popular place for second homes. Cape Coral is consistently ranked #1 or #2 in terms of safety for cities its size in Florida. Elementary and secondary education is excellent here. Lee County School District offers nine elementary schools, six middle schools, and five high

schools. All are high performing as is the Cape Coral Charter School System which includes two elementary schools, a middle school, and a high school.

For higher education, the main campus of Florida SouthWestern State College is located immediately east of the city, and the Florida Gulf Coast University has a satellite facility in Cape Coral. Other nearby universities and colleges include Hodges University, Southwest Florida College, and Rasmussen College.

Cape Coral is 14 miles from the Southwest Florida International Airport, which serves nearly eight million passengers annually and makes travel easy and accessible. Many additional airports are located in Sarasota, Tampa, West Palm Beach, Fort Lauderdale, and Miami. Cruises are readily available to the Caribbean, Mexico, and Central America from the Port of Miami, Port Everglades (in Fort Lauderdale) and Port Tampa (the 1st, 3rd and 29th busiest cruise ports in the world by passenger volume). All are within a three-hour drive, as is Walt Disney World.

What makes Cape Coral truly different from other cities of similar size is that it retains a sense of community. Residents care about their neighbors and when they need help, they pitch in. It is a great place to raise a family. This picturesque waterfront paradise has much to offer. Known for its history of growth, Cape Coral is full of potential, and we encourage forward-thinking managers to join us on the water.

History

Prior to the arrival of European and American settlers, the area that would become Cape Coral was frequented by Calusa Indians. Until the 1950s, aside from an uninhabited hunting camp, the only prominent features were pine trees and grazing cattle.

In 1957, Leonard and Jack Rosen, owners of Gulf American Corporation purchased 103 square miles of land for \$678,000 and began planning their "waterfront wonderland". It was one of the first master planned communities (and the largest) in the United States, with over 135,000 platted lots. The program was so successful that offices soon opened in 24 states, and airline arrangements allowed buyers to take charter flights to their Florida properties.

Table 1: Principal Employers, Cape Coral, FL

Employer	Industry	Employees
Lee County School District	Education	2,452
Lee Memorial Health System	Medical	2,235
City of Cape Coral	Municipal	1,369
Publix Super Market	Retail	1,270
Sam's/Walmart	Retail	887
Home Depot	Retail	570
Regional VA Clinic	Medical	554
Gulf Coast Village	Healthcare	430
Target	Retail	368
Cape Coral Charter School	Education	344

Source: City of Cape Coral, FL 2018 CAFR

In the first five months, the Rosens sold over \$5 million worth of land, and ground was broken for the first home. The idea was to sell lots to retirees and build the amenities later. By 1963, the population exceeded 2,800. By 1970, it exceeded 10,000 and it kept climbing. The Cape Coral Bridge (that crossed the Caloosahatchee River) opened in 1964 and made it much easier to reach the city.

Cape Coral was incorporated as a city in 1970 and was the second largest land mass in the state of Florida. The growth has not stopped, and the population is over 194,000 with a build out of approximately 400,000. Last year, the city issued over 2,000 building permits and it has issued over 300 in the first two months of this year. Needless to say, Cape Coral is full of potential. Largely residential, it is focusing now on economic development that will encourage commercial construction and business expansions to provide more opportunities for its residents in this waterfront paradise.

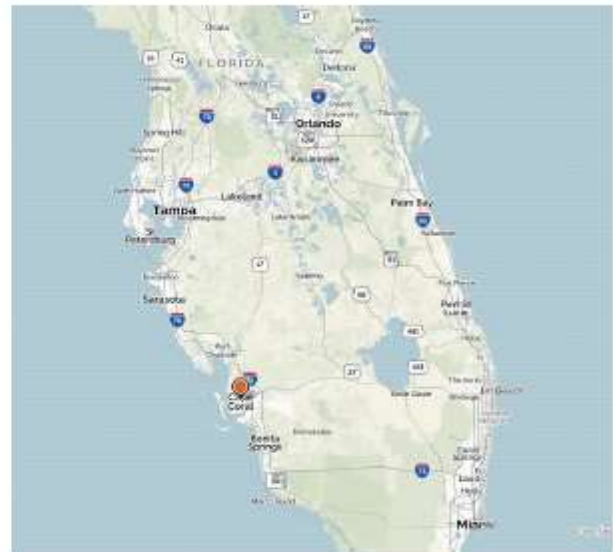
Commerce

Healthcare services, retail, real estate, and construction are the mainstays of Cape Coral's economy. The city's Economic Development Office has done much to encourage economic growth, including incentives for businesses to relocate to Cape Coral.

Geography

Cape Coral lies on Florida's Gulf Coast 130 miles south of Tampa. It is flat, approximately 5 feet above sea level, and just inland from the Gulf Coast. Located on a large peninsula, Cape Coral covers approximately 120 square miles, of which 110 miles is land and 10 is water. Caloosahatchee River borders it on the south and east, while Matlacha Pass borders the west. The city has over 400 miles of canals, most of which are navigable. Two hours to the north lies Tampa, three hours southeast

lies Miami and almost four hours northeast is Orlando. See the map below for Cape Coral's relationship with other prominent Florida cities.



Climate

Cape Coral has a tropical savanna climate with warm and humid summers and temperate winters. The average summer high is 92°F with the average low being 74°F. In the winter, the average high temperature is 76°F and the low is 56°F. The rainy

season lasts from June to September, featuring heavy but brief afternoon rains. Overall, Cape Coral receives about 53 inches of rain per year.

Demographics

Table 2: Cape Coral Demographics

Estimated Population: 194,570			
Distribution by Race		Distribution by Age	
White	90.0%	0 to 15	16.1%
Black	4.4%	15 to 25	10.5%
Asian	1.6%	25 to 45	21.9%
Native American	0.3%	45 to 65	29.6%
Two or More Races	3.7%	65 to 85	18.9%
Total	100%	Over 85	3.0%
Hispanic Ethnicity (all races)	20.2%		

Educational Achievement (Over Age 25)	
High School or Higher	91.0%
Bachelor's Degree or Higher	22.5%

Educational Achievement (Over Age 25)	
Median Age—Cape Coral	45.9
Median Age—U.S.	37.8
Median Household Income	\$53,653
Poverty Rate	12.7%

Source: U.S. Census Bureau

The Government

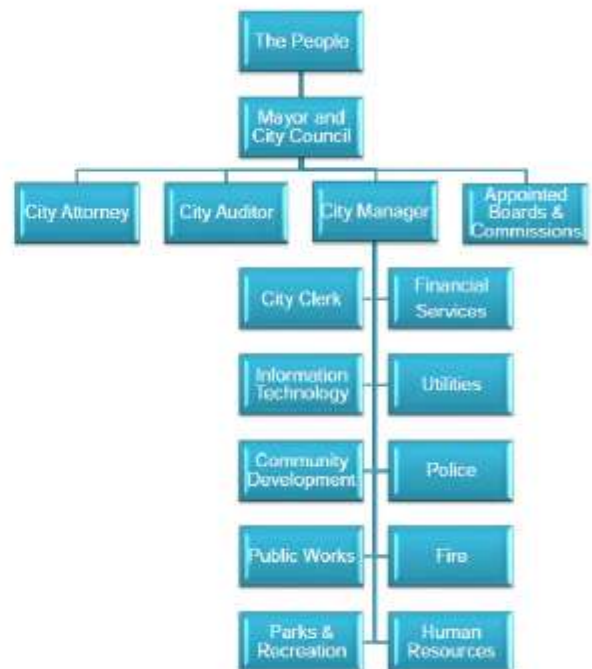
Cape Coral is a forward thinking and progressive government. Its mission statement reads, "The City of Cape Coral will provide its citizens with services in the most efficient and effective manner possible, while maintaining a positive safe and caring community with a united spirit," and it has been largely successful. In terms of technology, the Center for Digital Government has ranked it either 1st or 2nd in the country the last three years for cities with populations between 125,000 and

250,000 in terms of technology. In 2019, IDG announced Cape Coral as one of its FutureEdge 50 Winners (which includes businesses and governments) for pushing the boundaries of new technologies for better business success.

The City of Cape Coral is governed by a City Council composed of a Mayor and seven members. All are elected at large, but the council members must reside in the district they represent. They serve staggered four-year terms and are limited to two consecutive terms. The Mayor and Council appoint the City Manager, City Attorney, and City Auditor.

The City Manager carries out City Council policy and supervises the day-to-day operations of the city government. In particular, he/she directly or indirectly oversees: code enforcement, fire/rescue, planning, building and zoning, parks and recreation, police, public works, transportation, utilities (water, wastewater and storm water) along with finance, human resources, and information technology. See Chart 1 below. Notably, the city also manages a yacht club basin, golf course, and water park while participating in the Cape Coral Charter School Authority. Overall, Cape Coral has 1,433 full-time equivalent positions, and 390 contractual equivalent employees (almost all of which are parks and recreation employees). The

Chart 1: City of Cape Coral Governmental Structure



staff is competent and committed to providing high quality services to the community's residents and businesses. See Chart 1 for the City of Cape Coral's Government Structure

The city produces a three year budget—the first year is the budget for the current period. The second and third years are projections that allow the elected officials, staff and the public to envision the impact of their immediate decisions. These projections are adjusted and locked in just before the start of the relevant fiscal year. The 2020 budget for all funds is \$895.2 million. The general fund budget is \$233.3 million. The Cape Coral Charter School Authority accounts for \$36.0 million of the total budget. The millage rate has been gradually reduced from 7.96 mills in 2012 to 6.55 in the 2020 budget.

Three unions represent city employees. The International Union of Painters and Tradesmen (IUPAT) represents white- and blue-collar employees, the International Firefighters Association (IFFA) represents the city's firefighters, and the Fraternal Order of Police (FOP) represents police employees.

The Challenges and Opportunities

Cape Coral has been well-run, is financially sound and has excellent bond ratings. It is not, however, without challenges and opportunities. First and foremost is growth. People are coming, and the city is largely supportive. The concern is they are coming very quickly and straining the existing resources. Further, infrastructure is not always present. While the Gulf American Corporation sold many lots and built some infrastructure, unfortunately, it did not build enough. The city was left to pave roads and build much of the utility system. Even after years of catching-up, major work remains. For example, utility distribution and collection system north of Pine Island Road is largely



non-existent. It will be a project the next city manager will oversee and have a great deal of responsibility for.

The second opportunity is economic development. Originally envisioned as a retirement community, it was felt Cape Coral did not need a vibrant commercial base. The overall commercial/industrial base (including the downtown) is limited. The city however, is not the city it was 20 or 30 years ago. More families call Cape Coral home and the residents have become younger overall. As a result, job creation has become a major focus of city staff.

Other opportunities involve preparing for and ensuring the city's governmental human infrastructure is ready for the future. In the short to medium term, some key staff members will be retiring and need to be replaced. At some point, the economy will suffer another downturn. As the sea level rises, it could impact the city. It is already beginning to see some saltwater intrusion in its water supply wells.

The Ideal Candidate

Cape Coral is seeking an outstanding, achievement-oriented leader and manager to help guide it in both the near and long term. The individual will truly be a professional manager—in demeanor, in actions, and in appearance. He/she will serve as a trusted advisor to the City Council and partner with it to develop plans to grow and sustain the city. The individual will be a visionary who thinks strategically, always looking over the horizon to anticipate problems and take the appropriate action, so they do not develop into significant problems. The ideal candidate will understand politics but not be involved.

The successful candidate will be approachable, friendly, and easy to talk to. He/she will have outstanding oral and written communications skills, realizing that listening is an important element of communication. The individual will not spend all his/her time behind a desk, but will be a visible figure in the field, the departments and the community. The manager will be able to communicate effectively to all walks of life and be as comfortable talking to a company president as to a day laborer. Building trust with officials and residents alike is critical; being humble and willing to admit a mistake will be important to establishing credibility.

The candidate will understand people and how to lead them. He/she will be flexible and open to the ideas of others. The individual will have high, but realistic, expectations and be supportive of staff. The manager will expect to be kept informed and believe strongly in accountability. The ideal candidate will be a mentor, helping staff members to grow and improve themselves. That said, when it is time to make a decision, he/she will not hesitate.

Providing outstanding customer service will be a guiding principle to the manager. He/she will lead by example and make an effort to solve problems rather than simply saying no. Having a sense of fairness as well as a sense of humor will be significant pluses. The individual will be positive, proactive, responsive, and involved. He/she will be open, honest, of high integrity, and value transparency. The manager will always be looking for ways to improve efficiency and encouraging the staff to do the same. He/she will be straightforward, while diplomatic.

The candidate will recognize Cape Coral's tremendous potential and work diligently to capitalize on it. The individual will need to balance daily tasks with developing long term plans. He/she will understand that everything cannot be accomplished in one year, and will allocate time to thinking about the future. Skill in economic development, water issues, utilities, capital projects, and finance will be important. Cape Coral needs to create an economic job base and encourage businesses to relocate to the area; skill in intergovernmental relations will also be important. At the same time, the individual will be environmentally sensitive.

The ideal candidate will have a minimum of 10 years of progressively responsible experience in public or private sector management, at least two years as a manager overseeing the efforts of at least 200 employees, and worked at a high level in a city with a population of over 100,000. A Bachelor's degree from an accredited college or university, with a major in administration, management or a related field, is required.

The Vacancy

The current city manager will be retiring after serving as city manager for almost eight years.

Compensation

The salary range is from \$180,000 to \$270,000. Benefits are reasonably generous.

Residency

The City Manager can reside outside city boundaries only with the express approval of the City Council.

Confidentiality

Under Florida's public records act, once an application is submitted, it is deemed a public record. As a practical matter, we generally do not expect media coverage until after the semi-finalists are named at the end of April.

How to Apply

E-mail your cover letter and resume to Recruit27@cb-asso.com by March 31, 2020. Faxed and mailed resumes will not be considered. Direct your questions to Rick Conner at (915) 227-7002, or Colin Baenziger at (561) 707-3537.

The Process

Applications will be screened between April 1st and May 3rd. Finalists will be selected on May 4th and interviews held on May 14th and 15th with a selection shortly thereafter.

Other Important Information

Cape Coral is an Equal Opportunity Employer and strongly encourages women and minorities to apply. The City values its small-town feel and is committed to serving its residents and businesses in a cost-effective manner.

Additional Information

For additional information about the city, visit:

www.capecoral.net/

www.capecoralchamber.com

COLIN BAENZIGER & ASSOCIATES
EXECUTIVE RECRUITING



Appendix C

Sample Candidate Report

Sample Candidate Report

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

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INTERNET SEARCH	35

Cover Letter and Resume

March 26, 2020

Mr. Colin Baenziger
Colin Baenziger & Associates
2055 South Atlantic Avenue, Suite 504
Daytona Beach Shores, Florida 32118

Dear Mr. Baenziger:

Please accept the enclosed résumé for the position of City Manager for the City of Cape Coral, Florida. I am confident that my organizational and leadership abilities, educational background, and diverse professional experience are well-suited to the specific requirements of the position.

As indicated in the enclosed résumé, my professional background includes more than 25 years of progressive and responsible local government management experience. As an ICMA Credentialed Manager, I presently serve as the deputy city manager for the City of Fort Lauderdale, Florida. Prior to Fort Lauderdale, I served as the city manager for the City of Savannah, Georgia. In that capacity, I reported to a nine-member city council, created a new strategic plan - [SAVANNAH FORWARD](#), led a family of 2,513 exceptional employees, and implemented a lean operating budget of \$408 million and a capital improvement plan in excess of \$407 million.

My previous experience includes serving as deputy county administrator for Broward County Florida; deputy county manager for Fulton County, Georgia; and assistant to the county administrator, Broward County, Florida. Collectively, my service in these progressive communities has provided me with extensive knowledge and expertise in all aspects of local government operations including affordable housing, strategic planning, transportation, budget development, community services, economic development and community revitalization, human services, and public safety, among others.

I am confident that I bring the right skills, experience and talents to the position. If you would like to schedule an interview or discuss my interest in the position, please contact me at (954) 940-1065 or at robhernandez@comcast.net. Thank you for your consideration.

Sincerely,

Roberto Hernandez

Roberto Hernandez

Enclosure:
- Résumé

ROB HERNANDEZ

1873 Northwest 113th Way, Coral Springs, Florida 33071 | 954-940-1065 | robhernandez@comcast.net

Profile

Proven, resourceful, and results-focused public administrator with more than 25 years of progressive local government management experience. ICMA-Credentialed Manager known for leadership, professionalism and organizational abilities.

Relevant Experience

Deputy City Manager City of Fort Lauderdale, Florida	2019 - Present
City Manager City of Savannah, Georgia	2016 - 2019
Deputy County Administrator Broward County Board of County Commissioners; Fort Lauderdale, Florida	2013 - 2016
Deputy City Manager City of Coral Springs, Florida	2011 - 2013
Deputy County Manager Fulton County Board of County Commissioners; Atlanta, Georgia	2008 - 2011
Assistant to the County Administrator Broward County Board of Commissioners; Fort Lauderdale, Florida	2003 - 2008
Various Positions Broward County Board of Commissioners; Fort Lauderdale, Florida	1994 - 2003

Education

Master of Public Administration
Nova Southeastern University; Fort Lauderdale, Florida

Bachelor of Public Administration
Florida International University; Miami, Florida

Current Professional Affiliations

International City / County Management Association (ICMA) – Credentialed Manager

Florida City / County Management Association

Broward City / County Management Association

Candidate Introduction

EDUCATION

- Master of Public Administration, Nova Southeastern University
- Bachelor of Public Administration, Florida International University

EXPERIENCE

- | | |
|--|----------------|
| • Deputy City Manager; City of Fort Lauderdale, FL | 2019 – Present |
| • City Manager; City of Savannah, GA | 2016 – 2019 |
| • Deputy County Administrator; Broward County, FL | 2013 – 2016 |
| • Deputy City Manager; Coral Springs, FL | 2011 – 2013 |
| • Deputy County Manager; Fulton County, GA | 2008 – 2011 |

BACKGROUND

Fort Lauderdale is the largest municipality in Broward County and the ninth most populated city in Florida, slightly ahead of Cape Coral. Smaller in geographic area than Cape Coral, the city encompasses 38 square miles with a population of 186,220. A popular tourism destination, the city is often referred to as the “Venice of America” because of its many inland waterways, not too dissimilar to Cape Coral’s “Water Wonderland” designation.

The City of Fort Lauderdale is a full-service municipal corporation that provides police protection, fire-rescue services, parks and recreation programs, potable drinking water to a service area both within and outside the City limits along with wastewater collection and treatment, sanitation services, development regulation, parking, and street maintenance. The City also operates a general aviation airport, a downtown heliport, an aquatic complex, and an auditorium. Its current general fund budget is more than \$373.7 million or \$832.7 million in total.

As the deputy city manager, I assist the city manager in overseeing municipal operations, specifically coordinating the activities of the Transportation and Mobility, Public Works, Sustainable Development and Parks and Recreation departments. Collectively these departments have a combined operating budget of \$380 million and 1,527 full-time employees.

The three most critical issues facing the city are:

- Infrastructure
- Resiliency
- Affordable Housing

Both Fort Lauderdale and Cape Coral have identified infrastructure as key elements of their adopted strategic plans. Fort Lauderdale’s emphasis is by necessity due to a series of recent high-profile infrastructure failures and a state mandated consent order. Fort Lauderdale’s initial development boom occurred between the 1950s and 1970s during which the majority of the city’s

infrastructure was installed. Materials of that era include cast iron pipe which is now failing regularly as a result of corrosion and erosion. From the 1990s until today, the city experienced a vertical development boom witnessed by large-scale redevelopment on its barrier island and downtown. This explosive growth was not matched by investments in infrastructure capacity, redundancy, and resiliency. Missteps occurred along the way, including transferring more than \$20 million annually from the Water and Sewer Fund to the General Fund as a “return on investment”, reduction in preventative maintenance activities, and failure to modernize its primary water treatment plant. The consequences of these decisions would surface years later as sewer main breaks, water line breaks, and flooding would disrupt life throughout the city. The City has identified more than \$1.2 billion in needed infrastructure improvements over the next 25 years. In addition to rectifying years of disinvestment in its water utilities, the City’s park system and public safety facilities have suffered a similar fate. The City is now implementing a \$200 million parks bond and \$100 million replacement police headquarters bond referendum to improve those facilities.

Sea level rise is Fort Lauderdale’s second biggest issue. Fort Lauderdale has made adaptation to climate change and rising sea levels a top priority. Many neighborhoods in Fort Lauderdale now experience chronic flooding on a regular basis. According to recent projections issued by the Southeast Regional Climate Change Compact, 10-17 inches of sea level rise by 2040 and 21-64 inches are possible by 2070. The City now requires the impact of sea level rise to be incorporated in future infrastructure master plans. Also, City-owned seawalls are being replaced and elevated, tidal valves have been installed in flood-prone areas, and the City is exploring the feasibility of raising road elevations in certain neighborhoods that are threatened by sea level rise.

Fort Lauderdale’s housing costs are now among the highest in the nation. More than 60 percent of households in the city spend more than 30 percent of their income on housing. The price of single-family homes has increased 41 percent since 2013. In 2018, the median sale price for a three-bedroom home was \$440,000. A four-bedroom home is now \$835,000. Given the high cost of homeownership, many are forced to rent; however, rental costs are equally unaffordable with the average two-bedroom rental costing \$2,705 monthly. Three bedrooms, \$3,204. The City is attempting to incentivize various housing types to support all income groups by providing zoning incentives such as height and density bonuses, no- or low-interest loans, or grants to developers to facilitate the construction of more affordable units. Without an affordable and diverse housing stock, the city, county, and region will not succeed in creating a diversified and balanced economy.

GENERAL MANAGEMENT STYLE AND EXPERIENCE

Cape Coral is a jewel for public administration professionals to practice their craft in a progressive environment. The challenges in Cape Coral are similar to those I have faced throughout my career as a city manager or deputy manager. For those reasons, I believe that the combination of my experience as a proven leader understanding local government in Florida, the ability to work with elected and appointed officials and the ability to understand and solve problems will allow me to excel as Cape Coral’s next city manager.

Many can manage but few can lead. Management is something I did earlier in my career; at this point in my professional career and personal life, I believe it is more important to exercise leadership. As leaders, we must communicate a clear vision and direction. We must demonstrate a passion for what we do – that is, to make a difference every day. For me, leadership is situational. When time, resources, and skills permit, my leadership style is participatory and collaborative. In other circumstances, it must be directive.

Great leadership is infectious. People are your greatest assets. It is important to create an environment where people want to work hard by making things fun, challenging, and rewarding. I believe in building a positive work climate where people are appreciated and valued. I like to consider myself a “macromanager” rather than a micromanager. I view my role as explaining the project or task, the expected result and deadline, and monitoring performance on a regular basis. I track projects and assignments using a Sharepoint site and meet with staff on a routine basis to review progress. I meet with staff more frequently on an as-needed basis. I describe what needs to be done, provide them the resources, get out of their way, and hold them accountable. So far, I think this approach has worked.

I am confident that staff and elected officials would describe me as professional, thorough, hard-working, ethical, honest, opinionated, and transparent. They would hopefully view me as engaged, participative and inclusive and valuing open communication and feedback, while also allowing for empowerment and accountability.

Two strengths that others will point to are my transparency and ability to make strategic decisions. In terms of a weakness, I believe that my commitment to my organization and loyalty to my teammates has led others to conclude that I can be defensive at times.

Regarding performance measurement, I believe it starts at the top with the governing body establishing a clear strategic vision for the organization, and cascades downward. Once key strategic objectives are defined by the governing board, it is the manager’s job to develop strategies to meet those strategic objectives. Business units then must identify those operational efforts and measures that are aligned with the strategies and long-term objectives. Those help form the basis for developing individual performance measures that are included in performance reviews.

In terms of a significant professional achievement, the revitalization of the Fulton Industrial District (FID) in metro-Atlanta, one the largest industrial, warehousing and logistics centers in the southeastern United States, is one that I am most proud of. In the fall of 2008, I toured FID as Fulton County’s new deputy county manager. What was once a leading center of economic activity was now rife with rampant prostitution, open drug sales, shuttered buildings, neglect, and decay. FID was well into a state of decline that began in the 1980s as its warehouses were abandoned for taller and larger ones elsewhere and manufacturing disappeared overseas. I observed conditions that I had never seen in my career until that day. Families called extended stay motels home. A police detective explained how FID was the child prostitution hub for the entire metropolitan Atlanta region. After a woman was found locked in a dog crate in one of FID’s many hotels, I was horrified and said: “not anymore – not on my watch.”

For the next three years, we made it our mission to make FID better. We used every conceivable resource within county government and put together a team of county agencies that included everything from arts to zoning. We rolled up our sleeves and went to work. We attacked the issues from every angle: from health to human services to public safety. With the help of a dedicated team, we accomplished a remarkable turnaround that included:

- Adoption of the Fulton Industrial Redevelopment Framework
- Designation by the State as an “Opportunity Zone”, providing needed economic incentives
- Establishment of the Fulton Industrial Community Improvement District, a self-taxing entity to take on area wide governance and improvements
- Establishment of the South Fulton Service Center which relocated two county commissioners, police, fire, and all other unincorporated area services to FID

Today, FID is healthy and vibrant. It is now a place where businesses invest rather than flee.

My biggest disappointment thus far involves the establishment of a fire assessment fee in Savannah. A \$14 million budget deficit welcomed me upon arriving in Savannah in October 2016. As I tackled the deficit with my new team members, I realized the City had a structural imbalance that needed a long-term solution. Although revenue growth was respectable, it lagged projected expenditures well into the future. Working with the city council, we agreed to a stopgap approach for Fiscal Year 2017 with the understanding that we would bring back long-term options the following year. Fiscal Year 2018 presented a \$12 million imbalance and to address it, I proposed a fire service assessment using an approach and the same consulting firm as Cape Coral. After spending considerable time and effort creating such a fee, the city council adopted the budget with this fee. The fee provided financial stability, allowed us to lower the millage rate, and provided resources to address capital needs and service priorities. The fee was controversial and faced stiff public resistance. Continued opposition to the fee caused the city council to reverse its decision midway through the fiscal year, requiring us to identify more than \$16 million in new revenue and expenditure reductions. Rescinding a budget halfway through the fiscal year was disruptive to operations. In retrospect, I did not anticipate such stiff opposition since we held more than 60 community meetings and thought we had obtained community buy-in to the extent we could. Newspaper editorials supported our approach. In the end, the fire assessment was reversed, the equivalent of two engine companies eliminated from the fire department’s budget, and the millage rate increased. The painful lesson I learned throughout all of this is that local government must do a better job educating the public on how well it is performing and safeguarding the public’s resources. It was a painful lesson – it still hurts to sit to this day.

Employee terminations are always an unfortunate aspect of what we do as leaders. Unfortunately, I have had to dismiss employees throughout my career for poor performance or poor leadership. While it is never an encounter that brings pleasure or satisfaction, these separations were not a surprise to the affected individual. In every instance the individual was counseled and made aware of performance deficiencies beforehand, corrective actions identified, and the consequences of not meeting the performance standards explained. I hope that in every instance, I treated the employee with respect and dignity. I allowed them to “write their final chapter” with the organization and

allowed them to leave at the top of their game with a celebration of their accomplishments to the organization.

The issues and challenges facing Cape Coral's next city manager are:

- Leading in the Post COVID-19 Era.
- Ensuring continued Smart Growth.
- Continuing to expand and upgrade critical infrastructure.

Sadly, Cape Coral's next city manager will have to lead the organization through the aftermath of Covid-19's devastation. Although the City has a diversified revenue base not overly dependent on one specific funding source, it can expect revenues of all types to be impacted. While the financial realities of the pandemic will become clearer in the months to come, Cape Coral's next city manager will need to assess the financial impacts and determine how to continue basic municipal services, allow for certain aspects of the local economy to resume and balance the workforce and service demands with the new fiscal realities.

Second, Cape Coral's next city manager will need to continue to position the city for growth once the post-COVID 19 recovery begins to take shape. The City will need to continue progressive land use policies and zoning incentives to attract orderly and smart development to greenfields and redevelopment. Promoting growth in the tax base and employment for the city's residents must be a top priority. Fortunately, Cape Coral is well-positioned to attract further economic investment once the nation and the state adjust to the realities of the post-pandemic world.

Finally, investments in infrastructure must continue to drive the next city manager's agenda. During difficult times, many municipalities defer or eliminate investments in critical infrastructure improvements. This is a grave mistake and the next city manager must avoid the urge to gut capital investment plans. Since capital investments are long-term in nature, it is important that Cape Coral's next city manager appreciates the need to ensure adequate investments are made in all facets of municipal infrastructure including roadways, water utilities, facilities, and information systems. For Cape Coral, this includes expanding infrastructure utilities to areas currently not served plus parks and open space to accommodate neighborhood growth. The benefits of such continued investment will pay off in the longer-term. It is important to take a long-term view rather than an immediate one, however painful it may be.

If selected for the position, during my first six months I will:

- Listen, listen, and listen to understand issues, challenges, and desires of all stakeholders: elected officials, neighborhood groups, organized labor, business community, education representatives, the local media, and others;
- Forge a close relationship with the City Council and Mayor;
- Review goals and objectives for the organization with the Mayor and City Council;
- Reach out to department directors and learn about their challenges, priorities, and programs;

- Meet as many employees as possible by conducting several “town hall” sessions;
- Establish trust and credibility with all stakeholders; and.
- Become familiar with the community and its culture.

As for media relations, I appreciate the work the media does. The media can be a great asset if managed properly and cultivated. Being open and honest with them is important. Integrity is an essential part of the relationship with the media. In Savannah, I practiced an open-door policy with the media and reserved a better part of Tuesdays to meet with them. I am not aware of anything in my background that could be considered embarrassing to a potential client.

Social media is an effective tool in keeping the public informed and is changing how government communicates with its various constituencies. I have used social media, primarily twitter, to keep interested individuals informed with short briefs on an issue. This helped us shape our story and put us in leading the community conversation rather than delegating that role to media. I have used social media to help sustain interest on an issue and to keep the public informed on upcoming discussions or significant events. During workshops or regular meetings of my elected body, we would “tweet” aspects of the discussion. In Fort Lauderdale, we rely on ZenCity to help us mine social media on a regular basis to help us gauge public sentiment on a variety of issues.

There is “no dirt” on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night. I also treat people with professionalism and respect. I am honestly not aware of anything in my professional or personal lives that could be viewed negatively. However, while serving as the city manager of Savannah, there were a few individuals who were not supportive of my efforts or views. You may find some blogs critical of my opinion on building materials in the city’s landmark historic district, my hesitance in assuming the operating costs of a regional expressway, and of the ill-fated fire assessment. Regardless, I always conducted myself professionally and never brought any negative attention to the elected officials or the organization I worked for.

My personal interests include the outdoors and pursuing home improvement projects.

ADJECTIVES OR PHRASES THAT DESCRIBE ME:

Driven, Professional, Focused, Disciplined, Organized, Thorough

REASONS FOR CONSIDERING LEAVING CURRENT POSITION:

I am considering opportunities beyond Fort Lauderdale because I believe that I can have a greater impact on an organization and a community by serving in the top leadership role.

CURRENT SALARY

+/- \$217,000 plus \$4,680 auto allowance and \$1,310 cell phone allowance.

CB&A Background Checks

**Background Check Summary for
ROBERTO HERNANDEZ**

Criminal Records Checks:

Nationwide Criminal Records Search	No Records Found
County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
State	
Florida	No Records Found
Georgia	No Records Found

Civil Records Checks:

County	
Broward County, FL	No Records Found
Chatham County, GA	No Records Found
Fulton County, GA	No Records Found
Federal	
Florida	No Records Found
Georgia	No Records Found

Motor Vehicle

Florida	No Records Found
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Credit

Very Good

Bankruptcy

No Records Found

Education

Confirmed

Employment

Confirmed

Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern.

**Background Check Summary for
ROBERTO HERNANDEZ
Personal Disclosure**

Personal Disclosure Questionnaire

Name of Applicant: ROB HERNANDEZ

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?
Yes ☐ No ☒
7. Have you ever sued a current or former employer?
Yes ☐ No ☒
8. Do you have a personal My Space, Face Book or other type of Web Page?
Yes ☐ No ☒
9. Do you have a personal Twitter Account?
Yes ☐ No ☒
10. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?
Yes ☐ No ☒
11. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant.
NONE

Attested to:


Signature of Applicant

Please email this form via PDF DOCUMENT to Lynelle@cb-asso.com or via fax to
(888) 539-6531 no later than 5:00 PM PST 04/13/2020.

(Note: Please be sure to sign the form with your actual signature if you are sending Fax or PDF Document)

Property of Colin Baenziger & Associates

CB&A Reference Notes

Reference Notes

Roberto “Rob” Hernandez

Elizabeth Taschereau – Director of Developmental Services, City of Margate, FL
954-884-3686 954-218-9798

Ms. Taschereau has known Mr. Hernandez since 2011 when he was hired as the Deputy City Manager for Coral Springs. She was the Community Redevelopment Agency Coordinator and reported to him. She later followed him from Coral Springs to the Savannah when he became the City Manager. She had enjoyed working for him and had wanted to continue learning from him so much that she willingly commuted between her home in Florida to her job in Georgia. After he left Savannah to go to Fort Lauderdale, she also left.

Mr. Hernandez was a successful and professional leader. He had strong project and time management skills. Ms. Taschereau especially admired how well he kept track of numerous project deadlines on his calendar, which she had access to when working under him. He worked well with team and delegated excellently. The only possible weakness he had was his high expectations. He strove to accomplish much, and he expected his staff to perform similarly. Such expectations may have been overwhelming for some who were unsure of their abilities to accomplish their tasks. However, staff members were able to look back and be amazed by how much and how well they accomplished those tasks. Though his high expectations were a challenge for some, many Cities turned around for the better because of his drive.

Mr. Hernandez worked on numerous high profile projects, such as building a new city hall. The old city hall was built in 1905. It was very much out of date and far too small for a city of Savannah’s size. That said, building a new city hall spurred a great deal of controversy over architecture and location. Recognizing it as a critical need, Mr. Hernandez took charge of the project and eventually achieved community acceptance of the building’s location downtown and of the architecture. It all came about in approximately a year and a half and the new city hall celebrated its grand opening in 2018. Another significant project he worked on as upgrading the City’s arena while working with a management company. He was able to renovate the facility while negotiating a contract that was eventually approved by the County Commissioner. It was a huge accomplishment.

Mr. Hernandez was very inclusive of employees in projects, meetings, emails, status reports, memos, and other forms of communication. He communicated in a way they easily understood, and he expected his staff to communicate with him. Such an inclusive mindset was different for staff from the Cities of Coral Springs and Savannah, where the culture was less inclusive. He managed several internal and external projects that involved multiple people across different divisions. Many commented how they had not enjoyed such high communication levels before Mr. Hernandez came. Previously, little communication occurred between divisions. As such, decisions were delayed and less efficient. When he effectively included different groups to integrate on multi-division projects. He helped projects move forward.

Mr. Hernandez also generally made good decisions. He had high integrity. He made the best recommendations and decisions possible for the community as a whole. He did consider the input of groups with special interests, but he strove to make the best possible decision. He also made good decisions with staff members. For example, he reorganized the Savannah City staff, which

Reference Notes

Roberto “Rob” Hernandez

composed of approximately 2,400 employees. This momentous change created openings, which he filled with sharp and high performing individuals. The new employees immediately began planning and establishing standard procedures. The City began to change, and consequently, so did the community. Furthermore, Mr. Hernandez greatly believed in committees. He formed several committees with the Human Resource Department and with staff, sometimes even bringing in external panel members if necessary. He wanted people in high-level positions to make decisions together.

As a great public speaker, Mr. Hernandez worked well with the public. He always remained composed and professional. He had excellent presentation skills. People were generally perceptive to his ideas when he spoke, and he communicated well when invited to speak for different organizations. Even if some people at those meetings were exceedingly unprofessional toward him, he managed himself well. He performed well despite those difficulties. In addition, Mr. Hernandez worked well with individuals. He educated others, providing recommendations on what the Mayor and others needed to vote on. Because of these interpersonal abilities, Mayor and Councilmembers voted on multiple successful projects. Moreover, Mr. Hernandez had good financial skills. He used a hands-on approach with the city budget and worked closely with chief financial officers and the Budget Director. He wanted to ensure he understood the budget accurately.

Though a change agent, Mr. Hernandez did not seek change for the sake of change. He carefully evaluated a City’s situation, whether involving technology, processes, or even City culture. He observed how others managed tasks before he made necessary changes to keep the City moving forward. Ms. Taschereau has done her best to incorporate this valuable lesson into her own leadership skills. Also, Mr. Hernandez an effective problem solver. He solved numerous issues that had existed for long periods of time. Some problems required many changes and more money, which made certain solutions difficult to implement. He attempted to solve these, and then he put plans into place to initiate these necessary changes once enough resources were available. Other problems were out of his realm of influence. As such, Mr. Hernandez made good recommendations, even if people did not follow his advice.

Ms. Taschereau is unaware of anything in Mr. Hernandez’ personal or professional background that will concern a future employer. She would definitely hire him if possible. As someone who has worked for him, she knows how good he is at overcoming challenges and managing a city. Mr. Hernandez is passionate about municipal work. He wants his employers to be high-performing organizations. He has been and will continue to be a very good Manager.

Words or phrases used to describe Roberto Hernandez:

- Successful,
- Professional,
- Collaborative,
- Inclusive,
- High integrity,
- Good speaker, and
- Influential.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Project management, leadership and staff management, presentation abilities, financial understanding.

Weaknesses: His high expectations can be daunting at time, but his expectations drive people to accomplish goals they previously thought they were incapable of achieving.

**Skye Patrick – former Director of Libraries, Broward County, FL 562-940-8400
562-659-1155**

Ms. Patrick has known Mr. Hernandez since 2014. She really enjoyed working with him and learned much from him.

Public Administration was Mr. Hernandez’s strong suit. He was thoughtful and he understood County policy and procedures very well, which meant he navigated in a way that was very helpful to his department. He did not know much about the library system when he was hired, but he studied and learned about how they operate and developed a good understanding.

The Directors hired by Mr. Hernandez were very good selections. He sat on the panel that hired the Finance and Business Administrator, and helped with the searches for the Aviation Director and Human Services. When making decisions in general he was very thoughtful and took the time to gather information.

In general, Mr. Hernandez maintained the organization at a high level and had learned from his department heads to be innovative and creative. They had a monthly meeting where Mr. Hernandez provided information on organizational changes. Ms. Patrick headed a very large organization with many issues. He was always available and responsive.

Some community members were very aggressive. Mr. Hernandez took the time to attend both scheduled and off the cuff meetings with individuals who had concerns about an issue. His openness and willingness to address an issue immediately, without any delay, was impressive.

In his capacity Mr. Hernandez really tried to lead the organization, and was creative and thoughtful in meeting goals. He worked very well with the Board, which consisted of nine voices with sometimes conflicting concerns. He protected the department heads when necessary and did a great job balancing the administration and the politics, which is no small feat.

Several major personnel issues involving union members were escalated to upper management. Mr. Hernandez was not required to attend the meetings but he came to help negotiations. The union had between 500 and 600 members. He helped navigate the very rocky road between the union relationship and County protocol. He showed great initiative in addressing problems that existing prior to his arrival. He helped resolve long-standing issues in only 2 to 3 meetings.

Mr. Hernandez was given directives to create a business plan for the new Panther Stadium. The process took several months and he worked with several departments to create the business model. He also worked on a new transportation plan that was very complex. The process has spanned for several years and involves 15 of the 31 cities in Broward County.

Reference Notes

Roberto “Rob” Hernandez

They were short 800k in a capital budget of \$5 million dollars. Mr. Hernandez worked with the staff to review the overall budget and prioritize projects. Several of the big-ticket items related to technology were prioritized, and he found a way to upgrade their enterprise software.

They only knew each other for a few years, but Ms. Patrick does not know anything controversial that involves Mr. Hernandez.

Broward County has a \$6.5 million dollar budget with 31 cities plus some incorporated areas. Ms. Patrick would hire Mr. Hernandez and feels he is well suited to run a community the size of Broward County or slightly larger. Every department head he worked with has a positive opinion of his management and leadership qualities. Employees are comfortable working with him and felt very supported by him. He ensured that Ms. Patrick had the financial resources she needed. She confidently recommends him for a Manager position.

Words or phrases used to describe Roberto Hernandez:

- Extremely thoughtful,
- Very intelligent,
- Incredible business mind,
- Perfectly capable administrator,
- Incredible leadership qualities, and
- Shows initiative and foresight to present quantifiable outcomes.

Strengths: Thoughtful; understands policy and procedures; public administration; learns what he needs to know.

Weaknesses: He could have a greater understanding of the different lines of work that each department head was responsible for.

Van Johnson – Mayor, City of Savannah, GA 912-651-5988 912-651-6444

Mr. Johnson worked with Mr. Hernandez between 2016 and 2019 when Mr. Hernandez became the Savannah City Manager. Mr. Johnson and Mr. Hernandez had a good relationship.

Mr. Hernandez performed decently as City Manager. He was smart, strong-willed, and a hard worker. He was a workhorse who innovatively tried to find solutions to problems. He was always quite professional, cordial, and direct. At times, his passion and directness may have caused people to think Mr. Hernandez was emotional or overly direct. However, these traits were a function of his military background.

Mr. Hernandez had good communication skills. He kept Mr. Johnson informed via email, phone, and personal communication when appropriate. Mr. Hernandez generally made good decisions and usually made good decisions when hiring personnel. He was customer service oriented. He accomplished tasks in a timely manner.

Additionally, Mr. Hernandez tried to make the City to a high-performing organization. He recognized several structural financial issues within the City and put the City on track. He was

Reference Notes

Roberto “Rob” Hernandez

both a leader who rallied employees around the organization’s vision and a manager who oversaw processes behind a desk. He worked hard to effectively solve problems to the best of his abilities. For example, he brought about a strategic plan for the City, which had not existed prior to Mr. Hernandez’s arrival. He led the Council and the organization to determine a goals and priorities. The Savannah Forward strategic plan is still currently used.

One of the largest criticisms against Mr. Hernandez was that he was less social than the public expected their Manager to be. Certainly, he was kind and polite. He had experience working with the public and sometimes was out in the public attending community meetings to represent the organization. However, he often worked more than he socialized.

At times, Mr. Hernandez experienced some difficulties wading through the City’s Council-Manager form of government. These hardships were not entirely his fault because some councilmembers violated these lines at times. Usually, Mr. Hernandez persevered. Eventually, these challenges became too much for him to bear. For example, he proposed instituting a City fire fee similar to what Florida cities used to address the City’s structural deficits. The Council accepted the idea. However, when the public became upset with the fee, the Council blamed him for the failure. Furthermore, the previous Mayor needed a scapegoat for some of his poor decisions and blamed Mr. Hernandez – even though the City Manager only carried out decisions made by the City Council.

Mr. Johnson is unaware of anything in Mr. Hernandez’s background that will concern a future employer. If given the opportunity to rehire Mr. Hernandez, Mr. Johnson would consider him as a candidate. Given the difficult circumstances in Savannah, Mr. Hernandez was a great Manager.

Words or phrases used to describe Rob Hernandez:

- Smart,
- Strong-willed,
- Hard worker,
- Good work ethic,
- Innovative, and
- Professional.

Strengths: Work ethic, innovative solution finding.

Weaknesses: Mr. Hernandez’s passion and directness may have been misconstrued as being emotional or overly direct.

Claudette Bruck – former Commissioner, City of Coral Springs, FL 954-562-2526

Ms. Bruck has known Mr. Hernandez since 2011. He was their Deputy City Manager for all too short of a time. They were sad to see him leave and would love to have him back.

Mr. Hernandez was extremely bright, very diligent and focused. When he first came to the city he first stood back and analyzed the organization. When it was his turn to speak, he impressed

Reference Notes

Roberto “Rob” Hernandez

everyone. His presentations are flawless but factual. Everything he said was entirely trustworthy; he presented information he could stand behind.

Their interactions were all professional. Mr. Hernandez was very respectful. He listened and was prompt in responding to inquiries. His decisions when hiring personnel were very good. He was innovative and operated at a high performance level. He listened, assessed a situation, and then came forward with an excellent recommendation. He was very experienced and innovative.

Mr. Hernandez frequently gave presentations at workshops, commission meetings and community meetings and always did an excellent job. He had good rapport with the audience and a demeanor that invited trust.

Mr. Hernandez kept the Commissioners informed as appropriate. The Manager’s office operated independently of the Commission. Rather than reporting in on a daily basis, they did so at special meetings or as needed. Mr. Hernandez did not have the opportunity to work one-on-one with residents, but he did present information about projects to the community. He was always prepared and answered questions on the spot.

The Commission received much information from varying sources, and the information was not always accurate. They felt very fortunate to have Mr. Hernandez on staff and trusted his accuracy. He led the organization well because he earned the trust of employees.

Mr. Hernandez played a significant role in pension discussions. He responded to questions at community and commission meetings. He followed through and was customer service oriented. He always did what said to do. He was not directly involved in the finance department or the creation of the budget, but he had a good understanding of the numbers.

Ms. Bruck is unaware of any controversy involving Mr. Hernandez. She would hire him and feels he would be a great Manager. He was knowledgeable, experienced, task oriented, focused, and could always be trusted. His departure was a tremendous loss to Coral Springs.

Words or phrases used to describe Roberto Hernandez:

- Trustworthy,
- Bright,
- Quick study,
- Serious about his position,
- Honorable, and
- Innovative.

Strengths: Very thorough; brought an idea forward only after it had been thorough researched; good at identifying problems and determining solutions.

Weaknesses: None identified.

Reference Notes

Roberto “Rob” Hernandez

Brooks Stillwell – former City Attorney, City of Savannah, GA 912-484-1690

Mr. Stillwell worked with Mr. Hernandez between 2016 and 2019. During this time, Mr. Stillwell was the Savannah City Attorney and Mr. Hernandez was the City Manager. They worked closely together daily and reported to the City Council.

Mr. Hernandez was a great City Manager operationally. He worked hard and had good fiscal planning abilities. He had several good ideas for the City and was a good strategic planner. He possessed a long-term vision of what he wanted to accomplish and strove to quickly achieve those goals. He was driven and dedicated.

Mr. Hernandez managed day-to-day operations exceptionally well. He worked well with staff members and those close to him in the office. He met with Mr. Stillwell during weekly meetings with City leaders and kept the City Attorney well informed.

As a change agent, Mr. Hernandez came in and proposed several changes to help the City run better. He initiated several positive transformations, such as with implementing the City’s strategic plan. However, Mr. Hernandez implemented other changes too quickly for the historical City to handle. For example, he tried to completely change the City’s property exchange, planning, and financing. Each area’s change was tough individually, but all these at once were especially difficult to maintain.

Savannah is a very unusual city. Its roots go back almost 300 years and Mr. Hernandez did not fully appreciate how the City’s unique historical culture differed from the culture found in his previous positions in Florida. In past jobs, he rarely handled city politics as the person second in charge. In Savannah, he had to involve himself more than he had previously done. The City traditionally expected the City Manager to be its Chief Executive Officer and to be heavily involved with the entire community outside of city government organization. As such, Mr. Hernandez had to work with county officials, chamber commerce, state legislature, and community leaders. Though Mr. Hernandez worked well with staff, he did not see community politics as part of his job, which was a large issue for the City. He frankly did not anticipate the public blowback from some of the programs he recommended the City Council implement. As such, he faced many challenges.

Even though many of his ideas were conceptually good, Mr. Hernandez was unable to bring the public to side with his solutions. For example, he tried implementing a fire fee to unburden property owners’ taxes. He saw the fee as a method of fixing the City’s fiscal problem. Though he initially had the Council’s support, Mr. Hernandez eventually faced huge public backlash. Then some council members tried to politicize the plans which led to the fee being poorly implemented. Mr. Hernandez also tried to implement a union contract with the fire union, which ended up facing public blowback as well. He had little Council support because such a plan did not translate well to Georgia.

Eventually, Mr. Hernandez left the City to return to Florida. Both his wife and he were unhappy with how rough this period was for them. He gave several months’ notice before his resignation.

Reference Notes

Roberto “Rob” Hernandez

Despite these issues, Mr. Hernandez was a great City Manager. He spoke well with public groups. He was an excellent fiscal manager. He generally made good decisions and hired personnel quite conscientiously. He was particularly customer service oriented. He was a leader who had a vision of how to accomplish goals and who tried to mold the City’s organizations to this vision. He accomplished tasks in a timely manner. He set goals and timeframes to move forward. He solved several problems effectively. He successfully implemented the complete reorganization of the City’s organizational department. He worked hard through stress to overcome issues. He also was outstanding with crisis management, such as when the City dealt with two hurricanes.

Any future employer will need to discuss what they expect Mr. Hernandez to do and what he expects to do with public and community leadership. These clear explanations are critical. Mr. Hernandez will perform well under a strong County Manager or strong Mayor who assumes all roles of working with the public. Mr. Hernandez understands how this type of government is organized and will do well in this system. Mr. Hernandez was an excellent City Manager on a whole, just not for the City of Savannah.

Mr. Stillwell is unaware of anything in Mr. Hernandez’s personal background that will concern a future employer. Though Mr. Stillwell would not rehire Mr. Hernandez for the City of Savannah, Mr. Stillwell would definitely hire Mr. Hernandez for most any other municipality. A future employer will not find a more dedicated, hardworking person who can implement ideas well. Mr. Hernandez has been and will continue to make a good Manager.

Words or phrases used to describe Rob Hernandez:

- Tremendously hardworking,
- Good strategic planner,
- Aggressive in a good way,
- Dedicated, and
- Visionary.

Strengths: Long-term planning, fiscal planning, management skills.

Weaknesses: Interacting with public and political leaders was hard for Mr. Hernandez, who was used to a more strictly managerial position.

Zachary Williams – former Fulton County Manager, GA 404-990-6545 404-371-2881

Mr. Williams has known Mr. Hernandez since 1994. They worked closely from 2008 to 2011 when Mr. Hernandez was the Deputy County Manager. He did an excellent job. His work performance, personality, and interactions were outstanding. He was handpicked from South Florida to come and work for Mr. Williams.

Mr. Hernandez had an excellent work relationship with his elected officials. They trusted that what he said to had been well researched. He earned their respect and represented Mr. Williams very well.

Reference Notes

Roberto “Rob” Hernandez

Once he had been given a problem to solve, Mr. Hernandez was tenacious. He marshaled resources and focused them through team building to get the job done. He did not shy away from challenges. He was patient when it was warranted; however, it did not come naturally to him.

Mr. Hernandez preferred face-to-face interactions whenever possible. If meeting a person directly was not an option, then he used the phone. He was an excellent writer and could be successful using email; however, he had developed respect from his subordinates by meeting with them personally, listening to their issues, and explaining his thoughts.

Depending on the nature of the decision that needed to be made, Mr. Hernandez responded quickly. Circumstances that required gathering facts may have taken him longer. He was not indecisive but rather took the appropriate amount of time to gather the information and opinions he needed to make good decisions.

Mr. Hernandez hired good employees. In some instances where a hire did not work out, he did all he could to work with them. He went through exhausted hiring practices involving many stakeholders. He was analytical and used that to his advantage in the hiring process.

Mr. Hernandez was innovative but did not try to change things just for the sake of change. He was mature enough to leave a process alone when it worked well. He had improved existing processes in Fulton County.

Mr. Williams was proud of the redevelopment that was carried out on Fulton Industrial Boulevard. Under Mr. Hernandez’s leadership, an area known for drugs, prostitution, and crime had reversed its negative direction to become an area where businesses wanted to locate. Mr. Hernandez created momentum in this large container warehousing district. He acquired State funding and formed a commercial improvement district.

There were very few tasks in public service Mr. Hernandez could not do well. He is ready to take the helm of an organization and become a Manager. Mr. Williams gives him his full and complete endorsement and support. Mr. Hernandez was one of the best public servants Mr. Williams has ever worked with.

Words or phrases used to describe Roberto Hernandez:

- Embodies what public service should be,
- True believer in the mission to make other people’s lives better,
- Tenacious,
- Analytical,
- Hardworking, and
- Professional.

Strengths: Problem solving; tenacity; marshaling resources; and team building.

Weaknesses: He could be patient when it is warranted; however, it did not come naturally to him.

Reference Notes

Roberto “Rob” Hernandez

**Dele Lowman – former Assistant to the County Manager, Fulton County, GA
(404) 612-8331**

Ms. Lowman worked with Mr. Hernandez in the Fulton County Manager’s Office. She had known him since 2003 where they worked together in Broward County. They had a good working relationship. He was very diligent and mission focused.

When Mr. Hernandez first arrived in the Administrative Office in Broward, she was working as a graduate being mentored by the County Administrator. She was told to watch Mr. Hernandez and learn from how he took a task, broke it into small parts, and organized people to get the job done. If there was something he did not know he studied to become more effective.

Mr. Hernandez and Ms. Lowman had philosophical differences yet got along quite well. His military background had shaped his personality and made him the driven person he was. He worked well with elected officials. He spent most of his time with the commissioner over the unincorporated areas. Though their interests were not always the same, they worked well together. He had the respect of the commissioners. Mr. Hernandez valued loyalty. His greatest strengths were diligence and following through. No matter how difficult a situation had become, he did what he needed to for the best interest of the community.

Laser focus was both strength and a weakness for Mr. Hernandez. In his current role as second in command, he did what he was asked without stepping back to see if there was another way. If he was the final decision maker, perhaps that would have been different. Unlike many managers, Mr. Hernandez did not have an aversion to staff meetings. He liked to speak with people face-to-face. He was more than capable of interacting via telephone and email, but he favored the personal approach when dealing with direct reports.

Mr. Hernandez was a great public speaker. He had a teaching background in the military. He interacted well with the public and dealt with residents often in the unincorporated area.

One task Mr. Hernandez was asked to take on was building the first amphitheater on the south side of the county. It was an overwhelming project with an unreasonable timeline and difficult budget. He did an outstanding job and followed it through to opening day.

There are certain people Ms. Lowman has worked with that she would hand pick to be on her team and Mr. Hernandez is one of them. She highly recommends hiring him.

Words or phrases used to describe Roberto Hernandez:

- Focused,
- Reliable,
- Diligent,
- You can trust him to do what he says,
- Professional and,
- Hard working.

Reference Notes

Roberto “Rob” Hernandez

Strengths: Diligence; follow through; loyalty.

Weaknesses: Laser focus, however he might step back if he were the manager.

Bill Durrence – former Alderman, City of Savannah, GA 912-247-8108

Mr. Durrence worked with Mr. Hernandez between 2016 and 2019. At the time, Mr. Durrence was in his first term as Alderman. Mr. Durrence was one of the Savannah City Councilmembers who hired Mr. Hernandez to be City Manager. Mr. Durrence was one of Mr. Hernandez’s directors.

Mr. Hernandez possessed an impressive and thorough understanding of the City. He had extensive knowledge from public works to finance. He was as open as possible with councilmembers. Even though working for nine directors made things complicated, Mr. Hernandez was exceptionally competent and provided numerous innovative ideas. He was good internally and developed good staff relationships. He accomplished tasks in a timely manner. He was highly skilled in running the City.

Mr. Hernandez offered many solutions to the City’s issues. He helped councilmembers understand the reason for the City’s problematic budget stresses. Although the City was a successful destination for tourism, very little of that money went to the City’s coffers. Certainly, some sales tax revenue came to the City, but most went to businesses involved with tourism. Mr. Hernandez clearly identified the City’s financial stress points.

As good as he was with finances, Mr. Hernandez struggled to maintain public posture as Savannah City Manager. First, he underappreciated the historical nature and character of the City that brought much community pride. Because historic landmarks and districts made the City different, many people expected solutions to be likewise unique. Local attitude often discouraged researching how other places solved similar problems. Mr. Hernandez’s approach to look at other cities’ solutions made people feel slighted. As such, he missed an opportunity to engage early and gain the public’s support. Second, he was generally more of a hands-on manager who seemed uncomfortable interacting in social management of a highly networked City. He was more comfortable rolling up his sleeves and working than being a public face for the City. Because he did not engage people to his side, he was less effective than he could have been.

Mr. Hernandez generally made good decisions. He also hired well for many top staff members, including the Fire Chief, Police Chief, and Human Resources Director. He often reached out to other senior staff when looking for personnel, and this collaborative approach was helpful. Some personnel he inherited were not highly qualified for their positions. At one point, Mr. Hernandez successfully moved senior personnel to fill vacancies. Prior to this major shuffle, staff members were scattered all over the City, causing much unnecessary work. He consolidated staff, thus making processes more efficient. Occasionally, Mr. Hernandez needed to be more disciplinary, but he eventually let a number of problematic people go. For example, he fired the Director of the Department of Revenue because she was simply unable to fix a particular issue, even after being given adequate time and resources.

Reference Notes

Roberto “Rob” Hernandez

Mr. Durrence is unaware of anything in Mr. Hernandez’s background or conduct that will concern a future employer. If given the opportunity, Mr. Durrence would rehire Mr. Hernandez. Being new to a large leadership position as Alderman, Mr. Durrence understands the learning curve Mr. Hernandez faced while being City Manager for the first time. Mr. Hernandez was a bright individual who experienced valuable lessons. He was a good Manager.

Words or phrases used to describe Rob Hernandez:

- Knowledgeable,
- Competent,
- Introvert,
- First rate manager,
- Innovative, and
- Open.

Strengths: Financial skills, extensive understanding of how to run a city, executive functioning.

Weaknesses: He did not fully appreciate the City of Savannah’s uniqueness and had a hard time connecting with the City’s people.

William “Bill” Hubbard – Chief Executive Officer, Savannah Area Chamber of Commerce, GA 912-657-9207

Mr. Hubbard and Mr. Hernandez interacted when Mr. Hernandez was the Savannah City Manager between 2016 and 2019. They have since messaged each other occasionally.

When Mr. Hernandez worked in the City, he communicated fairly regularly with Mr. Hubbard. Mr. Hernandez called and sent emails. He sometimes dropped by Mr. Hubbard’s office, and they typically saw each other weekly during city events.

Mr. Hernandez was a decent City Manager. Mr. Hernandez was a good, smart man. He was quite professional and thoughtful. He had good financial grounding. He built good staff around him and organized them well. He generally made good decisions. He also did a great job with reorganizing the city staff. At times, though, Mr. Hernandez made some poor staffing decisions. For example, he left an engineer in a developmental position a bit longer than others might have preferred. Additionally, he let go an assistant city manager by leaving a note on her chair. Although several elected officials asked him to let her go, this approach was unprofessional.

Mr. Hernandez faced difficulties integrating himself in the community. As a first time city manager, Mr. Hernandez was not accustomed to being one of the City’s key leaders. He wanted to ensure others did not accuse him of playing favorites. As such, he interacted with the philanthropic, nonprofit, church, and business communities on a purely business level. He experienced difficulty developing tough enough skin to deal with criticism. This weakness held him back and

Reference Notes

Roberto “Rob” Hernandez

undermined his ability to be effective. Despite his strengths as City Manager, his inability to fully participate in the community affected the public’s confidence in him. He needed to get to know these smaller communities better.

Mr. Hernandez was a good manager who oversaw processes behind a desk. He had great management skills and good knowledge of running a city. He thoroughly researched various solutions and made decisions effectively. For example, he led a team in providing a strategic plan in a fairly short time period. He worked with elected officials to agree to this plan.

Unfortunately, Mr. Hernandez had challenges working through the politics to implement the strategic plan. In one instance, Mr. Hernandez proposed a fire fee to help city finances. Around this time, the City had collected approximately \$10 million in revenue. While garnering public support for the fire fee, Mr. Hernandez was also especially transparent with this revenue. Because the public misunderstood how the revenue was not part of the City’s own earnings, people were particularly upset with the fee. Mr. Hernandez had admirable intentions to be transparent, but his timing cost him the fire fee concept.

Despite these challenges, he was always polite and diplomatic with people. Even when church groups angrily protested and wanted him fired, he kept going. He handled stress well for the most part and never showed a temper. Eventually, however, Mr. Hernandez and his wife left the City because they felt alone.

Mr. Hubbard is unaware of anything in Mr. Hernandez’s professional or personal conduct that will concern a future employer. Mr. Hernandez had been purely professional, honest, and transparent. Although Mr. Hubbard would not rehire Mr. Hernandez to be City Manager, Mr. Hubbard would consider Mr. Hernandez for an Assistant Manager position. Mr. Hernandez was strategic and smart. He would excel in the responsibilities expected of a Deputy Manager.

Words or phrases used to describe Rob Hernandez:

- Professional,
- Good guy,
- Quite thoughtful,
- Polite,
- Diplomatic, and
- Capable.

Strengths: Financial skills, building good staff.

Weaknesses: He was politically weak and often distant from constituents.

John Hearn – City Attorney, Coral Springs, FL 954-344-1011

Mr. Hearn has known Mr. Hernandez since 2011. In terms of job performance, Mr. Hernandez was very energetic and a go-getter. He really moved projects along and stayed on top of them. He was a change agent.

Reference Notes

Roberto “Rob” Hernandez

City Hall was in an office that was built by General Electric for selling homes. The City had been trying to build a City Hall since 1993. Mr. Hernandez really energized those involved, and the new City Hall was finally under construction.

Mr. Hernandez was always very involved in the community, and he attended community meetings. He had a very good relationship with the public. He was customer service oriented.

Mr. Hernandez led staff to fulfill the vision of the Board. Employees did not have much appetite for moving forward with the downtown development, which included the new City Hall. He took the bull by the horns and made a very detailed PowerPoint presentation showing all the issues that their current City Hall had. He demonstrated how having a vibrant downtown area would benefit the City and residents. He did a nice job leading the project.

Mr. Hearn was not directly involved with the budget and finances, but in the course of their conversations he came to believe that Mr. Hernandez had good financial skills. Mr. Hernandez completed tasks by the deadline given.

Mr. Hernandez had not been involved in anything personally or professionally controversial. He left Fulton County because his family wanted to return to Florida. When an opportunity opened up on Broward County, he embraced it. He moved forward when doing so made sense.

Mr. Hearn would hire Mr. Hernandez and had a positive experience working with him. Mr. Hernandez would be a good City or County Manager. The five Commissioners and City Manager in Coral Springs loved working with Mr. Hernandez.

Words or phrases used to describe Roberto Hernandez:

- Energetic,
- Outgoing,
- Positive,
- Change agent,
- Engaged, and
- Active.

Strengths: Energetic; very much wanted to make decisions; could shepherd a project from A to Z very well.

Weaknesses: People’s greatest strengths are often their greatest weaknesses. Because he moves projects along so well, Mr. Hearn had to slow him down a little and occasionally reminded Mr. Hernandez of a step that needed to be taken in the process.

Prepared by: Danielle Dayton and Lynelle Klein
Colin Baenziger & Associates

CB&A Internet Research

WLRN News HD1 (FL)
February 21, 2020

Fort Lauderdale Officials Respond to \$1.8 Million State Fine for Sewage Spills

Author: *Alexander Gonzalez & Tom Hudson*

Pipes in Fort Lauderdale keep breaking--it's been an almost daily reality for many people living and working in the city. More than 200 million gallons of sewage have spilled from busted pipes in Fort Lauderdale since December. The state responded to the sewer spills this week. The Florida Department of Environmental Protection fined the city almost two million dollars. That amount is based in part on how much sewage has spilled. On the South Florida Roundup, host Tom Hudson talked about the issue with WLRN's Broward County reporter Caitie Switalski and Fort Lauderdale's deputy city manager **Rob Hernandez**.

Here's an excerpt of their conversation: Tom Hudson: What are the funding options if the city has to pay the state this \$1.8 million fine or any fine for that matter?

Rob Hernandez: Well, if we have to pay the fine, it's either going to have to come out of the Water and Sewer fund or the city's general fund. And again, we believe that \$1.8 million will best serve our local residents and our taxpayers by being reinvested into some of these projects rather than just going in and being deposited into a general fund at the state level. We're not being critical of the state. We understand that they were in the position where they felt that they had to take some sort of action. But we're hopeful that we'll be able to work something out that is slightly different than just the fine.

Caitie Switalski: When it comes to the punitive nature of the fine, \$1.4 million of the \$1.8 million is civil penalties based on how much sewage and how many days the sewage spill went on. I know the city is in the middle of weaning off trying to take money out of those funds [general or Water and Sewer funds] to balance the regular budget. That was a practice leftover from the last city administration. But if the city has to pay part of this fine out of those funds again, have you heard from any residents about that?

Hernandez: No, we haven't heard from any residents. And certainly I don't think it's going to change the practice. The city commission has made it abundantly clear that we were going to transition away from transferring funds from the Water and Sewer fund into the general fund. The city commission that's currently in office directed the city manager to transition us over a four-year period. They have since directed us to accelerate that transition. And that's something, going into next fiscal year, that we're certainly looking at. If there's an opportunity to return those funds at midyear this year, that's something that our city manager is looking at. But I don't think that the fine is going to derail us from making progress. And using your word, "weaning" ourselves off of that budget transfer. We're under clear direction that the funds that are generated by the Water and Sewer fund are going to go back into the necessary improvements that need to be made. And certainly we've been working in that direction for the last couple of years and we will continue to do so.

South Florida Sun Sentinel (FL)
July 23, 2019

Fort Lauderdale: Contractor Who Broke Water Main Wasn't Digging Where it told us
Author: *Larry Barszewski*

Fort Lauderdale never warned a contractor that a critical water line lay buried where workers planned to dig last week, a report shows, but city officials say that's because the contractor supplied the wrong address. The misinformation led to a failure that ultimately dried up the city's water supply and led to days of boil-water orders. Taps ran dry hours after the contractor drilled into the water supply line July 17. Countless businesses were forced to close, and more than 200,000 people were left without water to drink or shower. The contractor, Florida Communication Concepts, used a service called Sunshine 811 to find out whether there were underground utilities it had to watch out for while doing work for Florida Power & Light Co. The statewide utility service is authorized under Florida law and is the state's official resource for companies and individuals planning underground work.

The report shows Fort Lauderdale never told the contractor that the site in the back of 2525 NW 55th Court contained a 42-inch pipe that supplied raw water to the main water treatment plant. Instead, the city indicated that it didn't provide service there, according to the report from Sunshine 811. Deputy City Manager **Rob Hernandez** said the city's water line isn't on that property; it's 75 feet north. The digging was being done to the north and east of the requested location, he said. "It appears that where the contractor was digging is not where they indicated on the 811 ticket," **Hernandez** said. "Our investigation is still ongoing." The owner of Florida Communication Concepts, Tim Hicks, said he couldn't comment, and FPL has declined to answer reporters' questions.

Contractors contact Sunshine 811 to alert agencies about the work they plan to do and to find out whether there are pipes or underground facilities they need to avoid when digging. The service then alerts the utilities, which are supposed to inform the contractor whether they have lines in the area and mark them if they do. Florida Communication Concepts filed a ticket with Sunshine 811 on June 25 to install conduit in July for FPL near Fort Lauderdale Executive Airport, records show. Sunshine 811 notified Fort Lauderdale and nine other entities, based on maps they submitted to Sunshine 811 that indicated it was possible they could have equipment near the work site. Tamarac and Crown Castle Fiber responded that they had no facilities there. Oakland Park, Teco People's Gas of South Florida and CenturyLink said their lines were outside of the work site.

Others said they did have equipment in the area. Fort Lauderdale Executive Airport, Comcast Cable, AT&T and FPL indicated that they marked the locations of their lines for the contractor. Fort Lauderdale responded as well, but it used a code indicating that no city utilities were present at that excavation site. The code it used said "another company provides the services at this location." That code typically is used by utilities that do not have services at that exact location, according to Sunshine 811's online site. **Hernandez** said that's because the city doesn't have any water lines at the property address the contractor listed. He also said Florida Communication

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(Articles are in reverse chronological order)

Concepts said on its Sunshine 811 form that it would not be doing boring, but that's how the city's pipe was pierced. Fort Lauderdale receives dozens of requests each day from Sunshine 811 for underground line information. Sunshine 811 sent the city 20,501 notices last year and 12,635 so far this year, the service reported. The requests go to the city's distribution and collections chief for its water and wastewater services. A city police report filed at the time the line was punctured said the company had used the line-locating service. However, it cited Florida Communication Concepts for not having a permit for the work, violating city codes. It issued the contractor a "Notice to Appear" citation. City officials said a date has not been set for a hearing. It's not clear whether a permit was needed. **Hernandez** said last week that FPL has a franchise agreement with the city that does not require the utility to get a permit every time it digs.

Post Gazette (PA)
July 19, 2019

Fort Lauderdale gets 'Temporary Relief' While Crews Repair a Water Main Break

Author: *Dakin Andone & Emanuella Grinberg*

Officials in Fort Lauderdale, Florida, said a temporary fix water has running again after a main break left an estimated 220,000 customers without service Thursday. Water is flowing below normal pressure and is expected to return to "near normal" sometime Thursday night, Mayor Dean Trantalis said in an evening news conference. A subcontractor repairing electric lines on Wednesday struck a pipe that supplies water to a treatment plant, cutting off the city's water supply. No major incidents were reported as a result of the outage, the mayor said. A partial patch was placed on the hole, increasing water pressure, Mr. Trantalis said. Those involved in the repairs are "confident" that the patch will provide "temporary relief" while crews work to redirect the water flow through a backup line and replace the broken pipe, he said.

The installation could take through the weekend, Mr. Trantalis said. While repairs are underway, a boil water advisory is in effect until and water distribution sites will stay open until at least Saturday, Mr. Trantalis said. With repairs underway, he said the city's focus will shift to investigating the cause and seeking compensation for not only the city but hotels, restaurants and other businesses impacted by the service outage. "This was not just a minor incident, this impacted many hundreds of thousands of hundreds of people," Mr. Trantalis said. "It was clearly haphazard," he said. "It's clearly something that we're going to seek retribution for."

What the city is doing to fix the pipe

On Wednesday, a subcontractor working near the city's Executive Airport for Florida Power & Light damaged a 42-inch city pipe that supplies water from wellfields to the Fiveash Water Treatment Plant, the mayor said. The service outage impacted the city and surrounding municipalities that receive water through the city, including Lauderdale-by-the-Sea, Oakland Park, Wilton Manors and sections of Davie and Tamarac. An estimated 220,000 customers were impacted, Deputy City Manager **Rob Hernandez**. Crews are now building a concrete bunker around the broken pipe to seal the break and protect the pipe, Mr. Trantalis said. The bunker should be completed by 10 p.m. ET and the Fiveash Water Treatment Plant should be back to full and normal operation, he said. The temporary fix will give crews time to redirect the water flow through a backup line, Mr. Trantalis said. Once the backup line is in place, a replacement pipe for the primary main will be installed, likely over the course of the weekend, the mayor said.

Cause of outage under investigation

Earlier Thursday, Mr. Trantalis said crews responded immediately, but as they were working, the damaged pipe collapsed, forcing the city to turn off the water flow. During Thursday night's news conference, he suggested the subcontractor bore the brunt of the blame for "something they should not have done." The subcontractor has been cited and an enforcement action has been launched, the mayor said, although he was unable to identify the specific citation. When initially asked if there was anything the city could have done better, the mayor responded "no," then

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(Articles are in reverse chronological order)

added, "Yes -- we could have foreseen this but you can't foresee these types of things." Later in the press conference, the mayor maintained the incident an "accident" caused by "human error," but he also acknowledged that it put a spotlight on the city's redundancy systems.

Deputy City Manager **Rob Hernandez** said "difficulty" with at least one valve that was supposed to redirect water to the redundant system, leaving them unable to isolate the damaged section of pipe. "What [this] pointed out to us is that we need to pay more attention to our infrastructure needs and that we need to go back and make sure that these redundancies systems do work when they're supposed to work." Residents in need of bottled water can find it at the Beach Community Center on 33rd Avenue, Mills Pond Park on Northwest 9th Avenue and Riverland Park on Southwest 27th Avenue.

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SavannahNow

Posted May 26, 2019 at 8:18 PM Updated May 27, 2019 at 12:29 AM

Savannah's city manager out on medical leave

By DeAnn Komanecky and Eric Curl

Savannah City Manager **Rob Hernandez** is out on medical leave, with Patrick Monahan now serving as acting city manager. **Hernandez** tendered his resignation on April 12 with a last work day date of June 30. Whether **Hernandez**'s medical leave will change when he leaves his post is not known. City spokesperson Ken Slats said no other details are currently available. Monahan, a former Chatham County assistant manager, was hired in April as a consultant to work with **Hernandez**, starting in May. Monahan retired from the county in 2013 and has said he would only take the interim position temporarily, but is willing to stay long enough after this fall's election for the new city council to hire the long-term manager next year. He will be paid \$20,000 a month for up to 12 months, under the agreement.

Hernandez's resignation came after news broke of his pending departure for a job as deputy city manager of Fort Lauderdale, Florida. **Hernandez** declined interview requests regarding his resignation, but said in a subsequent press release that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. He indicated there was more to the decision than just family reasons, however, in correspondence obtained by the Savannah Morning News. **Hernandez** said he intended to stay away from city manager positions for a while after being asked about his plans by Lake Wales, Florida, City Manager Kenneth Fields. "The last three years here have been tough as a (city manager)," **Hernandez** said. He responded in a similar manner to an April 12 email from Chatham County Engineer Leon Davenport. "Tough town," **Hernandez** said. "Going back to Fort Lauderdale."

The city council hired **Hernandez** as city manager Sept. 1, 2016, with a \$238,000 salary and \$600 monthly vehicle allowance, as well as a \$7,000 annual 457 retirement plan. After his arrival, **Hernandez** led the city through a major restructuring and successful development of a strategic plan. The city has also experienced two years of budget surpluses after **Hernandez** had implemented a hiring freeze and budget cuts. His impact was praised by some of his executive team following word of his departure.

City Management Coordinator Joe Shearouse Jr. wrote in response to his resignation notice that he thought a lot about the accomplishments **Hernandez** had made in Savannah. "Your impact on people is extensive and much more influential than a project or initiative," Shearouse said. "Your openness and eagerness to provide us opportunities to grow and learn is lasting and far reaching." Special Projects Coordinator Daphne Williams said in an email that it may be a long time before they get someone else comparable. "Our team was on fire," Williams said.

Hernandez also experienced his share of criticism, which began shortly after his arrival when he proposed cuts, which were ultimately restored, to arts organizations and social programs. And he was widely panned by residents following the implementation of a fee for fire service. **Hernandez** had touted as a way to get all property owners — including those that are tax-exempt

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— to contribute to the rising costs of providing fire protection. Public indignation only grew when **Hernandez** presented the council with a spending plan for a budget surplus from 2017 of more than \$10 million about five months after the fee was adopted. The fee was ultimately repealed, but **Hernandez** later attributed some subsequent job searches to the widespread opposition he encountered following its implementation.

Savannah Morning News (GA)
April 29, 2019

Savannah Could Get More Affordable Housing Under These Proposed City Programs

Author: *Eric Curl*

About 44 percent of Savannah families cannot afford quality housing, according to city officials. In other words, almost 24,000 local households are cost burdened because they spend 30 percent or more of their income on housing, said Housing and Neighborhood Services Director Martin Fretty. To address the issue, the city is considering some new affordable housing initiatives that were presented to the Savannah City Council during a workshop Thursday. The initiatives include a \$20 million investment to acquire, redevelop and sell 1,000 blighted properties over a 10-year period. The investment would provide more affordable housing, while also reducing the number of abandoned properties that cost the city an average about \$1,300 a year each in lost tax revenue and expenses related to police, fire and code enforcement services, Fretty said. The city is hoping to get \$10 million for the acquisition program included on the Special Purpose Local Option Sales Tax referendum going before voters this fall. The eventual sale of the properties would go back into a revolving fund and help drive down costs for future investments, Fretty said. "After a couple of years you ought to be able to recover, we think, 80 percent of what we invested in the properties to acquire them," he said. The city is expected to meet with Chatham County officials next month to discuss the SPLOST project list and determine Savannah's distribution share of the sales-tax revenue. Savannah affordable housing presentation by savannahnow.com on Scribd. Inclusionary zoning. The city is also contemplating the implementation of an inclusionary zoning policy, similar to one established in Atlanta last year. The policy would require developers of apartment projects to include a certain percentage of affordable units or pay a one-time fee into a city housing fund. In turn, the developer could select from a list of incentives that could allow for more units, reduced parking requirements and a streamlined permitting process. In Atlanta the program applies to areas where the city is experiencing the pressures of redevelopment, said Bridget Lidy, Savannah's director of planning and urban design. In Savannah, the Canal District, where the new arena is being built west of downtown, provides an opportunity for the program's launch, Lidy said. "It's ripe for this," she said. The proposal received general support from the council, although it is still early in the process. Lidy was encouraged to set up a meeting with Atlanta officials, who she said have expressed interest in helping Savannah establish their own initiative.

And City Manager **Rob Hernandez** said he thought the city would likely need to hire an outside consultant before they could develop an inclusionary zoning policy. "I think we need to bring in the resources from other communities that have gone through that process," **Hernandez** said. "We haven't and there is a lot of stakeholder involvement and a lot of legalities involved." In the meantime, the city has developed some proposed standards to reduce development costs and increase the amount of affordable housing, including the reduction of the minimum lot size and parking requirements in traditional neighborhoods. In addition, the city's proposed new zoning ordinance, NewZo, provides more flexibility for constructing accessory dwelling units, with no more than one bedroom, in some areas. City officials are planning for the new ordinance to be adopted in July after public hearings are held in June.

Savannah Morning News (GA)
April 13, 2019

Hernandez Formally Resigns Post

Author: *Savannah Morning News*

Savannah City Manager **Rob Hernandez** formally submitted his resignation letter Friday morning. "Such letters are never easy to write and I hope it conveys my appreciation to all of you and our great staff, especially those that sit around the table with me each Monday," **Hernandez** wrote in an email to the city council and city staff. "I know that I've made some mistakes along the way as I am far from perfect. Please know that I have always attempted to do what is in the best interest of the city in the long term, and endeavored to create a culture of fairness, professionalism, integrity, inclusion, diversity, opportunity and ingenuity. I'm fortunate to have been surrounded by a team of good people. I'm grateful to have known you. Together, we've gotten a lot done since October 11, 2016. I hope that I have served all of you well," he wrote. "Thank you for the opportunity to serve as your city manager."

Fort Lauderdale City Manager Chris Lagerbloom informed the Savannah Morning News on Thursday that **Hernandez** will be joining the city as deputy city manager later this summer. In a formal resignation letter addressed to the mayor and alderman, **Hernandez** touted the team's accomplishments, from upgrading the city's bond rating to launching the design of the new arena. "I have been honored with the privilege of serving as Savannah's eighth city manager since adoption of the council-manager form of government in 1951. I joined the City on the heels of Hurricane Matthew on October 11, 2016, and since then we've weathered literal and figurative storms and overcame numerous obstacles in providing exceptional municipal services," **Hernandez** wrote. "We accomplished much during this time while simultaneously creating an organizational spirit focused on one simple concept: Forward. Forward is a fanatical passion for momentum, progress and achievement. It is an obsession with what is possible rather than the status quo. It is the driver behind our biggest accomplishment - SAVANNAH FORWARD, our guide to strategic policy-making and investments through 2025."

Hernandez said in a press statement issued later that he and his wife decided to go back to south Florida to help their siblings care for their elderly mothers. His resignation is effective June 30. Savannah Mayor Eddie DeLoach has recommended that former assistant Chatham County Manager Pat Monahan serve as interim city manager, but he is awaiting support for that decision from the rest of the city council. A special meeting has been called for 6 p.m. Monday in the Media Room on the second floor of City Hall for the council to consider an interim city manager. The next city manager is not expected to be hired until after the new city council is sworn in next year following this fall's election.

Savannah Morning News (GA)
January 9, 2019

Savannah City Manager Rob Hernandez: Government Leadership Backs Savannah Fire Department

Author: ***Rob Hernandez***

There has been much discussion in recent days about staffing levels within Savannah's Fire Department. I would like to take this opportunity to address misinformation circulating in social and regular media outlets.

First, what the city government has not done:

- We have not closed any fire stations.
- We have not laid off any fire personnel.
- We have not left any neighborhood in Savannah unprotected.
- We have not taken steps that will delay Savannah Fire's response time to an emergency.

What we have done is eliminate vacant positions in Savannah Fire over the past two years. To put those reductions in context, I would like to take you back to 2014. For the first time that year, Savannah Fire was granted an ISO Class 1 rating — an insurance classification that evaluates a community's fire operations and water infrastructure. Less than 1 percent of fire departments in the nation are rated Class 1. The following year, in 2015, Savannah received a three-year, \$3.5 million FEMA grant designed to increase staffing levels in Savannah Fire. We did just that. In 2015, we added 15 firefighter positions. In 2016, we added another 15 firefighter positions. And in 2017, we grew by 10 more firefighter positions. Add it all up and over a three-year period we added 40 new firefighters to our payroll — a 12.6 percent staffing increase. At 366 total positions, including 341 firefighters, this was the highest staffing level in Savannah Fire's history.

That grant ended in 2017, and with it we faced a difficult decision: Do we ask Savannah taxpayers to continue funding this increased staffing level, or do we make reductions? We were facing flat revenues that year, and direction from city council to continue making investments in the police department. To balance the 2018 budget, we eliminated 45 vacant positions across the city government organization, including 18 within Savannah Fire. Council directed that those cuts come from Engine 16/Marine 1 — a specialized unit that operates the fire boat and a backup pumper truck at fire department headquarters on Oglethorpe Avenue. That same budget authorized a permanent funding solution for fire operations: the fire fee. That fee was rejected over the summer, and during months of public discussion we heard repeatedly from property owners that they preferred a smaller fire department over paying a new fee to fund fire services.

We contracted with the University of Georgia Carl Vinson Institute of Government to analyze Savannah Fire operations and make recommendations on better use of resources. I expect those recommendations within the month, but preliminary discussions with the report authors identified options for increased efficiency and reducing costs. The 2019 budget was balanced with the elimination of another 15 vacant positions. The UGA recommendations will drive where

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those reductions are made. It is important to note that even with the elimination of these 33 vacancies over the past two years, Savannah still has seven more firefighter positions today than we did in 2014, when we received our ISO-1 rating. And we are still well-staffed compared with communities our size; Charleston, for instance, has one fewer firefighter position than Savannah, and 24 percent more territory to cover.

As a resident or business owner in this city, you are served not just by the fire station located in your neighborhood, but a fire protection system consisting of 15 stations and 22 emergency response vehicles. The city government also maintains agreements with our adjacent cities, which provide us access to more than 20 other fire stations, firefighters, and equipment should they be needed in the unlikely event all of our resources are unavailable. No area of the city will ever be left without a response to a fire. We are fortunate to have one of the best fire departments in the nation. Savannah Fire will continue to be, even with these adjustments.

Rob Hernandez is Savannah's city government manager.

WTOC 11

April 9, 2019 at 11:21 PM EDT - Updated April 11 at 10:36 AM

City of Fort Lauderdale extends offer to Savannah city manager

By Sean Evans

SAVANNAH, GA (WTOC) - Several sources have confirmed that Savannah City Manager **Rob Hernandez** is leaving his job. "The city is losing a very smart and talented individual," Savannah Alderman John Hall said. "I wish Mr. **Hernandez** the best wherever he goes. Our loss is another city's gain." **Hernandez** said that he has not officially tendered his resignation or discussed this with all of city council as a group. He said he will not release a statement until he felt it was the appropriate time. We've reached out to the mayor's office and the city spokesperson for comment.

Hernandez came to Savannah from Broward County, FL in 2016. "He inherited a virtual mess. Remember, he came in in the middle of a hurricane. The first hurricane we'd had in what, 27 years," said District 4 Alderman, Julian Miller. In addition to dealing with the aftermath of Hurricane Matthew, **Hernandez** was tasked with completing a budget and coming up with a blueprint that would carry Savannah years into the future. "He has come up with the city's first strategic plan and gotten it going. He has refined our logo so we have the same logo everywhere. There's an awful lot he has done, most of which the public will never see," Alderman Miller said. Several things spear-headed by **Hernandez** have been very public, like re-establishing a Savannah Police Department after the de-merger with the county, the search for a new police chief, and the fire fee proposal.

Less than a year after the fire fee proposal was dropped by city council after public backlash, **Hernandez** referenced it in a moment of levity during his speech at a firefighter award ceremony Wednesday afternoon. "Believe it or not, the city actually imposed a fire fee way back in the early 1800's to provide fire protection services to all property owners of the city. I wish I would've known that a year-and-a-half ago. That could have helped us sell what we were trying to do a little easier to those that were opposed to what we were trying to do," he said.

If **Hernandez** is in fact out the door like sources tell us, city leaders know they need a similar leader to take the helm. "When you run a city, there are so many moving wheels and so many gears going in different directions. There's always going to be hundreds of things that have to be addressed. That's why it's going to take someone who really knows what they're doing to pick up the mantle and go forward," Miller said.

Hernandez's previous attempts to change jobs have been publicized. In August of 2018, it was announced that **Hernandez** did not get a county administrator position in Pinellas County, FL. The city of Savannah confirmed he was a finalist for the position. **Hernandez** was also on the shortlist for a city manager position in Brownsville, TX. At the time, **Hernandez** said he wasn't sure if the Savannah community wanted to work with him. "Criticism of government is healthy and important, and comes with the territory," he said in a statement in August of 2018. "I don't take it personally, even if some of the attacks on me have been very personal. What I do want is

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to work in a community that wants to work with me. I am not sure that is currently the case. Amid a sustained level of criticism and uncertainty, I have considered opportunities outside Savannah. While I have no desire to leave, I did feel it was a prudent move for me and my family.” **Hernandez** was a key architect of a proposed fire fee in Savannah that drew the ire of many in the city. The city council withdrew the fee from consideration after a tortured fine-tuning process. The mayor proposed to halve the fee weeks before it was withdrawn.

Chaz Adams with the city’s strategic communications office says **Hernandez** has received an offer as Deputy City Manager for the City of Fort Lauderdale Florida. “The City of Fort Lauderdale has extended an offer to Roberto “Rob” **Hernandez** for the position of Deputy City Manager. The offer is contingent upon approval from the Fort Lauderdale City Commission. The commission plans to consider the item at their next meeting, which will take place on Tuesday, April 16,” Adams said. City council will hold its regularly scheduled meeting on Thursday. We’ll be following this closely to see if anything is announced regarding a resignation, as well as what’s next if the Savannah city manager position becomes vacant.

Savannah Morning News (GA)
December 20, 2018

Savannah City Council Oks \$1M Fire Station Sale Despite Buyer's History of Code Violations

Author: *Eric Curl*

The Savannah City Council on Thursday approved the sale of a former fire station, despite the buyer's history of being cited for code and maintenance violations at multiple properties throughout downtown. The \$1.05 million sale to Inman Park Properties came after three proposals were submitted to the city and evaluated by a five-person staff committee. Inman received the highest score after proposing to preserve and restore the 72-year-old building at 6 W. Henry St. for use as a cafe and office space. Rajesh Patel had proposed paying \$525,000 for the property, while Lynch Associates Architects offered \$455,000. The sale was quickly approved without discussion by the city council, with the exception of Alderman Bill Durrence, who had stepped out of the chambers to speak with someone who was leaving.

Durrence, who represents the area where the building is located, said he probably would have voted for the sale also. It was his understanding that most of the property maintenance issues have been addressed and he was hoping to see something done with the building, Durrence said. "The bottom line for me is that it didn't matter how I voted because the majority of council made up their mind that for that price point, they were going to sell it," he said. Inman's proposal is expected to activate the "somewhat stagnant" block and generate 75 full-time jobs in the neighborhood, according to the developer's proposal. Inman reported that construction was expected to begin 120 days after closing and take one year to complete.

Staff had delayed consideration of the sale in October following inquiries from the Savannah Morning News into the buyer's past code and property maintenance issues. From 2012 through 2016, the city instigated 16 Chatham County Recorder's Court cases against Inman's owner, Jeff Notrica, for 14 downtown properties. Charges related to overgrown vegetation, maintaining a clean and sanitary property, safety, defacement of property, accumulation of garbage, and an unsafe building. The pending sale comes after the approved sale this year of multiple downtown city properties. City Manager **Rob Hernandez** has touted the sales as a way to return outdated properties to the tax rolls and raise revenue for the construction of a new municipal center west of the Historic District, where the city is building a new arena.

However, **Hernandez** said during an interview Tuesday that the sales revenue may instead go toward construction of the arena. The amount of current voter-approved Special Purpose Local Option Sales Tax is expected to raise \$120 million, while about \$22 million was raised during previous tax periods. Still, the city expects to need an additional \$20 million to \$40 million to cover the estimated \$140 million to \$160 million costs of the arena's construction, as well as relocating public works from the arena site and building a new complex for that department, **Hernandez** said. The city does not plan on adding the arena to the next SPLOST referendum going before voters this fall, he said.

Savannah Morning News (GA)
November 16, 2018

Savannah Proposing Slight Property Tax Cut, Employee Wage Hike

Author: *Eric Curl*

The owner of a home valued at \$100,000 will save about \$8 a year under a proposal to reduce the property tax rate in 2019, according to city estimates. The reduction from 13.40 mills to 13.20 mills was requested by the Savannah City Council on Friday, the second day of a two-day budget retreat, after staff had initially proposed retaining the existing rate. Alderman Brian Foster advocated for the reduction to provide some relief to taxpayers after the rate was increased from 12.48 mills this year following the elimination of the widely opposed fire fee. "It's a start," Foster said. The council also directed staff to incorporate a 3.5 percent wage increase for employees next year. The proposed increase was agreed to as a compromise after Alderman Van Johnson had initially sought to bump staff's recommended 3 percent wage increase to 4 percent. "The fight for the best and the brightest is real and people ultimately go where they will be paid," Johnson said.

To maintain a balanced budget, while accommodating the council's wishes, staff said they increased their "conservative" projections for property tax revenue growth next year from 3 percent to 4 percent. In addition, staff plans to cut another \$1 million from the proposed budget to cover the remaining costs, said City Manager **Rob Hernandez**. The 2019 budget is expected to be presented to the city council for adoption next month. Since **Hernandez** arrived in late 2016, he has touted the need to address what he described as a structural imbalance resulting from expenses exceeding revenue. The fire fee adopted this year was an attempt to address that imbalance, but the council voted to repeal that new revenue source after facing widespread opposition from property owners.

Hernandez said he believes the city has made progress, but noted the concerns raised by the council during the retreat that funding was lacking for infrastructure and service improvements. "We're still imbalanced in that this budget is not able to adequately address those needs," he said. "We are addressing them, but the need really outstrips our ability to fund them." The next Special Purpose Local Option Sales Tax, which goes before voters next fall, has been touted by the council and staff as a way to fund needed infrastructure improvements, but **Hernandez** said the city cannot rely on the tax to resolve the issue. The city will also be looking at more models to fund municipal services, including a potential stormwater fee to cover the cost of drainage projects, **Hernandez** said. In July 2017, the city council unanimously approved a \$49,651 contract with Atlanta-based Stantec Consulting Services to study the feasibility of such a fee and how it would be implemented, but the study's findings have never been presented. "We continue to look at that and we will be bringing that back to City Council at the appropriate time," **Hernandez** said.

Savannah Morning News (GA)
August 31, 2018

\$3.9M Mistake Mucks Up Arena Contract

Author: *Eric Curl*

The Savannah City Council on Thursday delayed by two weeks consideration of an \$11.2 million contract with AECOM Hunt to manage the construction of the new \$140 million arena, after learning the contract amount is actually about \$3.9 million more than city staff had initially reported. The vote for the delay came after staff explained during the morning workshop that a misreading of the fee proposal had led staff to initially report that the contract was \$7.3 million - the amount that was on the meeting agenda until Wednesday. The originally reported amount should have been a red flag since it was so much lower than the amounts submitted by the other two finalists for the contract, said Alderman Bill Durrence. Turner Construction had proposed serving as construction manager at a cost of about \$13.6 million, while JE Dunn's proposed cost amounted to almost \$12.7 million. "I'm very nervous," Durrence said. "I never spent \$140 million before." Pete Shonka, executive director of arena development, said that AECOM Hunt still had the lowest price and highest evaluation score after the error was corrected.

City Manager **Rob Hernandez** also said he felt confident in moving forward with the recommended contractor after determining the company had followed the process correctly, while acknowledging the error should not have occurred in the first place. "That reflects poorly on me and I apologize," **Hernandez** said. "We will double down to prevent circumstances like this in the future." Council members said they wanted more time to see how the error occurred before taking a vote. "The severity of it should not be lost," said Alderman Julian Miller. "We are going to be doing an awful lot of contracts and we need to have confidence on that." Walter Murphy, vice president at JE Dunn, had also spoken out against the contract being awarded to AECOM during the meeting and had informed the council that he had notified the city manager of the issue. "We were told it was a scrivener's error," Murphy said "I don't think so. I think the bid was non-responsive."

In other council news, city council approved the \$14 million sale of two downtown buildings. Mayor Eddie DeLoach joined Aldermen Carol Bell, Durrence, Brian Foster, John Hall and Miller in approving the sale of the historic Gamble Building next to City Hall for \$8.5 million, while Aldermen Van Johnson, Estella Shabazz and Tony Thomas cast the opposing votes. The buyer, Foram Development, plans to convert the building into a condo complex with rooftop gardens. Staff had recommended the sale as a way to rid itself of a building that requires extensive repairs and generate ongoing revenue by putting it back on the tax rolls. But Thomas said he disagreed with staff's assertion that the historic building was not adequate for city use. "I'm a little bit more of a sentimentalist," he said. "I believe the city is giving up its imprint on the riverfront."

The vote was similarly split with the council's approval of the sale of the former Catholic Diocese building at East Broad and Liberty streets for \$5.9 million to Standard Companies, which plans to develop the property as an apartment complex with commercial space. Johnson

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said he was afraid residents were being priced out of living in the city. "This was in my mind a wonderful opportunity to provide affordable and workforce housing for people to live downtown," he said. The approved sales come two weeks after the city council's vote to sell the Broughton Municipal Building to Columbia Ventures for \$4.5 million. The buyer intends to convert the mid-century building into a hotel with retail on the ground level. And in April 2017 the council approved the \$5 million sale of a 1.2 acre lot on Oglethorpe Avenue, where a developer plans to construct a mixed-use residential complex.

Hernandez said the funding from the sales is being invested into a reserve account for a modern municipal center he is considering building west of downtown near the arena to consolidate city departments. The total costs of that project, which would include a public safety complex, have not been determined, **Hernandez** said. "We still have a lot of work to do on that," he said. "We still have to flesh that concept out with city council." In the meantime, the city has been relocating staff into 36,538 square feet of leased office space on Chatham Parkway at an annual cost of about \$785,000.

Savannah Morning News (GA)
July 11, 2018

City: Funding Problems not Over
Savannah May be Facing Tough Budget Process for 2019, Hernandez Warns
Author: *Eric Curl*

The recent repeal of the controversial fire fee may have been welcomed by property owners concerned about the additional expense, but city officials are not breathing easy as they look toward Savannah's financial future. With the elimination of the dedicated fee, which would have freed up millions in general funds, the city may be facing a difficult budget process for 2019, according to City Manager **Rob Hernandez**. **Hernandez** warned the Savannah City Council last week that their plan to increase the property tax rate by 0.92 mills, or 7.4 percent, will not resolve long-standing financial challenges that the fee was meant to help address. Almost a third of city parcels pay little or no property taxes due to being exempt or having low value, and tax digest growth has not kept pace with expenses, **Hernandez** said. "I don't want anyone leaving here today with a rosy picture of 2019's budget process," he said. "We are structurally imbalanced."

The mayor and aldermen are expected to adopt the tax increase on July 19 to restore almost \$10 million of the \$16.5 million in revenue lost with the elimination of the fire fee. The city also implemented a hiring freeze and cut expenses, including \$1 million Mayor Eddie DeLoach had sought for an early childhood learning center being planned by the Savannah-Chatham School Board. With the proposed tax increase, the city will be able to preserve funding for some priorities that included software upgrades, enhanced right of way maintenance, Waters Avenue streetscape improvements, increased city reserves, and the Savannah Shines neighborhood revitalization initiative that has already begun in Edgemere/Sackville, said Alderman Julian Miller. "I'm not sure if everyone understands how deplorable the city's computer system is," Miller said. "We're still running programs that most people have abandoned 20 years ago."

Alderman Brian Foster said the city will also maintain the full staffing levels of the police department after adding more than 120 officers to patrol the city following the department's split with Chatham County in February. "We are fully staffed and have been for a while in the first time in over a decade," Foster said. "That's what the public asked for and we have successfully done that." Savannah's property tax rate has been decreased or remained the same every year since 1994, aside from a six-month half-mill increase in 2010 that was dropped back to the previous rate the following year. The current rate of 12.48 mills has been in place since 2013. For the owner of a home with a fair market value of \$150,000, the proposed increase amounts to \$55.20 annually or \$4.60 per month.

Alderman Tony Thomas said that every effort would be made to reduce the rate in 2019, but **Hernandez** responded by casting doubt on that scenario. "I don't know at this point in time because it's still too early in the process for FY19 to determine, in fact, whether we are going to have a smooth budget process or we're going to have a rocky budget process like we've had the last couple years," **Hernandez** said. "So please do not leave here today thinking that budget

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process for FY19 is going to be a smooth one because I can't guarantee that." Savannah Alderman Van Johnson suggested that the city meet with residents before the budgeting process begins to reconcile what they want and what the city can afford. "We have a region that takes advantage of many of the services that we provide that they do not pay for," Johnson said. "So I think part of this discussion is educating individuals that we can give everybody what they want, but there is a cost to it." **Hernandez** said that the city's budget director, Melissa Carter, has already proposed holding several citizen engagement panels to walk residents through the budget process, "allowing them to see how difficult it is to put together a \$400 million budget for an enterprise the size of the city of Savannah." The council will hold two additional hearings at 9:45 a.m. and 2 p.m. July 19 before making a final vote on the tax rate increase.

Savannah Morning News (GA)
June 8, 2018

City to Consider \$11M in Cuts
Council Approves Adding Sunday 'Brunch Bill' to November Ballot
Author: *Eric Curl*

With less than six months left to go, City Manager **Rob Hernandez** has been charged with cutting more than \$11 million from this year's budget. On Thursday, the Savannah City Council directed **Hernandez** to figure out over the next week what cuts can be made to make up for the anticipated loss in revenue, as the mayor and aldermen prepare to reduce the controversial fire fee by more than half in the face of widespread opposition. "We're just asking the city manager to go back and modify the numbers and bring us something forward that people can feel better about," said Mayor Eddie DeLoach. As proposed by the council, a property tax increase is not an option and the city would retain the one mill tax rate decrease that was approved in conjunction with the fire fee as part of the 2018 budget. The council's vote came after DeLoach announced on Wednesday a proposal to reduce the fee by 53 percent, which would bring the fee to \$120 for residential properties. The city is also offering discounts of up to 20 percent until June 15, which would bring the total to \$96. Mayor Pro Tem Carol Bell also suggested that **Hernandez** present an alternative option to cover the costs of eliminating the fire fee entirely. "As a council, let us determine if that's the way we want to go," Bell said. Previous attempts last month by Aldermen Van Johnson, Estella Shabazz and Tony Thomas to repeal or lower the fee were voted down by the remaining members of the city council during deliberations on how to spend \$10 million surplus from last year. On Thursday, Thomas said he was staunchly opposed to the fire fee, but was concerned the council was being unfair to **Hernandez** by not making the \$11 million reduction request when the surplus was presented. "I don't know if the city manager has truly analyzed that plan to see if he could reach that number," Thomas said. "And I don't know either what other options are completely out there." The surplus spending plan, which left the full fire fee intact, included funding to pay off the purchase of the Coastal Empire Fair site; complete the Cultural Arts Center; install computer security upgrades following a malware attack; fund a staff compensation study; and assist the Savannah-Chatham School Board in establishing an early learning center touted by DeLoach as an anti-poverty initiative.

Hernandez said Thursday he did not recommend using the surplus funds to make up fire fee cuts because the savings and unexpected revenue from 2017 were going toward one-time expenses and that the fire fee was meant to free up general funds for ongoing operational costs. "It would come back to bite us at some point in the future," he said. The proposed budget cuts are expected to be presented for the council's consideration during a budget workshop June 18. The tax rate has to be formally adopted by the end of the month and the council is expected to vote on the revised budget at their meeting June 21. Prior to the regular meeting, the council got a briefing on a hardship program the city is developing for low-income property owners who are unable to afford the fee. The city is now seeking a nonprofit social service provider to administer the program so applicants can also have an opportunity to get assistance with additional needs, said Tafanye Young, Chief Community Services Officer. "We're hoping that people will take advantage of this and see rewards beyond just the fire fee being waived," Young said.

Savannah Morning News (GA)
April 12, 2018

The Sense in the City's Spare Cents

Author: *Eric Curl*

Savannah had a better year, financially, than expected, according to city officials. Now, the city is planning on providing \$2 million in funding needed to complete the new Cultural Arts Center, paying for security upgrades following a recent computer malware attack, and covering the full costs of a 3-percent performance-based pay increases for employees, after recently closing out the 2017 budget with a \$10 million surplus. The surplus stemmed from a combination of about \$5.2 million in revenue coming in higher than anticipated, in addition to expenses coming in about \$4.7 million below budgeted amounts after the city implemented a hiring freeze last year, said City Manager **Rob Hernandez**.

Most of the growth was from elastic revenues, such as lodging and sales taxes, that expand and contract with strength of economy, **Hernandez** said. "We have a general idea how the economy is going to perform but it's a guess and science at the same time," he said. "So in 2018 our budgeting numbers are a bit more optimistic than they were when we put together the '17 budget, but something could happen tomorrow." The funding plan going before the Savannah City Council Thursday will also increase reserve funds, pay a debt owed for purchasing the Coastal Empire Fairgrounds site, and cover costs associated with converting a section of Montgomery Street for two-way traffic. In addition, staff is recommending that the revenue go towards staff relocation costs related to the planned sale of two downtown buildings and a compensation study to address pay inequities.

"We also did a reorganization this year and created new job titles," **Hernandez** said. "We think we slotted them in the right place, but it's time that we do a real in-depth review of our pay and compensation practices." Almost 100 positions were eliminated as part of the reorganization, with about 40 of them vacant, but dozens of new positions were added and impacted employees were given the opportunity to apply for the jobs. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position.

Hernandez said the surplus does not negate the need for the city's new fire services fee, which was implemented to correct a structural imbalance the city has faced for years. "If we didn't have the hiring freeze and agencies spent every dime we got budgeted, we would have only \$5.2 million in extra revenue," he said. "The fire fee provides us an opportunity to take \$21 million of pressure off of the general fund." The city council recently approved an ordinance that offers up to a 20 percent discount on the fee for installing safety equipment, developing emergency plans and participating in fire training programs. Property have between April 15 and June 1 to apply for the reduction before bills are sent out in the fall.

Meanwhile, the city also plans to spend about \$500,000 on new technology and services to boost

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security measures after a malware attack discovered in February impacted some city services. The malware appears to have been eliminated, but the city is still not accepting email attachments as a precaution, said city spokesperson Michelle Gavin. "We think that we've gotten it," Gavin said. "We've taken all the measures to wipe computers and have taken some extreme measures, but it's an ongoing thing."

Proposed surplus expenditures

Transfer to Reserves/General Fund Balance: \$2.5 million

Performance-based 1-percent employee pay increase: \$600,000

Cultural Arts Center Overrun: \$2 million

Montgomery Street redirection project: \$1 million

MPO agreement amendment: \$200,000

Revenue dept. relocation: \$500,000

Fairgrounds - Pay off Debt Service: \$1.4 million

IT/Malware Equipment Recovery: \$500,000

Relocation Contingency: \$100,000

Compensation study: \$300,000

Facility repairs and improvements: \$800,000

Rental of backhoe - Cemeteries: \$100,000

Total: \$10 million

Savannah Morning News (GA)
February 18, 2018

Savannah Restructures Government Operations
Officials Tout Plan as Way to Make City Operations More Efficient
Author: *Eric Curl*

New titles and responsibilities, along with salary increases in some cases, have been issued to a number of Savannah's department heads and top administrators as part of a government reorganization implemented by City Manager **Rob Hernandez**. Touted as a way to make city operations more efficient and achieve the Savannah City Council's priorities in a recently adopted strategic plan, new departments and positions have also been created, while others have been eliminated or modified. The restructuring consolidates two assistant city manager positions, one deputy to the assistant city manager position and five bureau chief positions into three executive officers. The employees selected for the new positions have the experience and personality to lead and get things done, **Hernandez** said. "That's what differentiates managers from leaders," he said. "I need leaders more than I need managers."

Paying for quality

Marty Johnston, formerly a deputy assistant to the city manager, was selected to fill the chief operating officer position, charged with asset management, customer service, special events coordination and oversight of the financial and internal service functions of the city. The move bumps her salary up from \$125,827 to \$148,000. Heath Lloyd was selected as Chief Infrastructure and Development Officer, after previously working as the public works and water resources operations director. Lloyd's responsibilities include ensuring the safety of the city's infrastructure, producing safe drinking water, protecting buildings and streets from flooding, and improving the development process. Lloyd's new salary amounts to \$148,000, up from his previous salary of \$109,414. Taffanye Young was hired as the city's Chief Community Services Officer after previously serving as the Community and Economic Development Bureau chief. Young is charged with unifying initiatives and programs focused on improving the lives of residents and providing them with clean, safe neighborhoods and access to quality housing, recreational facilities, leisure opportunities and supportive services. Her salary increased from \$132,282 to \$148,000.

The city's former budget director, Melissa Carter, also received a pay increase from \$89,400 to \$115,000 after being promoted to head the new Office of Management and Budget, which is responsible for preparing the city's yearly and long-term fiscal plans, as well as taking on an expanded role in grants development. And David Keating, who previously worked as a real property director, had his salary increased from \$84,025 to \$90,327 after being put in charge of a revamped Real Estate Services Department that now oversees property acquisitions, facilities maintenance, cemeteries, and the Civic Center. Pay was only increased for employees who have taken on additional responsibilities so that they are being fairly compensated, **Hernandez** said. "We want to keep the good ones," he said. "And also we have key positions we have to fill and we need to be able to compete and attract a quality workforce." Cutting grass and dysfunction After years of complaints about property maintenance issues and delays in completing planned

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

projects, departments that never talked to one another were merged and new offices were launched as a way to eliminate government bureaucracy and improve focus, according to officials. To improve property maintenance, quality of life and tourism impacts, a new Code Compliance department was created. Previously, code-related activities were handled by multiple departments, prompting situations in which a property maintenance enforcement officer could not handle a zoning violation, or vice versa. In addition, property maintenance was only citing code violations on residential properties and letting violations on commercial properties go or referring them to the building department, **Hernandez** said. "So we said time out ... we're bringing all that in house," he said. "We're going to do cross-training and we're going to have commonality in how our code enforcement is handled and prosecuted."

Kevin Milton, a new employee with the city, has been hired as director of the department, with a salary of \$115,000. Former Property Maintenance Director Kimberly Corbin is now working as Code Compliance Assistant Director, with her salary remaining at \$80,368. Similar issues led to the consolidation of the city's landscape maintenance functions, including squares and monuments, into a new Greenscapes department. Prior to the consolidation, **Hernandez** said one team would cut an overgrown lot and then a different unit would come back a week later and cut the adjacent canal bank. And in some cases, **Hernandez** said, small equipment such as weed wackers would not be brought in until days after the larger mowers had cut down some city right-of-way. Now, work areas have been divided into grids that are maintained by regional teams responsible for basically anything that grows, **Hernandez** said. "They work a grid and don't leave that grid until everything is finished," he said.

Former Park & Tree Director Gordon Denney now heads the new department. His salary remains \$80,368. The reorganization also included the formation of the Capital Projects Management office, which **Hernandez** said put five full-time positions in charge of overseeing \$726 million in budgeted projects. That move was praised by Alderman Julian Miller recently when the council was given an update on the projects being funded by the voter-approved special purpose local option sales tax. Often-repeated concerns were raised about the time it has taken to complete some projects, and Miller noted that the department was created to address the issue. "This is one of those things going on behind the scenes that the public won't see that is really going to make a big difference," Miller said.

Staffing impacts

The restructuring came after the city imposed a hiring freeze upon **Hernandez's** arrival in October 2016, and at his direction only critical positions were filled for more than a year in anticipation of the changes. Almost 100 positions ended up being eliminated as part of the process, with about 40 of those vacant. Dozens of new positions were added, however, and impacted employees were given the opportunity to apply for those jobs. "In certain instances we were very lean in operations, and I think that was hurting us," **Hernandez** said. Seven employees ended up not being placed either because there was nothing available or they did not accept the position offered, according to city officials. And after the city council voted to add 24 new positions to the police department this year, there ended up being a total net reduction of one position, **Hernandez** said.

Not all employees' pay went up after getting a new position. One former assistant city manager,

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Peter Shonka, ended up having his pay reduced by \$15,624 to \$140,619 after he became head of a new arena development district office - the office focused exclusively on developing the new arena and stimulating private and public investment in the surrounding redevelopment area. Such pay reductions were unfortunate, but in some cases could not be avoided, **Hernandez** said. "There may have been several, although not widespread, due to reduction in responsibilities," he said. A number of other staffers retained the same salary, while taking on new roles. Bridget Lidy, former Tourism and Ambassadorship director, was hired as the new Planning and Urban Design director after her department was eliminated. Her salary remains \$85,703.

And Bret Bell, newly titled assistant to the city manager rather than deputy assistant, is now charged with handling legislative priorities, preparing the council's agenda, and working to ensure residents' concerns brought to the attention of aldermen are addressed. His salary remains \$107,205. In addition, former Economic Development Department Director Manuel Dominguez's salary of \$80,368 was left unchanged after he became head of what is now the Office of Business Opportunity, which is responsible for administering and coordinating the city's economic and small business development program. After being delayed for about two months as they attempted to find suitable jobs for all of the impacted employees, the reorganization became effective Feb. 1, said **Hernandez**, whose salary remains \$238,000. "One thing I want to stress to folks is patience," he said. "We just put this new organizational alignment into play."

Savannah Morning News (GA)
December 30, 2017

**City Manager Talks ‘Funkification,’ Ferris Wheels in Savannah
Opinions Expressed on Preserving Historic Structures Modernizing Others**

Author: *Eric Curl*

A modern looking arena could be in play, but a proposed Ferris wheel on River Street is out of bounds. City Manager **Rob Hernandez** recently shared his thoughts on architecture, historic preservation and development in Savannah, as the guest speaker at the Historic District Board of Review's recent retreat. During the hour-long discussion earlier this month, **Hernandez** also took time to describe one of his architectural "pet peeves." "I hate red brick," **Hernandez** said. "We seem to have this tremendous love affair with red brick." He said he would like the new arena the city plans to build west of the Historic District to have a more modern look, perhaps with stainless steel and glass, while still paying homage to history. "But it doesn't have to be rooted in red brick," he said.

The arena site is outside the board's jurisdiction, but Chairman Stephen Merriman Jr. later said he is not necessarily opposed to a more modern looking building being built at the site. "I would be more opposed to build an arena that appears like it was built in the 1850s," Merriman said. "It gives a false sense of history." **Hernandez** also made it clear that he believes City Hall is no longer an efficient place for himself and other city staffers to work or for the Savannah City Council to hold their meetings. He talked about his plan to build a modern municipal complex in order to consolidate the city's workforce, while possibly converting City Hall into a "working museum" where the mayor and aldermen could have offices. "We're going to preserve City Hall," **Hernandez** said. "We have to preserve it, but the day-to-day stuff can go somewhere else." The 111-year-old building is in serious need of repairs, and funds for the structure's restoration will need to be raised, possibly by including the project in the 2019 special purpose local option sales tax referendum, he said.

Hernandez got some pushback from board members when he said he was considering replacing City Hall's deteriorating wooden windows with modern faux-wood frames to make them more efficient and hurricane-resistant. Board members were concerned the move would ruin the building's historic integrity and lead to private developers also wanting to bypass ordinance requirements. They suggested the city install exterior wood windows with interior storm windows to achieve the results he is seeking. Otherwise, the historic protections in place would crumble, Merriman said. "That's one of the biggest things Savannah has going for it, is our ordinance," he said. There are some buildings that seem ripe for "funkification," such as the old East Side Theater on the corner of East Broad and East Gwinnett streets, **Hernandez** said.

The historic theater with the words "Hungry World" across the old marquee has sat vacant for decades. "Not to be disrespectful of its character, but you can do cool things with it," **Hernandez** said. "That building has a lot of potential." In a similar vein, he would like to "funkify" Martin Luther King Jr. Boulevard around the Interstate 16 flyover, which he considers an eyesore. There have been plans proposed to demolish the ramp into downtown, but **Hernandez** said he does not

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see the structure going anywhere anytime soon. But the city is too busy trying to put out daily fires and has little time to be creative, **Hernandez** said. "You're the folks that need to come up with those ideas and we'll support it when we can," he said. **Hernandez** also made it clear that some proposals will not fly as the city tries to balance the demands of tourism with preservation efforts and residential needs. Board members thanked him after **Hernandez** said he and the city council recently rejected a request to install a Ferris wheel on River Street.

The 137-foot-tall observation wheel would have been installed on a city parking lot along the water between the Abercorn and Lincoln street ramps at an initial rate of \$17,000 a month, under the lease agreement proposed by Missouri-based SkyStar Wheel. "When I looked at that request, I said no way," **Hernandez** said. **Hernandez**, who previously worked as the deputy county administrator of Broward County, Fla., became Savannah's city manager in October 2016.

Savannah Morning News (GA)
December 1, 2017

City Considers Budget Cuts, Fees to Cover its Shortfall
Hernandez: \$187 Million Proposal a Starting Point
Author: *Eric Curl*

Savannah staffers are proposing a variety of revenue generating options and expense cuts for the 2018 budget to determine whether the Savannah City Council wants to implement service enhancements or reductions in the face of projected funding shortfalls. The preliminary spending plan presented during the first day of a two-day budget retreat on Thursday amounts to a "bare bones, no frills and somewhat painful" general fund budget of \$187 million that includes almost \$13 million in cuts to personnel, services and capital project investment, said City Manager **Rob Hernandez**. "It's not even a recommended budget or a proposed budget," **Hernandez** said. "It's just a starting point for our conversation."

The second budget option of almost \$200 million would sustain existing services, as well provide funding for performance-based wage increases and increase reserve funds for unforeseen expenses. The third spending plan would be an "enhanced budget" of about \$213 million to cover expenses related to council priorities, such as additional police officers recommended by a consultant to improve emergency response times. Among the funding options staff presented was a proposed fee charged to all properties to cover the cost of fire department services and eliminate that department's dependence on tax revenue. Implementing a fee to cover the full cost of fire services would amount to \$370 per household and raise an estimated \$31.5 million, according to the budget report.

A consultant, Ecological Planning Group, also presented reduced rates as an option that would cover between 50 percent and 75 percent of fire service costs and raise about \$15.7 million to \$23.6 million. Property tax increases and decreases of between half a mill and two mills were also proposed, with revenue impacts ranging between \$2.5 million and \$10 million. "Anything you decide today for this budget is going to play out and have an effect for the next few years," said Erick van Malssen, who was working with the fire fee consultant. A hardship fund to assist low-income property owners is now being considered as part of the fire fee proposal, if it is adopted.

Savannah Alderman Van Johnson said he is still concerned about the fee's impact since renters would not be eligible to receive payments from the fund, even if the fee's cost was passed onto them by landlords. But Alderman Julian Miller said rental rates are established by the market and he does not expect tenants to be adversely affected as a result of the fee. Alderman Tony Thomas said renters would be impacted, but that the more than 5,800 tax-exempt property owners benefiting from fire services need to contribute to those costs. "Those folks have got to participate," Thomas said. "It's going to be tough for some people, but some people have been riding this system for decades."

The \$12.7 million in spending cuts are being proposed, despite projected increases in property

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tax revenue and other tax revenue streams this year and next. The shortfall is due to a combination of factors, including an increase of tax exemptions, operating costs and growing debt payments related to property purchases, infrastructure improvements and public safety purchases, **Hernandez** said. "We have a lot of needs in the city that far exceed the revenues available to us," he said. A surplus of about \$3.8 million is actually anticipated for 2017, due to higher than projected tax growth and salary savings from a hiring freeze. Those funds are proposed to be used to offset a budgeted use of reserve funds for 2017 and help cover expenses related to hurricane damages and capital project overruns.

The city is also anticipating some employee payouts due to some officers joining the county police department, following the split of Savannah-Chatham police. Planned civilian staff cuts stemming from a government restructuring should only result in a "handful" of employees actually leaving the organization since those impacted will have the opportunity to fill other positions, **Hernandez** said. The second day of the budget retreat is scheduled to begin at 8:30 a.m. Friday. During the workshop staff will need the council to make a decision on what type of funding options or cuts they want to move ahead with, **Hernandez** said. "I have to get some clarification on what they want to do because I have to put together a final budget," he said.

Savannah Now – Savannah Morning News (GA)
February 11, 2017

Poverty Persists in Savannah, Despite City Programs

Author: *Eric Curl*

Austin Spell, 20, wants to be a pipe-fitter or EMT. That is why he was recently sitting in a classroom at the Moses Jackson Advancement Center, where he and six others were registering for a GED program put on by Savannah Tech. Spell said he was pulled out of school by his stepfather in eighth grade and he does not have the educational background he needs to meet his career goals. “I’m planning on getting my bachelor’s degree and see what I can make out of myself,” he said. The GED program is one of many programs at the city-supported advancement center that are meant to help Savannah residents find employment. Still, Savannah’s high poverty level persists. The percentage of Savannah’s population living below the poverty level was almost 27 percent in 2015 — up from almost 22 percent in 2000, according to the US Census Bureau’s American Community Survey. The increase occurred as the city invested \$2.7 million in general funds in anti-poverty programs between 2011 and 2016, including \$642,600 to support the advancement center, according to a recent report presented by city staffers. During that time, another \$1.1 million was spent supporting Step Up Savannah’s job training and anti-poverty initiatives, and \$981,304 went toward various social service agencies.

About a million dollars in federal funds supported the advancement center and social services offered by America’s Second Harvest of Coastal Georgia, Union Mission and Lutheran Services of Coastal Georgia. Taffanye Young, Community and Economic Development Bureau chief, recently attributed the increased poverty rate to the recession when she presented the report to the Savannah City Council during an economic mobility workshop. “You had a lot of jobs that were lost,” Young said. “A lot of people with higher incomes and higher skills ended up taking some of the lower skilled jobs.” And job training is no “magic bullet” when residents have child care, transportation, substance abuse and criminal background issues to deal with, Young said. Only 17 percent of the 507 individuals who received job training through the city-funded programs since 2011 ended up becoming employed, according to the staff report. Those type of results are not satisfactory, City Manager **Rob Hernandez** told the council. “We may have to do something entirely different with some of these populations that have drastic barriers,” **Hernandez** said.

Hospitality programs

Other programs have fared better, however. The US Department of Labor’s Workforce Innovation and Opportunity Act only employed 34 percent of the 1,256 Chatham County participants since 2011, although many of those participants are still engaged in the program, according to the staff report. And since 2014, 316 adults received job training through the Step Up’s Chatham Apprentice Program, with 59 percent becoming employed. Another 159 jobs have been created or retained since 2011 for low- to moderate-income residents through a city-supported loan program administered by the Small Business Assistance Corporation. Goodwill of Southeast Georgia is helping residents find work with the launch this year of a hospitality training program at the advancement center. Rashena Platt, one of the six-week program’s

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participants, said that after three months of being unemployed, the program helped “get her foot in the door” and find a job as a housekeeper.

Whether hospitality-based jobs will help Savannah reduce the poverty rate has been a matter of local debate. The growing number of hotels has drawn some criticism from residents, who are concerned about the city becoming too dependent on what they contend are low paying jobs. But Borish Jenkins, a Goodwill Career Center assistant who conducts the training course, said the hospitality industry does offer opportunities for advancement and better pay. Hotel employees, for instance, can start as a housekeeper, go to front desk, then become a supervisor and from supervisor become a general manager, said Jenkins, a former hotel employee himself. “I know it can be lucrative,” he said. And some hotels, such as developer Richard Kessler’s Plant Riverside \$270 million hotel project being built along West River Street, are going to be offering higher pay, Jenkins said.

The Plant Riverside project is located in a state opportunity zone, which makes Kessler eligible for job tax credits for providing employment in an impoverished area. The hotel is supposed to create 700 full-time permanent positions with benefits, including health insurance, and Kessler is required to pay at least \$10.25 as part of the tax credit agreement, but he has said beginning wages could reach as high as \$15 an hour. As for Platt’s plans, she said she plans on working her way up to be a manager. “You always have an opportunity for advancement,” she said. “So just take your time and move up.”

‘Outside the box’

City staffers said that they plan on improving coordination among service providers, identify new revenue sources, aggressively promote programs, and think “outside the box” to reduce the poverty rate and provide more employment opportunities. Young said that the city may want to try to re-implement a partnership with a local church that had retirees provide training, such as brick laying, for residents seeking job skills. Staff is also working on a proposal that will hopefully address some of the hard to hire issues with respect to city contracts and city employment, **Hernandez** said.

<https://www.wsav.com/news/savannahs-city-manager-on-his-first-3-weeks/>

Nov 9, 2016

Savannah's City Manager on His First 3 Weeks

by: Andrew Davis

He was the choice of the council to lead the city of Savannah. In just three weeks on the job, City Manager **Rob Hernandez** has already been through a hurricane and multiple murders. But what does Savannah's City Manager think the next three weeks, months, even years may hold.

"Making decisions without having all the appropriate facts or knowing all the different facets of the community that could be dangerous," said **Hernandez**. That's why **Rob Hernandez** says he is in "listen, learn and observe" mode. Observing the community he now helps shape.

Shaping with a community and a staff he has already seen deal with a hurricane, and thrive under pressure. "The reverse would be that i'm here 6 months or a year and we would have a crisis and what would be going through my mind would be, well i don't know who I would rely on, I don't know how this team is going to perform, I now know that," explained the City Manager. He also knows is that crime in Savannah is a problem. "The community is very concerned about it, the community expects us to take proactive measures and we have," said **Hernandez**.

But the same community also may be too focused on each and every criminal act. "When we have an instance of crime that happens here its unfortunate," explains **Hernandez**. "But it stands out more i think in the community mindset because its out there its closer to them it gets publicized more in the city of Savannah." But he is not ready to rubber stamp the high cost of putting more officers on the streets. Stressing Fiscal responsibility, he hopes to find "progressive" ways to get police what they want in 2017. "My job is to balance all the competing needs in the community and to try to make a fiscally sound and operationally sound recommendation to the nine that eventually have to make the decisions," explained the City Manager.

The decisions about growth of our city is foremost on **Hernandez's** mind. "We cant afford to be as methodical as we have been in the past again because the world is moving at a breakneck speed, and we have to keep up with the world," said **Hernandez**. "Are we behind?" "I'm not saying we are behind. But we have to pick up the pace." Pace of life, and pace of drawing businesses to Savannah. "Make sure they know Savannah more than just a great place to visit. A great place to relocate your business," said **Hernandez**. "Oh and by the way they have a really great local government as well."

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Sun Sentinel
SEP 21, 2016

Deputy Broward administrator leaving for Savannah

By Brittany Wallman

The No. 2 official in Broward County government has resigned, after accepting a job in Georgia. Roberto "Rob" **Hernandez**, deputy county administrator, said in a letter to County Administrator Bertha Henry earlier this month that it was with "great sorrow" he submits his resignation.

Hernandez was responsible for a large portion of county government, and also brokered the deal with the Florida Panthers that increased the hockey club's public subsidy but helped ensure the team would stay. In a handwritten note on the resignation letter, he thanked Henry for mentoring him, and giving him "the tough tasks to take on, like the arena."

Besides the deputy position, Henry has two assistant county administrators, Monica Cepero and Alphonso Jefferson, and two assistants to the county administrator, Gretchen Cassini and Alan Cohen.

Hernandez has been the deputy in Coral Springs and in Atlanta's Fulton County. But he said his professional goal was to be in the top position. "I'm not getting any younger and the years are just flying by, so this was the right time and the right community," the 50-year-old **Hernandez** said in an email recently. "I did not want to take any city manager or county manager job just for the sake of it, unless the community was right. Savannah is a nice town with lots of positive attributes and challenges, too." **Hernandez's** resignation is effective Oct. 9.

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WTOC 11 (GA)
August 11, 2016

City of Savannah Names Roberto Hernandez as Sole Finalist for City Manager

Author: *Sean Evans*

The City of Savannah held a news conference on Thursday to discuss updates in the search for the new city manager. After a nationwide search, and in a unanimous consensus and recommendation, **Roberto Hernandez**, deputy county administrator of Broward County, Florida, has been named the sole finalist for the position of City Manager of Savannah. Choosing **Hernandez** was a unanimous decision by city council members, and **Hernandez** has accepted the offer pending contractual negotiations according to Mayor Eddie DeLoach. DeLoach said **Hernandez's** hands-on approach, experience in government and energy are some of the qualities that separated him from the other candidates.

According to the Broward County Government website:

Hernandez is an ICMA-Credentialed Manager with more than twenty years of progressive and responsible local government management experience. He re-joined Broward County in July 2013 as Deputy County Administrator. Previously, he served as Deputy City Manager for the City of Coral Springs overseeing various city functions as well as the city's community redevelopment agency. Prior to Coral Springs, he served as Deputy County Manager for Fulton County, Ga., where he oversaw public safety agencies, unincorporated area services, the Office of the Child Attorney, offender reentry program, and coordinated with the County's constitutional and judicial agencies. He previously served Broward County in a variety of capacities from 1994 through 2008, including serving as an Assistant to the County Administrator from November 2003 to June 2008. **Rob** retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

Hernandez was a finalist for two other jobs previously. He was a finalist for the El Paso County, TX County Administrator position earlier this year, and was a finalist for the Delray Beach City Manager position in 2014. **Hernandez** talked about the advantages the region presents, with the ports, travel opportunities with Savannah-Hilton Head International Airport and the proximity to the beach and overall rich history, as well as the military presence. "I was very impressed by the passion from the city council in terms of what they see happening in the city over time, and their strong dedication to the community. That really, that really sold me," said **Hernandez**. While in Fulton County, **Hernandez** oversaw multiple departments including police, fire and rescue and also served as the county manager's liaison with judicial agencies.

Mayor DeLoach says he believes **Hernandez** could come in and start working right away with the police department and judicial services in Savannah to address crime. Alderwoman Carol Bell says she was impressed with how much **Mr. Hernandez** knew about the city and its operations already. So WTOC asked the front-runner what he's observed so far and hopes to achieve as the next city manager. "The need for continued re-investment in certain communities, a progressive strategy for bringing new investment for the community, for growing jobs. For

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fixing and updating the condition of the infrastructure. Those are the things that everybody goes through, it's very common. But that's certainly something that I'm going to have to tackle once I get there," said **Hernandez**. Savannah City Council members met on Wednesday to hear from the search committee about where they are on the final candidates up for the position. The council and search committee then met behind closed doors in an executive session.

Current City Manager Stephanie Cutter announced her retirement at the beginning of the year, setting into motion a nationwide search for her replacement. So, what exactly was the city looking for when they put out the posting for a new city manager? It's an important question given that at least the last two city managers were not what the respective city councils eventually wanted in the role. First of all, for those who forgot or perhaps never knew, ours is a Council/City manager form of government. Meaning while the council appoints a city manager, the city manager runs the city and some might argue, the city council itself.

First and foremost council was looking for a person who had worked with and understood the challenges of a diverse community, not just racially but economically. Someone who could bring new ideas for breaking the cycle of poverty among those living in certain neglected parts of Savannah. And, of course, someone who bring new ideas to the table when it comes to fighting violent crime, in particular, gun violence. Here's an interesting role they want this person to fill: possible ax-man. Council, at least the newest members, want this new city manager to review city government top to bottom and start cutting if Savannah's City Hall has gotten too big, and taxpayers are paying too much for something that could be done with fewer people and resources.

For filling this role, our new city manager will receive the city's benefits package and a salary between \$210,000 and \$300,000. That's yet to be negotiated if **Roberto Hernandez** is our man. We mention briefly where this candidate has been and what positions he's held in the past. You may be thinking of all his deputy roles that this guy has always been the groomsman and never the groom. And **Hernandez** anticipated that issue in his actual resume' saying, "...I've resisted the temptation to 'chase' city manager positions solely for the sake of becoming a city manager at any cost. Instead, I've judiciously and patiently served in deputy roles in great organizations and exceptional communities."

Hernandez considers himself a pretty simply, straight-forward guy. He says his management style is fluid. It adapts to the specific situation. Not that we're looking yet, but **Hernandez** will tell you he is clean. This is what he told recruiters before tossing his hat in the ring: "...There is 'no dirt' on me. I live a clean, simple life, prefer to tell things as I see it, and sleep well at night." We will continue to follow those negotiations and let you know exactly what the city decides when it comes to salary, contract length, start time and other allowances.

Tribune Content Agency News Service (USA)
May 20, 2016

Is Broward ready for a hurricane hit? Drill shows how rescue would work

Author: *David Fleshler*

May 20--After raking the Florida Keys and Miami-Dade County, Hurricane Kimo reached Miramar as a lethal Category 3 storm, with sustained winds of 129 mph, and tore a diagonal corridor to Deerfield Beach. The slow-moving storm bore into the county for seven hours. A tornado struck Pembroke Pines, Cooper City, Davie and Fort Lauderdale. An eight-foot storm surge trapped people on barrier islands. With cell towers damaged, many smart phones became useless. This was the scenario Thursday as Broward County conducted a full-scale hurricane drill at the Emergency Operations Center in Plantation to prepare for the June 1 opening of hurricane season. About 300 people gathered on the operations center's vast open second floor to practice receiving calls for help, coordinating responses and dealing with the countless challenges of a natural disaster.

"We've got to get it right the first time," **Rob Hernandez**, deputy county administrator, told the group. "The public expects that we'll get it right the first time. We can't offer them excuses. There are no alibis, there are no mulligans." The scenario began seven hours after the all-clear, as the county lay damaged, darkened by power outages and full of a untold crises, with fatalities reported, residents trapped by floodwaters and many situations requiring immediate attention. Like much of contemporary life, the response to the crisis would be coordinated largely through a computer software program, in this case WebEOC 8.0, a crisis-management system developed by Intermedix Corp. of Fort Lauderdale.

As calls for help and reports of problems such as power outages came in, it was up to those in the room to route them to the right agency or issue the correct orders to deal with them. The group included representatives of law enforcement agencies, fire departments, the county government, Florida Power & Light Co., city governments, the Red Cross and many other organizations. A call to rescue four people trapped on a roof in Oakland Park was routed to the Broward Sheriff's Office, said Major Kevin Shults, who headed the Sheriff's Office group at the emergency operations center. But the law enforcement agency's helicopters didn't have the sort of basket-and-line system required for such an endeavor. They asked the Coast Guard to do it instead. A call for water came from Pompano Beach, where the storm damaged the treatment plant, reducing its output by half. Alan Garcia, director of the county's division of water and wastewater services, ordered emergency interconnects from a county water plant that would temporarily provide the city with sufficient water.

In the pressroom, public communications specialist Cindy Malin scrawled occasional updates on a white board: "Flooding and tornado damage throughout county. Exact location TBD." "Drones being used to assess damage." As the various reports, crises and calls for help came in, evaluators in green vests observed the work in each area. They will prepare written reports. The Red Cross, which operates shelters, faced a crisis when 2,500 people showed up at a Coconut Creek shelter that was already full. The issue was "escalated" to a high-ranking group of

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Roberto Hernandez
(Articles are in reverse chronological order)

decision-makers, who authorized the opening of an additional shelter. "The exercise is to test our abilities to collaborate, communicate and respond," said Roberto Baltodano, the Red Cross' regional communications manager. "These are things that could happen during a real hurricane. We've had these hurricane scenarios." The county has not seen a direct hit from a hurricane since Wilma in 2005. "It's been 11 years since we had one," County Mayor Marty Kiar said to the group before the drill began. "Hopefully this will be another year that we're hurricane-free. But eventually we're going to get hit."

South Florida Sun Sentinel (FL)
Dec 8, 2015

Deal helps Panthers, helps Broward more

The Broward County Commission should approve a new agreement today with the Florida Panthers because the deal would better protect the public's investment in the BB&T Center. One can argue persuasively the county was wrong to make that investment of tourist tax revenue 20 years ago, when the Panthers wanted out of the old Miami Arena. A National Hockey League team draws fewer tourists than Broward's beaches and the convention center. The county, however, can't back out of that commitment. With that in mind, county administrators make their more persuasive case for the front-loaded \$86 million deal that would run through 2028.

One argument against the deal is the public shouldn't subsidize the rich owners of the Panthers. Deputy County Administrator **Roberto Hernandez** responds that the money -- none of it property tax revenue -- would go toward the arena, not the Panthers. The team owners also run the company that manages the BB&T Center. They would have to spend the \$86 million on improving, operating and promoting the arena, of which the team is the main tenant. The county would have to sign off on the improvements. The team also would continue to pay \$5.3 million per year toward the arena's debt, which will be paid off in 2028. So the county's investment would go to the county's facility.

The other main argument against the deal is the county should spend the money on projects that better play to Broward's tourism strengths -- such as beaches. Two other key priorities are an expanded convention center and a convention center hotel. The arena is far from the county's major tourism hubs. **Hernandez** acknowledged, "We are very sensitive to that." He believes, however, the county can "meet all of our obligations" regarding tourism promotion, especially beach renourishment. County officials, **Hernandez** said, routinely have made conservative estimates of 3 percent for increases in tourist tax revenue. In fact, annual increases have been more like 5 percent.

The county has put much of that balance in reserve, **Hernandez** said. A recent study of the tourist tax questioned the amount of money held in reserve. Doing so, **Hernandez** said, means the county can use that money for one-time projects like beach renourishment and still pay the recurring expenses of the Panthers deal. Part of this story is the coming debate over raising the tourist tax from 5 percent to 6 percent, even though none of that potential revenue is part of the Panthers deal. It is generally agreed money from the sixth cent would go toward convention center expansion.

Hernandez said the county is waiting for bids on the expansion. When administrators have an idea of the cost, the county will start discussions on raising the tax. Miami-Dade and Palm Beach counties have raised their tourist taxes to 6 percent. +The deal would cut the county in for a share of profits if the money-losing Panthers became big winners on the ice and financially. The arena would have a better chance of getting an all-star game, and the team would continue to help youth hockey in Broward. All are nice points, but the focus of the deal, correctly, would remain

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on the BB&T Center. The healthier it is, the better for the county. Losing the Panthers would mean losing 40 dates, and the BB&T Center has lots of regional competitors. So the arena is healthier with the Panthers, and with the team having a better chance to succeed.

Having studied the financials, **Hernandez** said, "We came to the conclusion that it would cost the county almost as much if the team stayed as if the team left. It's almost an economic wash. So if we would pay with or without them, it's better to have them." The deal would allow the Panthers to leave after eight years, but the team would have to repay the \$72 million in tourist tax revenue it had received. If the team left after eight years, the county would have enough money to repay the arena debt. As long as the Panthers stay, **Hernandez** said, "We transfer a lot of the responsibility to the team." The county also would get development rights to land around the arena. One other point in the deal is worth noting. Two decades ago, the county committed to spending two cents of tourist tax revenue on the arena. The county hasn't met that obligation. Under the deal, **Hernandez** said, the Panthers would drop all claims to any unspent money. There might be emotional reasons to reject the Panthers deal. There are better business reasons to approve it.

Capital Gazette (PA)
March 3, 2015

Broward Commission Brainstorms Ways to Help Struggling Center Pocket of County

Author: *Brittany Wallman*

In the heart of Broward County is a zone of economic depression that even the most dramatic real estate boom didn't lift out of poverty. The unincorporated neighborhoods in the 33311 zip code — roughly between Interstate 95 and U.S. 441, north of Broward Boulevard — were left behind by the cities around them. No city will take them. County commissioners are their only local government. Commissioners met Tuesday to talk about the central county community — four mostly African-American neighborhoods of about 7,000 people — and agree on a host of small efforts to help. Only \$4.8 million is allotted for economic development there — a sliver of the county's overall \$4.1 billion budget. County Commissioner Dale Holness, the area's only direct local representative, said it's the first economic development money the county has spent there since the 1980s. About \$30 million has been spent on improvements of roadways, bus shelters, drainage and the like. The moves commissioners endorsed Tuesday are hardly dramatic: Relocating a Boys and Girls Club to Delevoe Park, continuing building homes on 144 lots the county owns, working with small businesses to improve properties by offering loans or grants, giving a makeover to some of the roadways, improving parks, and banking land for future redevelopment. No one promised an immediate turnaround. "It doesn't happen overnight," county Economic Development Director Sandy-Michael McDonald warned. But county leaders said they support a renewed focus. "I'm glad to see we're moving forward with some planning," Holness said, "because the community desperately needs it." While the rest of Broward enjoys a rebound from the Great Recession, with three years now of positive economic growth, the central county zone remains stagnant. "These communities look to us to guide them along the way to economic prosperity in their neighborhoods," Deputy County Administrator **Rob Hernandez** said.

Joblessness is down to about 5 percent countywide. But in Central Broward, it ranges from 21 percent in Boulevard Gardens, to 22 percent in Roosevelt Gardens, to 32 percent in Washington Park, to an astounding 44 percent in Franklin Park. Holness said many residents there lack transportation and job skills, and some have criminal backgrounds — all obstacles to employment. Countywide, the median household income is \$51,251. In the central county area, it's significantly lower, at \$33,432, Assistant County Administrator Alphonso Jefferson said. Crime is down there, county officials said. Still, the number of rapes, burglaries, car thefts and assaults are relatively high in such a small area, county leaders said, and residents complain they regularly witness drug deals and prostitution, as well as assaults. Broward County Administrator Bertha Henry said she would begin implementing the economic development ideas discussed Tuesday. McDonald said he hoped to leverage the money to spark private investment from business owners. Each project will return to a County Commission agenda for approvals. Across downtown, at the Fort Lauderdale City Commission, Commissioner Robert McKinzie asked that the city take another look at annexing the unincorporated areas. The city will move in that direction.

Broward New Times (FL)
March 18, 2014

Florida Panthers Asking for Public Money, but Proposal Seems to Benefit Only the Team

Author: *Chris Joseph*

Looks like the Florida Panthers' latest proposal to Broward County has altered language that would basically screw over the county while they make the big dough, according to a rundown of the proposal by the Sun Sentinel. The first proposal the Panthers made at the beginning of the year had asked the county for something around \$70 million, claiming that they had been losing \$20 million and that they need public funds to keep from being dissolved from the NHL. This latest proposal asks for \$80 million or more. The Panthers also want to develop 22 acres north of the BB&T Center for a casino-hotel that the county is also supposed to pay for. The Panthers turned over the 57-page proposal to Broward County commissioners and, according to the Sentinel's findings, it boils down to more money for the team while the county gets the shaft. Those wishes are not far off from when the team asked for county money originally back in January. The team's original proposal included taking \$4.5 million of its annual payment off the books and having it picked up by Broward County. The team also asked the county to contribute \$500,000 a year toward maintenance.

The latest proposal says the Panthers need a hotel-tax subsidy package worth \$80 million over the next 14 years to keep them from losing money. But the overall deal would seem to benefit only the Panthers. "As currently written in their proposal," Deputy County Administrator **Rob Hernandez** told the Sun-Sentinel, "it would definitely have an impact on our ability to share in any of the profits." County officials say they won't support the proposal without a better return for Broward's taxpayers. Back in September, the Panthers were bought for \$240 million by Cliff Viner and Sunrise Sports & Entertainment to a group led by New York businessman Vincent Viola. The Panthers have had an operating loss of \$12 million for the 2011-12 season and were worth \$170 million, according to Forbes. As for Panther and hockey fans' reaction to this, they took to Twitter with the usual vitriol.

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Roberto Hernandez
(Articles are in reverse chronological order)

US Fed News (USA)
August 11, 2013

Broward County Names New Deputy County Administrator

Author: *Staff*

Broward County has issued the following news release:

Broward County Administrator Bertha Henry has announced the appointment of **Roberto "Rob" Hernandez** as the new Deputy County Administrator. **Hernandez** is an experienced public servant who served as deputy county manager for Fulton County, Georgia, and most recently as deputy city manager for Coral Springs in Broward County. He is returning to County Government, where he first began serving the County in 1994 and most recently served as an assistant to the county administrator from 2003 to 2008. As deputy county administrator, **Hernandez** will assist the administrator in managing the day-to-day operations of the County, and oversee the activities of several large departments, including Public Works, Human Services and Environmental Protection and Growth Management, as well as the Parks and Recreation, Libraries and Cultural divisions. Also reporting to **Hernandez** will be the Office of Economic and Small Business Development, Office of Public Communications, Office of Intergovernmental Affairs and Professional Standards, and the Office of the Medical Examiner and Trauma Services.

Henry said, "We are excited to have **Rob** back with Broward County. He has dedicated much of his professional life to public service and has a keen understanding of how county government programs and services help meet the needs of our residents, businesses and visitors. He will be a valuable asset to the County and the community." **Hernandez** has a bachelor's degree in public administration from Florida International University, and a master's degree in public administration from Nova Southeastern University. He is a graduate of the Broward Fire Academy and the U.S. Army John F. Kennedy Special Warfare Center and School. He retired from the U.S. Army Reserves in 2008 after a 23-year career, most recently serving as a senior instructor in civil-military operations.

McClatchy-Tribune Regional News (USA)
February 6, 2013

Brief: Coral Springs Offers Incentive to Company

Author: *Lisa J. Huriash*

Taxpayers will be handing over cash to a new business considering coming to town, although they don't know yet who is getting the check. City officials said the business, described as a "pharmaceutical manufacturing, research and development" company, is a coup for the city. The company is expected to bring 108 jobs and a new source of tax revenue to the city.

Dubbed "Project Rock Solid," the business will receive \$540,000 in state, county and city money in incentives through the state's qualified target industry tax refund program. In addition to the city's portion of \$54,000, city commissioners agreed Tuesday to allow \$825,000 in credits that would normally be paid for fees such as building permits.

"The bottom line is if we don't offer incentives, somebody else will," said **Rob Hernandez**, deputy city manager. "It's the cost of doing business." The company is allowed by state law to remain unknown to the public while it's in this process of receiving incentive money. **Hernandez** said the company asked to remain anonymous for competitive reasons.

McClatchy-Tribune Regional News (USA)
December 13, 2012

Coral Springs to Consider building New City Hall

Author: *Lisa J. Huriash*

City commissioners said Tuesday they were open to the idea of spending millions of dollars to construct a brand new City Hall. "To me, the short answer is yes," said Commissioner Claudette Bruck. "We should proceed and we should proceed now." City leaders must now decide if they really want the new building, where it will go and how to pay for the estimated \$25 million cost. It will eventually be a "financial decision," said Vice Mayor Tom Powers. "There's way too many questions." For about a year, former Mayor Roy Gold had proposed closing both City Hall buildings on the north and south sides of Sample Road to construct one large facility.

But while some commissioners had previously said the project could become unwieldy and too expensive and they doubted there would be public support, the majority now seem open to at least further discussion. Deputy City Manager **Rob Hernandez** said the 45-year-old building was "outdated and functionally obsolete." "You can go anywhere and hear conversations in the next office," he said. And, the current building is "not a source of civic pride." "That's depressing," Bruck said. **Hernandez** also said the current building is expensive to keep up, with \$1 million alone needed to retrofit the building to accommodate a new telephone system.

"If we're pouring money into a facility that is no longer worth pouring money into," the commission should consider a new building, said Commissioner Dan Daley. City Manager Erdal Donmez said the city staff will come back with "more refined numbers" in late January with the projected costs to build a new City Hall at various spots, which include the current location, Mullins Park, and the area envisioned to be built as a downtown.

Several South Florida cities have recently built new City Hall complexes. Doral earlier this year spent \$22 million on its new building and Wellington built its new building last year for \$10.5 million. In Coral Springs, officials said municipal bonds would be the best way to cover the expense Commissioner Larry Vignola said he has always opposed the plan and still does. "Is it a top priority to spend more than \$20 million on? Not in my opinion, and not in the opinion of the majority of our residents. I don't why we're still talking about this. I don't think now is the time for a project like that."

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South Florida Sun Sentinel (FL)
November 24, 2011

Springs Gets New Deputy City Manager

Author: *Arun Sivasankaran*

Roberto Hernandez, who has over 20 years of progressive and responsible local government management experience, has been appointed Coral Springs Deputy City Manager. "I look forward to leveraging **Rob's** operational expertise to continue delivering exceptional services to our community with the best possible level of service," City Manager Erdal Donmez said. Prior to joining Coral Springs, **Hernandez** was the Deputy County Manager for Fulton County since 2008. **Hernandez** also served as an Assistant to the County Administrator for Broward County. Before that, **Hernandez** served in a number of key roles with local government.

His professional experience includes key positions in public safety, housing and community development, and social services. In addition, his military service includes more than 23 years in the U.S. Army Reserves. He has held several leadership positions and has served on Active Duty in support of several military operations. **Hernandez** holds a Master of Public Administration degree from Nova Southeastern University and a Bachelor of Public Administration from Florida International University. **Hernandez** also obtained his certification in firefighting from the Broward Fire Academy.

The Atlanta Journal-Constitution (GA)
May 25, 2011

Illegal Dumping

Putting the Brakes on Tire Dumping

It's no Easy Task as Illegal Activity Stealthily Spreads Across State

Author: *Ernie Suggs*

Over 10 days last fall, someone made three trips to the Arts Exchange and dumped more than 1,000 old, dirty tires onto the property. The location was ideal. Easy access off I-20 in southeast Atlanta. A dead-end road. A wide-open space. Across Georgia, there are hundreds of examples of illegal tire dumping such as this, on public and private lands, creating a problem that is as much health hazard as it is eyesore. Of 10 million scrap tires generated in the state annually, an estimated 1.5 million are discarded illegally, the Georgia Environmental Protection Division said. And Atlanta finds itself at the center of this rubberized abandonment, with its city council compelled this week to form a separate tire commission to combat the violators. The city annually deals with 450,000 scrap tires, nearly 70,000 of them dumped illegally, said Winthrop Brown, Georgia EPD program manager.

Not surprisingly, money is at the heart of this problem: Tire salvagers get paid to collect tires but many of them won't pay for recycling. So they dump the tires. Everywhere they can. "It is a very significant problem in the state, because of the expense and because these tires are breeding spots for mosquitoes and vectors," said Brown, noting that Newton County last year collected 67,000 dumped tires. "Dumping is bad in metro Atlanta because of the population, but dumping is increasing in rural areas because of the distance they have to travel to get rid of tires."

As part of his job, the EPD's Brown regulates how tires are disposed from car dealerships and tire shops, among others. Businesses must pay for a carrier to pick up truckloads of old tires. Otherwise, there is little concentrated enforcement. Tire dumping is a felony, but there are just five criminal cases currently pursued by the state, though several people previously have served prison time for this offense, Brown said. "If nobody calls it in, we have a hard time prosecuting," Brown said, adding there are only a few local jurisdictions, such as Columbus and Macon, that have their own laws on the books, though state regulations exist. In April, Atlanta Councilwoman Joyce Sheperd, who pushed for the tire commission, led a clean-up in District 12 in which 2,000 tossed tires were collected. In southeast Atlanta, she has overseen the retrieval of 4,711 tires this year, and more than 10,000 over the past five years.

Fulton County Deputy Manager **Rob Hernandez** said south Fulton has the same problem as Atlanta with illegal tire dumping and no ready solution. The county has considered putting a deposit price on used tires, similar to glass bottles, to encourage residents to take them to a landfill. "It's difficult to prosecute offenders unless they're caught in the act," **Hernandez** said, "and Fulton lacks the staff to try to trace tires back to suppliers and find out who they were sold to." Last summer, the Fulton County health department spent \$23,000 on a tire drive that netted 2,100 tires. The public works department pays \$50,000 per year to dispose of old tires. "This has been a real problem for us," said Cheryl Odeleye of the Arts Exchange, surveying the endless

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and unwanted black mountain left near the center. "It is a health hazard. And it is a morale downer for someone to come in and be so disrespectful to us."

Piles of old tires don't necessarily present toxic health issues, rather they serve as nesting places for rats, snakes and mosquitoes, little consolation to those left with this mess. Across metro Atlanta, jurisdictions vary in how to deal with dump sites. DeKalb County officials said they defer to state law in dealing with tire dumping. In Clayton County, illegal dumping can land someone in jail for six months. Cobb County claimed it hasn't had much of an issue with discarded tires, outside of a few isolated incidents. "What a lot of people don't understand is that there are a lot of expenses involved in tire disposal," Dewey Grantham of Liberty Tire Recycling said.

If operating lawfully, a carrier takes used tires to a recycler, where in Georgia there is a 90 percent chance these tires will be converted to fuel. A carrier typically charges \$2 per tire, but has to pay the recycler \$1 for each, cutting into the profit. An illegal carrier might charge \$1.50 per tire on pick-ups, bypass the recycler and leave the tires at an isolated place like the Arts Exchange. There also have been cases in which people have rented trucks and abandoned them filled with old tires. Bolder criminals have stocked empty warehouses with worn tires. The state lacks funding to properly monitor tire disposal. For every new tire larger than 12 inches and sold in Georgia, a consumer pays a \$1 fee, which was supposed to go to a solid waste fund. Yet for two years, state lawmakers have diverted the funds elsewhere, covering other needs. Limited state spending also has resulted in fewer inspectors, making it harder to monitor and clean up tire dump sites.

The Arts Exchange, even with more than 1,000 tires, had what was considered a small clean-up. Liberty Tire Recycling volunteered to remove the tires, employing four workers. The tires were loaded in less than two hours. Grantham said his company processes 25,000 tires daily. "What is unfortunate is that illegal tire dumping gives tire recycling a bad name," Grantham said.

Tire disposal

Number of scrap tires generated in Georgia annually: 10 million

Number of those that are disposed of illegally: 1.5 million

Fulton public works department's expense each year for tire disposal: \$50,000

State fee charged on each new tire larger than 12 inches that is supposed to fund a solid waste fund, but has been diverted for the past two years for other purposes: \$1

The Atlanta Journal-Constitution (GA)
May 16, 2011

Your Tax Dollars
Grumbling Greet Amphitheater
Supporters See Boon for South Fulton; Opponents Question Use of Funds
Author: *Johnny Edwards*

South Fulton has a lot to brag about these days. After last week's announcement that Porsche would leave Sandy Springs to build its North American headquarters near Hapeville, Fulton County officials will open the new 5,200-seat Wolf Creek Amphitheater. Supporters are counting on the venue becoming another Chastain Park, a regional draw where picnicking music fans take in classy, intimate concerts. Fulton County Commissioner William "Bill" Edwards, who has championed the \$6.1 million project for the past decade, predicts it will draw the spending power of concertgoers from throughout the metro area to nearby stores and restaurants, bolstering a local economy hit hard by the recession.

But the amphitheater is a sore subject for north Fulton residents who say it's another case of the county government using their tax money for projects that don't benefit them. State Rep. Lynne Riley, R-Johns Creek, who opposed the amphitheater when she was a Fulton commissioner, said the \$6.1 million shouldn't have come from the county's general fund. "Every citizen of Fulton County, regardless of where they live, top to bottom, is underwriting the cost of operating that facility," she said, "whether it's a gain or a loss."

Edwards said south Fulton residents pay county taxes, too. "South Fulton needs to be able to live, work and play right where they are," he said. Business owners between the amphitheater, which is off Camp Creek Parkway, and I-285 expect a boost. Anwar Noorali, owner of Camp Creek World of Beverage, predicts a 15 percent to 20 percent increase in business on concert days from wine shoppers. "Any economic activity, and concerts that bring in a lot of people, will definitely be good for the local economy," Noorali said.

But some point to the location -- in the flight path of the world's busiest airport -- as an issue. Michael Fitzgerald, a Johns Creek resident and member of the Milton County Legislative Advisory Committee, said he can't fathom making a 45-mile drive to attend a show there, not with the constant roar of jet planes overhead. "One of the problems with Fulton County is it's too big, and that's a long way," he said.

The Wolf Creek Amphitheater has stirred tensions along the way. When the construction contract was approved in 2008, Riley and Commissioner Tom Lowe were outvoted 4-2. Riley contended that figures from a 2005 feasibility study -- which predicted the amphitheater would be profitable after three years -- needed to be updated. Edwards fired back that she and Lowe were trying to sabotage a revenue-generating project that south Fulton wanted. Edwards also brought up that the county spent \$1 million on Alpharetta's Verizon Wireless Amphitheatre, which was privately built. The county's contribution came through a trade-off for north Fulton not having garbage service at the time. Gary Bongiovanni, editor-in-chief of Pollstar Magazine,

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said a 5,200-seat venue will have a tough time up against the 6,500-seat Chastain Park in Buckhead, the 12,000-seat Verizon amphitheater, and the 19,000-seat Aaron's Amphitheatre at Lakewood in southeast Atlanta. The proximity to Hartsfield-Jackson International Airport won't help, Bongiovanni said. "Especially if you're talking about doing any acoustic acts," he said.

Fulton County Arts Council interim Director Michael Simanga, whose department will run the amphitheater, said he isn't worried about planes. Before construction began, the county held free concerts at the site, including Atlanta Symphony Orchestra performances. "You can't really hear it, once the music is playing," Simanga said. Grammy-winning soul/R&B singer India Arie will perform a free concert June 4 for the grand opening. No shows have been booked after that, he said, though he's in negotiations for some. Riley questions whether Wolf Creek will cover its operating costs.

The county doesn't have a detailed operating budget yet. Deputy County Manager **Rob Hernandez** said planners didn't expect the facility to be finished this soon, so the upcoming concert season will be something of a trial run, with 10 shows at the most. The plan is to recoup costs through concert bookings, and the County Commission has approved a fee schedule. Expenses should be limited to electricity, water, janitorial maintenance and groundskeeping, like any public park, **Hernandez** said.

Wolf Creek was the shooting venue for the 1996 Olympics, and it currently houses a police training center. A new library is in the works, and other plans include a sports complex, walking trails, horse trails, and an arts, cultural and events center, which also could generate revenue through bookings, Edwards said. Alre Alston, owner of the Ultimate Bar and Grille in Camp Creek Pointe shopping center, expects the amphitheater to bring him customers before and after shows. "I think it will be a good thing, as long as they bring in the quality clientele, not the rough clientele," he said.

Edwards said the county won't allow hard-core rap acts. He's looking for shows that appeal to south Fulton residents, citing performers that played free concerts -- R&B groups such as the Manhattans, the Spinners, the Dells and the O'Jays. However, he said, north Fulton residents are welcome to book shows, too. The amphitheater also can be used for church functions and graduations. On a recent visit, Edwards showed off the massive stage, the pristine dressing rooms for stars and the 4 feet of legroom between the rows of seats. He said he has no doubt the project will pay for itself. "It isn't about being sustaining," Edwards said. "Let me tell you what we want to pay: lights and water. This is for the people, for people to come out here and have a good time."

The Atlanta Journal-Constitution (GA)
January 22, 2011

**Fulton Hikes Club Fees Despite Suit
Judge Declared Adult Ordinance Invalid after Free Speech Dispute
Strip Joints' Attorneys Debating Next Step**
Author: *Johnny Edwards*

Fulton County will raise fees on strip clubs by hundreds of dollars this year and double them for nude dancers, even though the county remains locked in litigation over the fees after a federal judge recently declared the adult entertainment ordinance unconstitutional. With no discussion, the commission voted 5-1 this week to raise a list of fees on businesses and residents in unincorporated south Fulton expected to generate an extra \$303,601 per year. Amid new and increased rates for false alarms, fire safety inspections, escort services and door-to-door salesmen were several license and permit hikes on the county's three nude bars off Fulton Industrial Boulevard.

Attorneys for the clubs say they are considering what to do: whether to seek an injunction or pay the fees and hope to recoup them as damages. "I don't know what right they have to increase them when the case is still being litigated," said Jim Cline, who represents Riley's Showbar. "I guess they can do whatever they want. I guess we can argue about it when we get to the end." **Rob Hernandez**, the deputy county manager for the South Fulton Special Services District, said the county attorney advised officials that since the lawsuit is still pending, Fulton is justified in raising the fees. If a club refuses to pay, it could have its license revoked and would face closure, he said. "There was an injunction ordered on certain aspects of the ordinance, but not all aspects of the ordinance," **Hernandez** said.

County Attorney R. David Ware did not return messages from The Atlanta Journal-Constitution inquiring about the issue. The judge's ruling arose from a First Amendment lawsuit filed by a group of clubs in 2001 that challenged the county's revved-up regulation of nude dancing as a prior restraint on free speech, part of a larger battle being waged throughout metro in both state and federal courts. The clubs won the 2001 case in U.S. District Court. It was reversed on appeal, and then it was sent back to District Court. In November 2010, Senior U.S. District Judge Robert Vining ruled that the code illegally put the clubs through a bureaucratic wringer, making them wait indefinitely for approval from police, fire and building departments. While Vining withheld judgment on whether the fees were too high, he did say that if sections of the ordinance don't hold up, none of it can stand. "Judge Vining has said that we don't have an ordinance," Cline said. "Unless they appeal, then there's no ordinance unless they go back and pass one."

But starting Feb. 1, the county will raise the cost of an adult entertainment license from \$6,000 to \$6,400 and annual license renewal from \$4,000 to \$4,300. Employee permits will rise from \$300 to \$325, permit renewals from \$50 to \$100, employee background checks from \$50 to \$55 and fire inspections from \$30 to \$75. The increases are expected to generate an additional \$11,590 per year. Cary Wiggins, an attorney for Fannie's Cabaret, said that since nude dancing is protected speech, a county's licensing fees can be no more than the cost of regulation. He said

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there is no evidence that nude bars cause any more problems for police than regular bars, and he doesn't see how Fulton can charge \$4,000 to renew a license, much less \$4,300. "I'm just unaware of any evidence justifying a rate hike," Wiggins said.

The third club off Fulton Industrial, Club Babe's, isn't taking part in the lawsuit. Managers at all three declined interview requests. Wiggins also represents two Sandy Springs clubs that, while no longer in unincorporated Fulton, are seeking back compensation from the period before Sandy Springs became a city. As with the state government and other local jurisdictions, the Fulton fee hikes are part of a strategy to make up for declining revenue without burdening property-tax payers. **Hernandez** said he is also trying to recover costs and adjust an array of charges, many of which haven't changed in five years, for inflation. North Fulton Commissioner Liz Hausmann cast the sole dissenting vote Wednesday. She told the AJC that she opposes raising any fees or taxes in this economy without reducing spending. She said she wasn't aware of the strip club issue.

The Atlanta Journal-Constitution (GA)
May 17, 2010

County Targets Image Change
Campaign is to Clean up Fulton Industrial
Code Enforcers, Police Start out Cracking Down on Boulevard's Motels
Author: *Steve Visse*

Fulton County has an image problem with its huge warehouse district: Its legitimate economic opportunities sometimes have been overshadowed by its undesirable qualities. This has caused companies to bypass it and take their business across the Chattahoochee River to Cobb and Douglas counties, or get out of Fulton and relocate. "We have had tenants who have been there for years and years and who decided to move across the river," said Tom Flanigan, ING Clarion asset manager. "I don't think it was taxes." To attract new business and keep what it has, Fulton is pushing a campaign designed to clean up what it says is the 10 percent of Fulton Industrial Boulevard that gives the rest of it a bad name. For starters, code enforcers and police have targeted motels that allegedly were centers for sex and drug trades; three were closed for health and safety violations, and a fourth was sold to a new owner, who refurbished the property and secured a Days Inn franchise.

The new motel has posted rules in the lobby banning unregistered guests from rooms and requiring identification to reserve a room as a customer. "We got rid of a hub of criminal activity," said Tom Phillips, county code enforcement administrator. "You can walk in there now and say, 'I can stay here.' Two years ago you wouldn't have said that. You might not even have walked in there." At its last meeting, the County Commission banned truck drivers from parking their big rigs in vacant lots off the boulevard and using them as unofficial truck stops. "Truck stops, as you know, have a link to prostitution," Phillips said. Even strip clubs such as Fannies' Cabaret are seeking a more orderly boulevard. Fannies' is trying to distance itself from prostitution, specifically the hookers who regularly have solicited the club's clientele when arriving and leaving. The club hired security to run them off. "It didn't used to be this way 15 years ago," said Thomas Madden, Fannies' Cabaret general manager.

Police have cracked down, making 107 prostitution arrests in the past two years compared to 41 in the three previous years, according to county statistics. The county is committed to restoring a clean-cut image to the boulevard's seven-mile roadway that runs from Fulton County Airport at Charlie Brown Field to Campbellton Road in south Fulton, according to Deputy County Manager **Rob Hernandez**.

The area has 89 million square feet of warehouse and commercial space but a county study released in March showed that several buildings and warehouses, developed in the 1960s and 1970s, are practically unusable. Seven properties are listed on the Georgia Hazardous Site Inventory, including five for the presence of cancer-causing vinyl chloride. Noting its potential, the study described the boulevard as potentially one of the largest and most prestigious warehousing and transportation hubs east of the Mississippi River. "Today it may still be the largest, but it has lost much of its prestige," the report concluded. Last month, the county used

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

the area blight and vacant warehouses to have the district reclassified as an opportunity zone urban redevelopment area. That allows it to borrow \$26 million from a federal bond program and give employers a \$3,500 tax credit for each new job for 10 years. **Hernandez** said the county wants to use the bond money to install crime surveillance cameras in the area. A \$100,000 federal grant already was secured to increase police patrols and hire seven officers specific for south Fulton. "We're serious about this," **Hernandez** said. "We have put together everything we have available in our tool box to assist Fulton Industrial."

Satellite offices for county services and commissioners Emma Darnell and Bill Edwards have been set up to show the county is committed to improving the area. People have noticed. Companies recently either bought or leased separate industrial properties that cover a combined 260,000 square feet. With upgrades, the area should be able to sell itself. It is located in the center of a metro area that promotes itself as a national transportation hub. Fulton Industrial offers a regional airport and is close to Hartsfield-Jackson International Airport. I-20 is located nearby, as is the Norfolk Southern Intermodal container shipping yard in Austell, an industrial area crisscrossed by railroad tracks.

A next step would be to develop a Community Improvement District, which has happened elsewhere in Fulton and in Cobb, DeKalb and Gwinnett counties. CIDs require commercial property owners to tax themselves to pay for development plans, transportation alternatives and security. Boulevard activists so far have been unable to obtain 51 percent approval of the property owners to install a CID, which increases tax bills by 3 or 4 mills. Yet one man on board with this idea is Madden, the strip club manager, who recognizes that even the adult entertainment business needs better security. "We have to keep it clean here," he said.

The Atlanta Journal-Constitution (GA)
October 9, 2008

Fulton Begins Taking Steps to Aid 911 Center

Author: *D. L. Bennett*

Fulton County has begun making changes that officials hope will improve a 911 center beset by chronic understaffing and dangerous operator errors. By filling 12 vacancies and promising reforms to reduce job-related stress, county officials say they should be able to boost both work quality and employee retention. "We are adamant when we say we are going to solve the problems in the center," said **Roberto Hernandez**, deputy county manager. "Once we know all the facts, we will address it immediately. We will fix it."

Problems at the center that takes emergency calls and dispatches aid were discovered in August when an operator mistakenly sent help to the wrong location for a Johns Creek woman who later died. An Atlanta Journal-Constitution investigation found more than 1,000 write-ups of employees during the past five years for everything from fighting, dispatching mistakes and chronic tardiness to falling asleep on the job. Current and former employees complained that understaffing leads to workers being routinely forced to work 12- and 16-hour days, straining family life and causing conflicts in the center, dispatching and call-taking errors. The inquiry found mistakes that endangered not only callers seeking help but the emergency crews sent to provide aid.

Fulton also has launched three of its own investigations -- one by an outside consultant reviewing center operations, another by police of the incident on Aug. 2 and a third by **Hernandez** and others looking at employee satisfaction issues. Rather than wait for those all to be complete, County Manager Zachary Williams has filled 12 of 33 openings for communications officers and supervisors by reassigning operators who previously provided service for the city of Milton under contract. Milton dispatching is now handled by Alpharetta.

"This definitely should add value and reduce stress on the staff," said Commissioner Lynne Riley, who represents the city of Johns Creek, where Darlene Dukes died Aug. 2. Fulton also has in process two classes of trainees who should be able to fill all the remaining spots, a move he hopes will cut down on stress at the center and reduce conflict and mistakes. Everyone should be on the job within six months, **Hernandez** said.

"We remain committed to excellence in all public safety services, and recognize that 911 operators are the first link in the chain of emergency response," said Williams. "These men and women save lives each day." The auditor's report is now due Nov. 10. The internal probe by police should wrap up this week. **Hernandez** said the committee's work on employee issues is ongoing and its plans address issues like child care for employees who work odd hours and stress management.

The Atlanta Journal-Constitution (GA)
October 5, 2008

Not Enough Workers and a lot of Slack

Author: *Heather Vogell & D. L. Bennett*

A supervisor told 911 worker JoLynn Griffin she didn't have any days left for vacation. The Fulton County emergency center had barely enough workers to cover shifts. But Griffin went on a cruise anyway. She returned to find her job waiting, her personnel file shows, just as it had been when she'd missed work before. Chronic absenteeism and tardiness are among the center's most vexing problems, records and interviews suggest, accounting for roughly a quarter of all personnel infractions and aggravating a staffing shortage that can mean marathon shifts for the dispatchers who do show up. Griffin is one of scores of Fulton 911 employees who racked up roughly 280 sanctions for arriving late or not at all -- often on multiple days -- a database of personnel actions since January 2004 reveals. The problem is likely worse; officials say their data is not comprehensive.

No-shows were counseled, warned and occasionally suspended. But they were rarely fired, data show. Some workers accumulated long disciplinary histories that included 911 call errors as well as absences, and they weren't terminated, according to personnel files. "It appears that certain violations of performance were tolerated or forgiven, for lack of a better word, in order to maintain the staffing required to operate the center," said Lynne Riley, a Fulton commissioner. Losing trained employees wasn't an attractive option for the 911 center. In recent weeks, as many as a third of the center's total positions have sat vacant. Deputy County Manager **Rob Hernandez** said staffing shortages are common at 911 centers, but Fulton's center needs to train more new workers and improve retention. A county consultant should address discipline problems such as absenteeism, he said. "In general, discipline was used like a tool -- a management tool -- rather than as a last resort," he said. "It may have lost its intended effect."

Data show at least eight 911 workers have been sanctioned 10 or more times for playing hooky or walking in late since 2004. Migraines, oversleeping and not feeling well were regular excuses, files say. Employees also blamed a pet illness, panic attack, traffic, getting back in town late, driving a child to school, car problems and a broken toilet. Even current center director Crystal Williams has filed her share of tardy slips, records show, citing late starts, trouble finding parking, feeling ill and, on at least three days, alarm clock malfunctions. Reached by phone, she declined to comment. Former 911 center employees said chronic tardiness and absenteeism led to feuding among staffers. Cassandra Eloi said that during her year at the center it was common to be held over for extra work because others failed to show. Those who did come in often worked 12 to 16 hours straight, she said. "You are running a 911 center on minimal staffing every day," said Eloi, who was fired for being rude to callers. "You have calls holding. You have calls dropping, every day."

Griffin left without permission for the cruise and two other short vacations between September 2003 and March 2004 -- in addition to taking dozens of sick days and showing up late at least 14 times, records show. Alfred "Rocky" Moore, the center's director at the time, wrote in a March

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(Articles are in reverse chronological order)

2004 letter that he was considering dismissing her. "Your personal vacation [cruise] did not justify an emergency vacation," he wrote. But Griffin hung on, volunteering for a demotion instead. Her tardiness continued. One night in January 2006, the call center sent a Fulton sheriff's car to pick her up for work because she had car trouble, records show. Later that year, she was suspended after supervisors said an error she made delayed response to a fire call. She took disability retirement in mid-2007.

Griffin, a 23-year center veteran who was called "an excellent supervisor" in a 1995 job review, said in an interview she disputes that she caused a delay on the fire call, or that her unpaid leave resulted in a staffing shortage that couldn't be covered. She said she was singled out for infractions that others -- including supervisors -- also committed. She felt Moore had a grudge against her. "There was no reason to deny me," Griffin said of her vacation requests. "It's not like I didn't do my share of covering for people, either."

Other workers also complained discipline was not handed out evenly. "There are subjects who manage to be sick every payday weekend and never receive any type of discipline from your same staff," communications officer Francesca Pearson wrote in an April memo to Moore. Pearson could not be reached for comment for this article. Morale was low. After a supervisor threatened one employee with suspension for tardiness, she responded: "go ahead and suspend me that's one less day that I have to work here," a note in her personnel file said. Moore, who was reassigned, did not return three phone messages seeking comment.

The 911 center hasn't lacked the money to fill vacancies. For the past three years, the center -- funded by fees tacked onto phone bills -- has ended the year with excess cash in its salary account, records show. In 2007, it finished nearly \$1 million richer than it started. Instead, **Hernandez** said the center appears unable to keep up with attrition. Some drop out during the intense six-month training period. Others start but find the pressure and night shifts unworkable. Child care and worries about job security as some cities encroach on Fulton's call territory are also factors, he said. He said he does not want to second-guess center managers on their handling of absent employees. But it is a serious problem. "I know my boss would consider that to be job abandonment," he said.

Data analysts John Perry and Megan Clarke and staff writer Cameron McWhirter contributed to this article. 32 emergency calls delayed. Six of those calls were delayed more than 20 minutes. * 23 instances of employees being orally abusive, fighting, being unprofessional or disruptive in the call center. 34 write-ups for poor customer service. 9 instances of dispatchers sleeping on duty. 280 write-ups of not showing up to work or showing up late. 147 write-ups for not meeting monthly standards for speed and safety by the department.

* Numbers based on a review of the incomplete database of disciplinary actions against employees at Fulton County's 911 center.

Sun Sentinel - Fort Lauderdale (FL)
April 29, 1997

Conditions for Planned Shelter don's Allay Fears

Author: *Robin Benedick*

No matter how many conditions the city puts on the proposed homeless shelter on West Sunrise Boulevard, they won't appease nearby property owners who worry about transients congregating near their homes, businesses and public parks. "Those conditions won't keep vagrants from wandering around the neighborhoods," said Fort Lauderdale Vice Mayor Tim Smith, who is among the shelter's harshest critics. "Unless there are incredibly stringent rules that you can only go in by vehicle and leave by bus, that neighborhood is going to be overrun."

Smith and neighborhood leaders are hoping to derail Broward County's plans for a \$7.7 million shelter at 600 W. Sunrise Blvd. Their first chance comes at a special meeting of the city Planning and Zoning Board at 6:30 p.m. Wednesday at City Hall, 100 N. Andrews Ave. The board's recommendation goes to city commissioners for hearings. One of the conditions the city wants to put on the proposed 200-bed homeless assistance center is that it accept no walk-ins - only tenants who are referred there by an agency or police. That means homeless people now accustomed to staying the night at Tent City, the dingy open-air camp in a downtown parking lot, won't get into the new shelter without referrals.

Opponents are pushing the planning board to delay approval until Broward hires a not-for-profit group to run the center and community leaders raise \$3 million in private donations for the project. The shelter is expected to be completed in 18 months once city approvals are granted. Broward County's architect, Edward Seymour, has designed a two-story shelter patterned after one in Miami. The building would face Sunrise Boulevard, but entrances and parking would be at Northwest Sixth and Seventh avenues. The fenced campus would have separate men's and women's dormitories with room for families, classrooms, a medical clinic, day-care center, dining hall and courtyard.

City planners are recommending approval with these conditions:

- Availability: Center must give priority to Fort Lauderdale's homeless who are within two miles of the center.
- Security: Center must pay for 24-hour security inside and outside the campus.
- Curfew: Center must require tenants to be inside from 8 p.m. to 7 a.m. daily. Exceptions would be made for school or work.
- No walk-ins: Center must not accept people without a referral. Center also must establish a no-loitering policy on the property and post signs.
- Citizen board: Center must set up a neighborhood advisory board.

County officials said they were designing a shelter that wouldn't be a magnet for uninvited homeless people. "The word will quickly get out among the homeless that this facility does not accept walk-ins," said **Rob Hernandez**, Broward County's assistant director of Human Services. With more than 5,000 homeless people in Broward, the shelter is billed as the first of several to

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

address a growing problem that could get worse under new federal and state welfare reforms. Homeless advocates worry that police will enforce trespassing and other city laws too eagerly to chase transients from public places. "Being homeless is not a crime and it shouldn't be that they go to jail for that," said Dianne Sepielli, a member of the county's homeless advisory board.

Sun Sentinel - Fort Lauderdale (FL)
March 13, 1994

New Refugees like Broward Cuban Immigrants Find more Opportunities, Less Congestion

Author: *Lyda Longa*

When Geovanny Montes de Oca and 11 of his friends set sail from Havana for the United States aboard a rubber raft in October, Montes de Oca's friends couldn't stop talking about Miami. But after the men were rescued by the U.S. Coast Guard and taken to Key West, Montes de Oca set his sights on a different place: Broward County. His relatives had described Broward as an area where plenty of opportunities could be found. "I like Miami, but up here, there's less congestion and life is more relaxed," Montes de Oca said in Spanish. "I love it here because I'm learning English, I have a job and I even got a car," he said. Montes de Oca works at the Fort Lauderdale-Hollywood International Airport's catering service. Montes de Oca, who lives with friends in west Hollywood, is not alone. In the past six months, a colony of about 50 or 60 Cuban rafters has taken root in Hollywood and Fort Lauderdale.

The reason is simple: The rafters believe that employment and housing are easier to get in Broward than in Dade County. Historically, rafters have flocked to Dade County because they felt more comfortable among their Cuban countrymen, said **Roberto Hernandez**, executive director of Hispanic Unity of Florida. But that's changing. "Lately, the rafters have learned that in Broward there is less congestion and a better chance of finding a job," **Hernandez** said. "Many of them also have friends and family in the area who have told them that Broward County has less Hispanics and less competition for work."

According to the 1990 U.S. Census, there were roughly 109,000 Hispanics in Broward County compared to almost 1 million in Dade. Of those, there were 24,000 Cubans in Broward and almost 570,000 Cubans in Dade. Hector Nodarse, 29, heard about Broward County when he was still in Havana earlier this year. Nodarse was a sound technician with El Ballet Nacional de Cuba - the Cuban National Ballet. "I like the hustle and bustle of Miami because it reminds me of Havana, but I already have a job here {in Broward}," Nodarse said. "Broward is a little too quiet for me, but I'll get used to it."

Brothers Roberto and Raydel Rivera of Dania are two more Cuban rafters who ended up in Broward. The Riveras arrived in Miami aboard a rubber raft in December; they came from the Cuban port town of Mariel. Both are learning English at a night school in Hollywood. "I lived in Miami for about a month before I came to Dania, and I tell you life is better here," Roberto Rivera, 22, said in Spanish. "I'm learning English, I just got my driver's license and soon, I know I'll have a job. Once I get that I'll get my own apartment. Life is good here."

Internet – Newspaper Archives Searches
Roberto Hernandez
(Articles are in reverse chronological order)

Sun Sentinel - Fort Lauderdale (FL)
February 22, 1994

Planned Center may Help Elderly Hispanics

Author: *Lyda Longa*

Inez Carrascillo is an elderly Hispanic woman who wants somebody to talk to. When you're 76 and the only language you speak is Spanish, it's hard to make friends in a neighborhood filled mostly with young working Anglos. Soon, Carrascillo, who is Cuban, and other elderly Hispanics in Broward County could have a place to spend time together, working on arts and crafts and chatting in Spanish.

Roberto Hernandez, director of Hispanic Unity of Broward, said he hopes to open the county's first senior center for Hispanics in the next few months. The proposed center, which would be in Hollywood, would provide activities, meals, transportation and companionship for Broward Hispanics over 60. The 1990 U.S. Census estimated there were 11,891 elderly Hispanics in the county. "There is no single place in Broward County where elderly Hispanic people can go just to talk and relax with their peers," **Hernandez** said. "When you reach a certain age, you want to be with other people who share a similar culture and can understand you."

Hernandez, 27, has applied for a \$100,000 county grant that would pay for four full-time employees for the planned center. Last year he purchased a 7,000-square-foot building at 5840 Johnson St. for the center with the help of a grant from the city of Hollywood. Edith Lederberg, executive director of the Area Agency on Aging, said she has promised **Hernandez** that her organization would provide meals for the center once it opens.

Although there are a handful of senior centers scattered throughout the county, Lederberg and other social service officials agree that none cater specifically to Broward's Hispanic elderly. "We have several senior centers throughout the county, but elderly Hispanic people won't go there because they feel uncomfortable and out of place," Lederberg said.

That feeling is not limited to elderly Hispanic people. Gema **Hernandez**, a sociologist and associate professor at Nova University's School of Business, said the sentiment is shared by most elderly people of varying ethnic backgrounds. "As we age, most of us have a need to return to our ethnic roots," **Hernandez** said. Carrascillo, who stays alone during the day in her west Hollywood home while her daughter and grandchildren go to work and school, said she needs someone to interact with during those long hours.

Research Compiled by: Amanda Dillabough
 Colin Baenziger & Associates

Appendix D

Sample Survey ***Savannah City Manager Quality Survey***

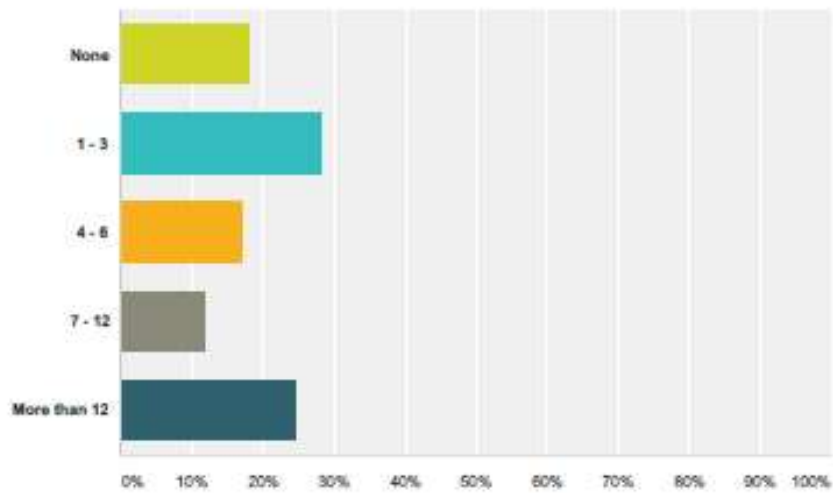
Sample City Manager Quality Survey

Savannah City Manager Quality Survey

SurveyMonkey

Q1 During the past three years, how often have you attended or viewed a city council or city commission meeting (select only one)

Answered: 449 Skipped: 1



Answer Choices	Responses
None	18.26% 82
1 - 3	28.29% 127
4 - 6	16.93% 76
7 - 12	11.80% 53
More than 12	24.72% 111
Total	449

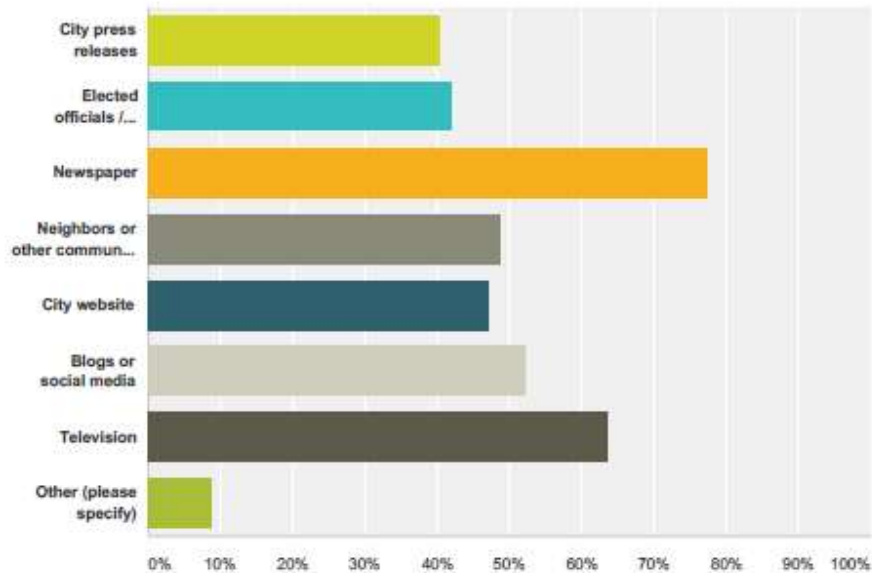
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q2 How do you keep informed of City issues and concerns (select all that apply)

Answered: 450 Skipped: 0



Answer Choices	Responses	
City press releases	40.22%	181
Elected officials / city staff	42.00%	189
Newspaper	77.56%	349
Neighbors or other community members	48.67%	219
City website	47.11%	212
Blogs or social media	52.22%	235
Television	63.78%	287
Other (please specify)	8.67%	39
Total Respondents: 450		

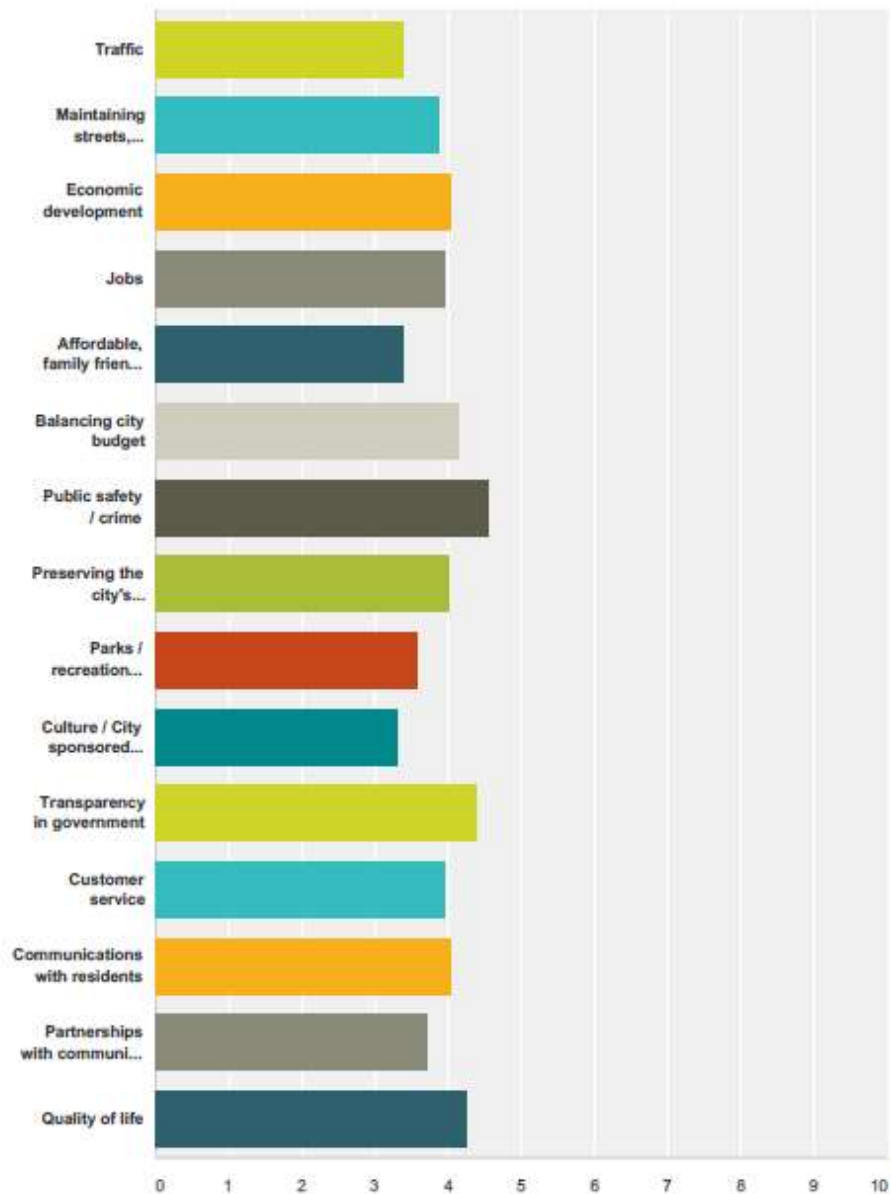
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q3 Please rank each of the following issues that the City Manager should address (5 being the most important and 1 as not important)

Answered: 448 Skipped: 2



Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey							SurveyMonkey	
Traffic	6.59%	12.47%	35.06%	24.00%	21.41%	0.47%	425	3.41
	28	53	149	102	91	2		
Maintaining streets, buildings, and other public facilities	2.30%	7.36%	23.22%	33.79%	32.64%	0.69%	435	3.68
	10	32	101	147	142	3		
Economic development	6.19%	6.42%	13.76%	22.25%	48.85%	2.52%	436	4.04
	27	28	60	97	213	11		
Jobs	5.61%	7.71%	16.82%	22.68%	44.86%	2.34%	428	3.96
	24	33	72	97	192	10		
Affordable, family friendly housing	10.39%	13.39%	28.41%	19.40%	27.48%	0.92%	433	3.41
	45	58	123	84	119	4		
Balancing city budget	3.63%	5.22%	13.83%	27.89%	47.62%	1.81%	441	4.13
	16	23	61	123	210	8		
Public safety / crime	3.83%	2.03%	5.63%	10.36%	74.77%	3.38%	444	4.55
	17	9	25	46	332	15		
Preserving the city's character	5.68%	5.68%	17.50%	23.41%	46.36%	1.36%	440	4.00
	25	25	77	103	204	6		
Parks / recreation programs	3.90%	7.57%	33.94%	32.11%	21.56%	0.92%	436	3.60
	17	33	148	140	94	4		
Culture / City sponsored events	7.74%	12.98%	35.99%	28.02%	14.81%	0.46%	439	3.29
	34	57	156	123	65	2		
Transparency in government	3.61%	2.71%	10.84%	14.67%	65.24%	2.93%	443	4.39
	16	12	48	65	289	13		
Customer service	4.52%	6.79%	20.59%	24.89%	42.31%	0.90%	442	3.95
	20	30	91	110	187	4		
Communications with residents	4.31%	4.76%	18.37%	26.53%	44.90%	1.13%	441	4.04
	19	21	61	117	198	5		
Partnerships with community / schools / business	8.18%	8.41%	22.50%	24.32%	35.68%	0.91%	440	3.72
	36	37	99	107	157	4		
Quality of life	4.56%	2.96%	12.07%	20.96%	56.72%	2.73%	439	4.26
	20	13	53	92	249	12		

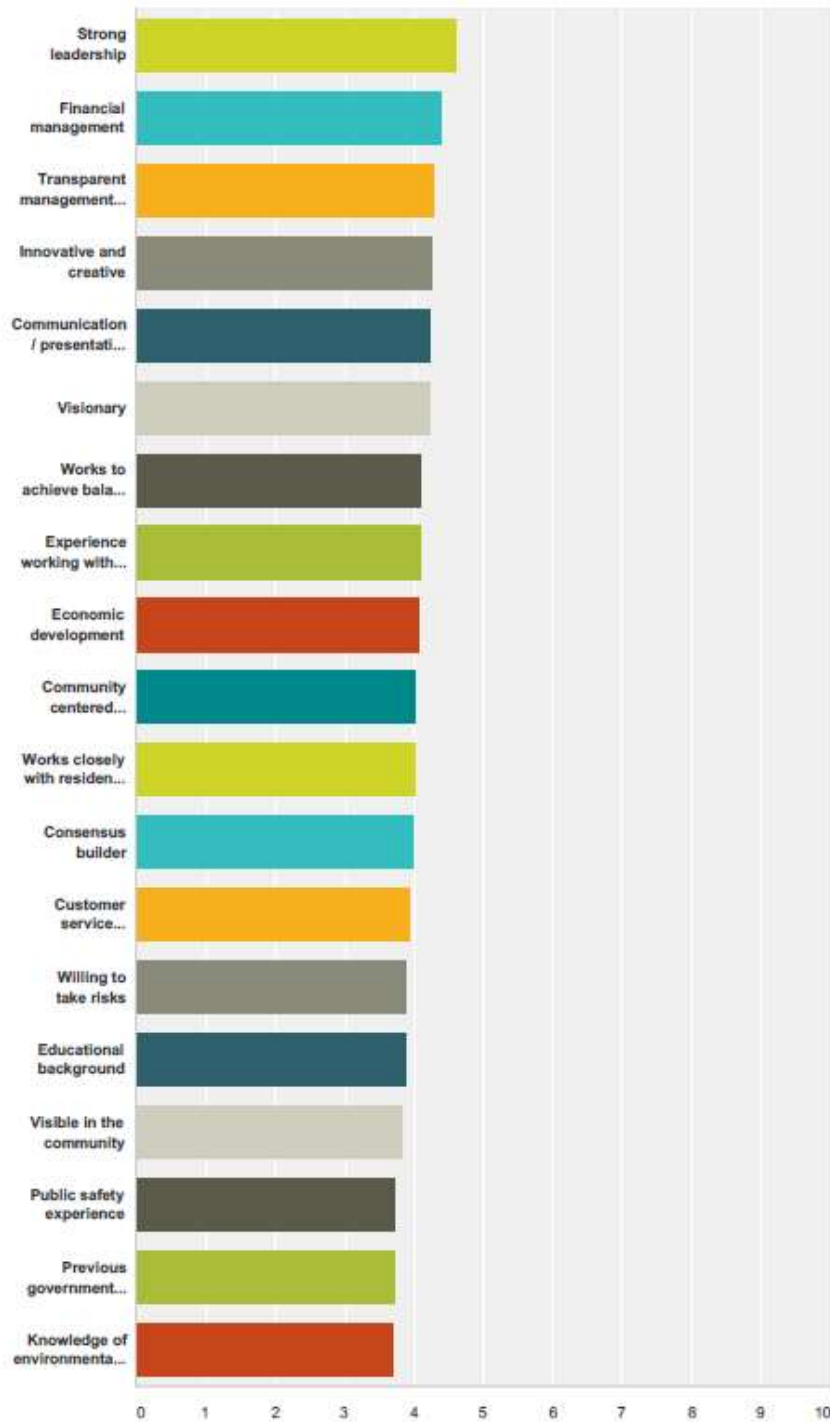
Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

Q4 Please rank each of the following skills the next City Manager should have (5 being the most important and 1 as not important)

Answered: 449 Skipped: 1



Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

	1	2	3	4	5	N/A	Total	Weighted Average
Strong leadership	4.51% 20	1.13% 5	3.39% 15	10.61% 47	79.01% 350	1.35% 6	443	4.61
Financial management	3.38% 15	3.15% 14	8.33% 37	20.72% 92	63.06% 280	1.35% 6	444	4.39
Transparent management style	3.83% 17	2.25% 10	13.06% 58	20.50% 91	58.78% 261	1.58% 7	444	4.30
Innovative and creative	4.10% 18	2.28% 10	14.81% 65	20.27% 89	57.86% 254	0.68% 3	439	4.26
Communication / presentation skills	3.62% 16	3.39% 15	13.12% 58	25.57% 113	53.62% 237	0.68% 3	442	4.23
Visionary	5.22% 23	2.95% 13	12.70% 56	20.63% 91	57.37% 253	1.13% 5	441	4.23
Works to achieve balance among all community interests: residents, businesses and developers	2.95% 13	6.35% 28	15.19% 67	26.98% 119	47.39% 209	1.13% 5	441	4.11
Experience working with diverse communities	6.07% 27	5.39% 24	14.16% 63	21.12% 94	52.36% 233	0.90% 4	445	4.09
Economic development	4.57% 20	5.25% 23	14.16% 62	28.54% 125	45.89% 201	1.60% 7	438	4.08
Community centered approach	4.78% 21	5.01% 22	17.31% 76	27.56% 121	44.65% 196	0.68% 3	439	4.03
Works closely with residents and seeks their viewpoint	4.08% 18	4.31% 19	17.46% 77	31.75% 140	41.72% 184	0.68% 3	441	4.03
Consensus builder	4.31% 19	6.12% 27	20.63% 91	24.04% 106	43.54% 192	1.36% 6	441	3.98
Customer service orientation	5.24% 23	5.92% 26	18.00% 79	28.93% 127	41.00% 180	0.91% 4	439	3.95
Willing to take risks	5.25% 23	5.02% 22	23.74% 104	26.26% 115	38.81% 170	0.91% 4	438	3.89
Educational background	3.64% 16	7.05% 31	22.95% 101	27.05% 119	37.27% 164	2.05% 9	440	3.89
Visible in the community	4.58% 20	7.09% 31	24.71% 108	26.32% 115	36.61% 160	0.69% 3	437	3.84
Public safety experience	4.49% 20	8.31% 37	26.97% 120	27.42% 122	31.69% 141	1.12% 5	445	3.74
Previous government experience	8.07% 36	7.17% 32	24.22% 106	23.54% 105	35.43% 158	1.57% 7	446	3.72
Knowledge of environmental issues	7.06% 31	8.43% 37	25.28% 111	24.83% 109	33.26% 146	1.14% 5	439	3.70

Sample City Manager Quality Survey (continued)

Savannah City Manager Quality Survey

SurveyMonkey

**Q5 Is there anything else you want to share
about what you would like to see in our next
City Manager?**

Answered: 230 Skipped: 220

Put the NEEDS of residents of the City of Savannah FIRST! Before the tourists, the business developers, etc.
A dedication to addressing the gun violence in our city.
More visibility to the community as a whole including the unincorporated areas, not just to specific groups.
Interest in building a bike and pedestrian friendly city.
A major interest in the environment and sustainability of it.
A familiarity with and support for Complete Streets.
Good working relationship with citizens and police. Ability to work to preserve neighborhoods. Savannah is not just for tourists!
Highly ethical business practices. High moral values and integrity. Verifiable track record of previous accomplishments in government or business.
Increasing mobility using plans like "Complete Streets". Making public transportation available for all in getting around the city (shuttles); making it safe for biking; better recycling agenda (they're composting in San Francisco these days).
I'd like to see the City Manager riding his bike to work or walking to work and incorporate a plan to always include sidewalks and bike paths in infrastructure for existing and especially for new development.
Someone who will place traffic calming and safe streets as a top priority. We have virtually no traffic enforcement (60 mph on E 52nd, my street, is not uncommon and there is NO police enforcement).
We need to start making Savannah A Bike City friendly and make better changes for cyclists safety , so that we won't have another horrible accident like on BRAG again.
Commitment to transportation issues in traffic calming through downtown for pedestrians, bicycles, cars (speeding) and public transportation. Too many accidents, by any of these modes of transportation, are completely avoidable or at least able to be lessened by enforcement of existing laws or the development of prevention measures.
Focus on the planning, development and maintenance of complete streets.
Previous experience in a city with similar challenges would be ideal, along with a demonstrated ability to manage large public projects from start to finish.
He or she must be someone the city staff will respect and find good to work for. I guess this is having the skills that most employees like to see in their employer. The new City Manager should also have skills in delegating responsibility and giving credit to others for their successes.

*16 samples responses from the 230 received.

Appendix E

St. Johns County, FL Resolution Thanking CB&A for Its Outstanding Service

RESOLUTION NO. 2007-23

**A RESOLUTION OF THE COUNTY COMMISSION
OF ST. JOHNS COUNTY, FLORIDA, THANKING
COLIN BAENZIGER & ASSOCIATES FOR ITS
OUTSTANDING EFFORTS IN CONDUCTING THE
EXECUTIVE SEARCH FOR THE COUNTY'S NEW
ADMINISTRATOR; AND PROVIDING AN
EFFECTIVE DATE.**

WHEREAS, St. Johns County retained Colin Baenziger & Associates (CB&A) to identify and recommend strong candidates to be the County Administrator;

WHEREAS, CB&A's staff worked diligently to find and produce excellent candidates, and then provided the County Commission with comprehensive materials concerning the candidates' aptitude, experience, background, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and newspaper archives of these candidates; and

WHEREAS, CB&A's process was completely open, fair and unbiased and was extremely well received by the County Commission, county staff, the press, and the public; and

WHEREAS, the County Commission wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the county;

**NOW BE IT THEREFORE RESOLVED BY THE COUNTY COMMISSION OF
ST. JOHNS COUNTY, FLORIDA AS FOLLOWS:**

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

Section 2: Acknowledgement. The County Commission wishes to express its sincere appreciation and gratitude to Colin Baenziger & Associates for its outstanding work and effort in assisting the county in finding its County Administrator.

Section 3: Effective Date. This resolution shall take effect immediately upon adoption.

PASSED AND ADOPTED by the Board of County Commissioners of St. Johns County, Florida, this 21 day of August, 2007.

ATTEST: Cheryl Strickland, Clerk

**BOARD OF COUNTY COMMISSIONERS
ST. JOHNS COUNTY, FLORIDA**

By: Pam Halterman
Deputy Clerk

By: Ben Rich
Ben Rich, Chairman

Rendition Date: 8/23/07



Appendix F

Comments from Dale Martin on CB&A's Vetting Process

Weekly comments from Dale Martin

By Dale Martin, City Manager, City of Fernandina Beach

March 18, 2016 1:00 a.m.

The vetting process employed by Mr. Colin Baenziger following my application to the City of Fernandina Beach was the most thorough review of my career, credentials, and references that I have ever experienced. In the months leading to my appointment here, I was interviewed in several other communities for similar City Manager positions. Despite getting to the interview stage in those communities, none of my references ever indicated to me that they had been contacted. As part of the selection process here, I was required to provide an exhaustive list of references, some very specific, such as my current Town Attorney, auditor, Chamber of Commerce, etc. To the best of my knowledge, every single reference provided was contacted.

The historic information provided to the City Commission for each candidate was extensive. Reading through the older newspaper articles rekindled so many memories- the personalities and issues from earlier days illustrate some peaks and valleys over the past twenty years. It has been a wonderful ride.

Note: Mr. Martin reminisces about his career for the remainder of the article. The full article can be found at:

<http://fernandinaobserver.com/2016/03/18/weekly-comments-from-dale-martin-5/#more-65218>



City of Port Orange, Florida

RFP #21-05

Proposal to provide executive search services for the selection of a City Manager

December 10, 2020



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Baker Tilly US, LLP, trading as Baker Tilly, is a member of the global network of Baker Tilly International Ltd., the members of which are separate and independent legal entities.



Statement of interest

December 10, 2020

Mr. Jim Tillman, CPPO, C.P.M.
Purchasing Manager
City of Port Orange City Clerk's Office
1000 City Center Circle
Port Orange, FL 32129

RE: RFP #21-05 – Executive Search Services

Dear Mr. Tillman:

Baker Tilly US, LLP (Baker Tilly) appreciates the opportunity to submit the following proposal for executive recruitment services to the City of Port Orange (City) to help you identify your next City Manager. We believe that our record of successfully placing qualified and very accomplished professionals, along with our extensive experience providing executive recruitment services to cities, counties and other public-sector organizations nationwide, will be beneficial for your recruitment and will allow us to find the candidate who has the traits, skills, experience and overall competence you desire for your organization.

We know that you have options when it comes to selecting a recruitment firm. However, we believe that our unique approach, highly regarded customer service practices, and our record of identifying and recruiting top level executives in similar roles, sets us apart from our competitors. Additionally, we offer the following unique features:

- **Customized profile development:** working with the members of the City Council and designated staff, we develop a customized candidate profile based on the required, desired and preferred qualifications, traits and attributes you seek in the individual you interview or hire for your next City Manager. We strive to understand how the City's current and anticipated needs and organizational priorities will shape your recruiting and selection requirements; then we collaborate with you to develop a nationwide or regional marketing, recruiting and outreach campaign. This approach has proven to effectively allow us to identify, attract and recruit highly qualified candidates for your review.
- **Proprietary management/leadership assessment:** relying on exclusively licensed predictive analytics tools (using data to determine patterns and forecast future outcomes and trends), we administer assessments to selected applicants to help us identify human potential in each of the candidates we present to you. Results are "Real," "Impactful," and "Powerful." Furthermore, these results can provide you with more profound insights into the candidate's management traits and leadership styles based on scientific data.
- **Recorded video interviews:** we ask selected candidates (semi-finalists) to complete a recorded, one-way video interview, using questions developed from your "candidate profile," which gives your review team an additional tool to evaluate the semi-finalists before inviting them to a face-to-face interview.
- **Proprietary online application management:** our exclusively licensed, proprietary online application system enables us to efficiently manage applicant flow, classification and allows us to communicate with each applicant quickly and effectively. We communicate in real time with applicants, thereby engaging and informing them of each step, search related assignment and corresponding timeline throughout the process. Our system also allows us to access, review and evaluate thousands of prior applicants or

individuals who have manifested interest in similar positions. Generally, these are individuals who may not be actively seeking a job, but who may be open to “the right opportunity.” This is another benefit and advantage we provide to our clients, which enables us to access a larger number of active and passive job seekers.

This proposal details about our approach, expertise, references and pricing for this executive recruitment. Our team would consider it a professional privilege to provide these services to the City of Port Orange.

Very truly yours,

BAKER TILLY US, LLP

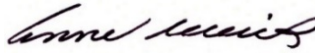


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Project Team Leader

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Company history, qualifications, ability and capacity

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Plano, TX 75093

Telephone number and e-mail address

+1 (972) 748 0300
Executive.Recruitment@bakertilly.com

State of incorporation of the entity

Baker Tilly US, LLP is registered in the States of Illinois and Wisconsin.

Names and addresses of our Board of Partners

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Current and previous projects of similar work

Baker Tilly has conducted more than 20 executive searches for Florida public sector clients. The following is a list of executive searches recently conducted by members of the Baker Tilly team.

List of relevant projects: 2016 – present

Year	Client	State	Project	Population
Current	Athens	TX	City Manager	12,797
Current	Corpus Christi	TX	Assistant City Manager	323,733
Current	Maple Plain	MN	City Administrator	1,807
2020	Boone County	IL	County Administrator	53,513
2020	Eau Claire	WI	City Manager	68,866
2020	Fairmont	MN	City Administrator	10,126
2020	Front Royal	VA	Town Manager	15,239
2020	Goochland County	VA	County Administrator	23,753
2020	Herington	KS	City Manager	2,304
2020	Kansas City	MO	City Manager	488,943
2020	Lake Ozark	MO	Asst City Admin/Community Econ Dev Dir	1,792
2020	Matanuska-Susitna Borough	AK	Borough Manager	108,317
2020	Missouri City	TX	City Manager	74,705
2020	Moose Lake	MN	City Administrator	2,798
2020	Oakdale	MN	City Administrator	28,083
2020	Rochester	MN	City Administrator	114,011
2020	Scottsbluff	NE	City Manager	14,874
2020	Shakopee Public Utilities Commission	MN	Director of Finance and Administration	
2020	St. Joseph	MO	City Manager	74,959
2019	Becker County	MN	County Administrator	32,504
2019	Beeville	TX	City Manager	12,937
2019	Cloquet	MN	City Administrator	11,938
2019	Commonwealth of Virginia	VA	Chief Operating Officer	8,326,000
2019	Hobbs	NM	City Manager	37,764
2019	Lake Lotawana	MO	City Administrator	2,099
2019	Middleburg Community Charter Schools	VA	Principal	
2019	Norman	OK	City Manager	122,843

Company history, qualifications, ability and capacity

List of relevant projects: 2016 – present

Year	Client	State	Project	Population
2019	Paris	TX	City Manager	24,800
2019	Park City	KS	City Administrator	7,499
2019	Polk County	WI	County Administrator (Partial Search)	43,476
2019	Port Arthur	TX	City Manager	53,937
2019	Willmar	MN	City Administrator	19,628
2018	Addison	TX	City Manager	15,368
2018	Asheville	NC	City Manager	89,121
2018	Ashland	OR	City Administrator	21,636
2018	Avondale	AZ	City Manager	82,881
2018	Belle Plaine	MN	City Administrator	6,838
2018	Billings	MT	City Administrator	110,323
2018	Burnsville	MN	City Manager	61,434
2018	Christiansburg	VA	Town Manager	21,533
2018	Grand Rapids	MI	City Manager	192,294
2018	Herington	KS	City Manager	2,362
2018	James City County	VA	County Administrator	73,147
2018	Kingman	AZ	City Manager	29,029
2018	Lancaster County	SC	Assistant County Administrator	80,458
2018	Maricopa	AZ	City Manager	46,903
2018	Middleburg	VA	Town Administrator	828
2018	Mora	MN	City Administrator/Public Utilities GM	3,453
2018	Pinellas County	FL	County Administrator	929,048
2018	Ramsey County	MN	County Manager	538,133
2018	Salina	KS	City Manager	46,994
2018	Shawnee	KS	City Manager	64,323
2018	Surry County	VA	County Administrator	6,706
2018	York	PA	Business Administrator	43,859
2017	Albemarle County	VA	County Executive	103,000
2017	Berthoud	CO	Town Administrator	5,807
2017	Chippewa County	WI	County Administrator	63,132
2017	Christiansburg	VA	Town Manager	21,533
2017	Cloquet	MN	City Administrator	11,938
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
2017	Littleton	CO	City Manager	44,275
2017	Manassas Park	VA	City Manager	16,149

Company history, qualifications, ability and capacity

List of relevant projects: 2016 – present

Year	Client	State	Project	Population
2017	Manatee County	FL	County Administrator	342,106
2017	Menominee County	MI	County Administrator	23,548
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	Swift County	MN	County Administrator	9,546
2017	Township of Roxbury	NJ	Township Manager	23,324
2016	Brooklyn Center	MN	Deputy City Manager	31,006
2016	Cary	NC	Town Manager	151,088
2016	Catawba County	NC	County Manager	154,810
2016	Charter Township of Kalamazoo	MI	Township Manager	20,918
2016	Chesterfield County	VA	County Administrator	327,745
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	Dakota County	MN	County Manager	408,509
2016	Deerfield Beach	FL	Assistant City Manager	78,041
2016	Denton	TX	City Manager	123,099
2016	Dumfries	VA	Town Manager	5,168
2016	Essex County	VA	County Administrator	11,229
2016	Fredericksburg	VA	City Manager	28,132
2016	Goochland County	VA	County Administrator	21,626
2016	Greensboro	NC	Assistant City Manager	279,639
2016	Hayden	CO	Town Manager	1,801
2016	Isle of Wight County	VA	County Administrator	35,656
2016	Jersey Village	TX	City Manager	7,862
2016	King George County	VA	County Administrator	24,926
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	Pittsylvania County	VA	County Administrator	62,426
2016	Roswell	NM	City Manager	48,611
2016	Scott County	IA	County Administrator	170,385

Company history, qualifications, ability and capacity

List of relevant projects: 2016 – present

Year	Client	State	Project	Population
2016	Shakopee	MN	Assistant City Administrator	39,167
2016	Stafford County	VA	County Administrator	136,788
2016	Stafford County	VA	Deputy County Administrator	136,788
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

Current executive searches

The schedule to commence your recruitment coincides with Baker Tilly's completion of other projects. This will ensure that the proposed project team members will be available to concentrate on your recruitment. Baker Tilly is prepared to initiate your project within three weeks after receiving the official notice to proceed and will complete your recruitment within four months.

List of current projects

Client	State	Project	Population
Athens	TX	Police Chief	12,797
Belton	MO	Police Chief	23,480
Corpus Christi	TX	Assistant City Manager	323,733
Corpus Christi	TX	Director of Water Utilities	323,733
Hibbing Public Utilities	MN	General Manager	15,944
Johnson City	TN	Civic Center General Manager	66,778
Maple Plain	MN	City Administrator	1,807
North Texas Municipal Water District	TX	Executive Director/General Manager	
Orange County	NC	Emergency Services Director	140,352
Racine	WI	Police Chief	77,432
Richland County	SC	County Assessor	415,759

Project schedule

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.

City of Port Orange, Florida Executive Recruitment Preliminary Timeline		
The following timeline represents a preliminary schedule for your executive recruitment based on a commencement date of January 15. Actual target dates will be developed in consultation with and approved by the City Council.		
Project Milestone	Deliverables	Target Date
Profile development, advertising and candidate outreach	– Baker Tilly completes interviews to develop candidate profile and recruitment brochure; the City approves ad placement schedule and timeline – Baker Tilly sends draft recruitment brochure to the City – The City returns draft recruitment brochure (with edits) to Baker Tilly – Baker Tilly commences executive recruitment advertising and marketing – Online data collection and profile development	February 26
Applicant screening and assessment and recommendation of semi-finalists	– Baker Tilly commences formal review of applications; most promising candidates complete questionnaires – Candidates complete recorded interview online – Baker Tilly completes formal review of applications and sends selected resumes to the City for review – Candidates' recorded interviews are presented – Baker Tilly meets with the City and recommends semi-finalists; the City selects finalists for on-site interviews – Finalists complete candidate management style assessment and responses are reviewed and interview questions are developed	March 19
Comprehensive background check, academic verifications and reference checks completed for finalists	– Baker Tilly completes reference checks / background checks/ academic verification on finalists	week of April 12
On-site Interviews with finalists	– Baker Tilly sends documentation for finalists to the City – The City conducts on-site interviews with finalists	week of April 26
Employment offer made / accepted	– The City extends employment offer to selected candidate	week of May 3

The location of the office where the work will be performed

Anne Lewis, Director
8219 Leesburg Pike, Suite 800
Tysons, VA 22182
T: +1 (703) 923 8214
M: +1 (540) 476 1905
E: anne.lewis@bakertilly.com

Work plan and process

Our understanding of Port Orange's needs

The recruitment will be national and inclusive in nature, with a candidate pool of diverse, experienced and talented individuals.

We understand the City is looking for a timely, effective, efficient, responsive, well-managed and thorough search process to recruit and identify highly qualified candidates for its next City Manager.

Baker Tilly will work with the City to understand the desired qualities and professional capabilities that are most important to your organization for this recruitment. This information helps us present the City of Port Orange and the vacancy to well-regarded candidates, emphasizing the opportunities for leadership and professional growth as well as presenting the City of Port Orange as a vibrant and thriving community in which to live.

We recognize that there is significant competition for experienced local government managers today. For this reason, we work with you to develop a recruitment strategy that includes an aggressive marketing, recruiting and candidate outreach campaign. As you know, a successful recruitment often depends upon the ability to reach successful executives who may not necessarily be in search of new employment opportunities. Thus, we use existing resources to inform and encourage qualified professionals to apply for opportunities with your organization. We believe that these efforts are critical to ensuring that the City receives a qualified candidate pool.

Baker Tilly manages and tracks applicant information and provides regular communications, updating the applicants on the status of the recruitment. Our communications are always professional and respectful.

We take pride in our ability to provide the City Council with comprehensive information about each candidate we present, expanding beyond applications and resumes, to better understand their professional experience, the leadership and management style they will bring to your organization, and their motivation for pursuing this career opportunity. We also assist you in the preparation of interview questions, interview day scheduling, planning and structuring as needed. Additionally, we are available to you and present throughout each interview session and are able to facilitate your deliberations and negotiations with the top candidate.

Proposed solution to meet Port Orange's needs

The recruitment will be conducted out of our Tysons, Virginia office. Anne Lewis will serve as the project team leader. Our proven process includes five major tasks:

1. Recruitment brochure development and advertising

- We schedule and meet with your City's elected officials, appointed management team members and key stakeholders, as requested, to understand your desired needs, strategic directions, overall candidate expectations and to develop a candidate profile

2. Execution of recruitment strategy and identification of quality candidates

- Using the approved profile, we develop a colorful, appealing brochure and embark on a national or regional targeted recruitment campaign
- Additionally, we simultaneously launch a direct applicant outreach campaign targeting eligible prospects identified via our extensive searchable applicant database
- Using our proprietary applicant tracking system, we communicate and update applicants on key processes and corresponding search progress

3. Screening of applications, recommendation of semi-finalists and selection of finalists

- Once we identify the most promising applicants, we ask them to complete our due diligence questionnaire and a candidate questionnaire while the project team conducts a comprehensive web and social media scan to elicit information that could be relevant to employment
- These applicants also complete a recorded, one-way video interview of selected questions designed to secure a different perspective on the applicant's overall qualifications
- We provide you with a Semi-Finalists Report of the top candidates, which includes resumes, cover letters and due diligence questionnaire responses
- Selected finalists complete a management and leadership style and strengths assessment (personality and behavior analysis) to provide us with important information about their styles, temperament, preference, etc.

4. Conducting background checks (criminal, civil, credit and driving record), reference checks and academic verifications

- Background records checks and academic verification
- References

5. Final interview process

- Once your City Council identifies its top 3-5 finalists, we work with you and the finalists to coordinate all aspects of the interview process
- Employment offer – assistance and feedback

Recruitment solutions during the Covid-19 Pandemic

In response to the COVID-19 Pandemic, the Baker Tilly executive recruitment team leader, Anne Lewis, will work closely with the City's designated point of contact to develop alternative methods to complete all aspects of our established search processes using existing technologies and ensure the overall safety of all involved, which may include virtual or telephonic meetings, interviews, or conversations.

As such, we will creatively collaborate with your organization to provide you with access to critical information you may need to make your hiring decisions. Additionally, we can utilize our capability for video conferencing during meetings, candidate interviews, etc.

When the time arrives for the Mayor and City Council to interview candidates, we may encourage and support the steps established or recommended by local, state or federal guidelines, public health and medical professionals, including social distancing guidelines and protocols

Baker Tilly has successfully organized several successful virtual and on-site interview processes following the prescribed social distancing protocols and best practices. As such, Anne is able to provide corresponding on-site support and assistance, if requested.

Remote work

For Baker Tilly, the safety of our people is paramount. We are committed to playing our part in containing COVID-19 by practicing responsible social distancing. As of this writing, our firm is directing all professionals work remotely. Because Port Orange expects and deserves tailored, personalized service, we recognize that this policy may cause concern. **Please understand that we are prepared to deliver an exceptional service experience remotely if necessary.**

The City's engagement team has various tools enabling them to assist you from any location. Baker Tilly professionals each receive their own laptop and remote access credentials to connect to our internal network from outside the office. When Baker Tilly and the City are not able to meet in person, we have web conferencing software – including Zoom, WebEx and Microsoft Teams – to quickly set up online meetings.

Additionally, we use Huddle, a secure cloud collaboration software, to work together anywhere, anytime and on any device. Huddle provides a platform for the City and Baker Tilly to come together, share files, assign tasks, and track activity in a secure environment. Using Huddle as a central hub of activity means we all spend less time organizing documents, chasing approvals and searching through email – and more time achieving tangible results. The platform also enables real-time communication, meaning the status of your engagement will always be available. We also use Microsoft Teams, which facilitates easier communication and project management.

Recruitment approach

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 your 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 include a profile that captures the essence of the City of Port Orange as a highly-attractive venue for the successful candidate to live and work.

To prepare the recruitment brochure, the project team leader will meet with the City Council and designated staff to discuss the required background, professional experience, and management and leadership characteristics for your City Manager. We meet individually (or collectively depending upon your preference) with members of the City Council to broaden our understanding of the position's leadership and management requirements, current issues, your strategic priorities and your expectations for the City Manager. [See example of a recruitment brochure in [Appendix I.](#)]

Company history, qualifications, ability and capacity

Information obtained from these meetings, coupled with our review of the job description and other City documents, is used to prepare a position and candidate profile. The completed profile will be approved by the City Council before recruitment begins. The position and candidate profile will be central to our recruitment strategy and outreach to potential candidates.

The project team will also work with the City of Port Orange 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, and coordinate with City staff to include information about the search on the City's social media platforms. Additionally, Baker Tilly has a high-traffic website which includes an exclusive location dedicated to encouraging 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 City Manager position.

Advertisements for the City Manager position could be placed with:

International City/County Management Association
National Forum of Black Public Administrators
Hispanic Forum
Careers in Government (careersingovernment.com)
Florida League of Cities
Florida City/County Management Association
LinkedIn
College and University Alumni Networks

Project Milestone	Deliverables	Timeline
Position profile and recruitment brochure development	– Interviews with the City – Baker Tilly receives information on the City's budgets, organizational charts, images, logos, etc. – Develop draft documents (recruitment brochure, advertisement, marketing letter and timeline)	2 Weeks
Approve brochure, commence advertising and distribute marketing letter	– Brochure sent to the City for final approval – Commence advertising and distribution of recruitment brochure	1 Week

Task II. Execution of recruitment strategy and identification of quality candidates

Utilizing the information developed in Task I, Baker Tilly will identify and reach out to individuals who will be outstanding candidates for the position of City Manager. 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 a customized database utilizing our extensive, interactive applicant database for the City Manager position. This will provide the Baker Tilly 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 project team will work with the City Council and designated staff to reach consensus on the leadership and management style for the ideal candidate. Our research will determine the key competencies, work values and leadership/management style for the City Manager and match the candidates to each attribute.

While recruitment is under way, the project team will work with a team of up to 10 subject matter experts (SMEs) who know what successful performance in the City Manager position looks like to reach consensus on the desired leadership and management style for the ideal candidate. We ask the SMEs to complete a 30-minute, on-line questionnaire. When aggregated, these responses generate a benchmark that prioritizes the key competencies, work values and leadership/management style attributes for this position, creating a framework for assessing candidate fit with the City. Later in the process, finalists for the position are asked to complete a companion questionnaire that allows us to match candidates' competencies, work values and leadership/management style to the benchmark. [See sample excerpt of TTI report in [Appendix I.](#)]

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	Timeline
Execution of recruitment strategy and candidate outreach	– Online data collection and profile development – Development of interactive, searchable applicant database for recruitment of the City Manager – Baker Tilly performs direct outreach to prospective candidates identified in the recruitment strategy – Utilization of extensive applicant database to identify applications and review applicant pool for competencies/demographics	4-5 Weeks

Task III. Screening of applicants and recommendation of semi-finalists

In Task III the project team, under the direction of Anne Lewis, will screen the candidates against the criteria within the position and candidate profile and develop a list of semi-finalists for recommendation to the City Council. We will then narrow the list to a group of 10-15 semifinalists for review and select finalists on the basis of written candidate questionnaires, early due diligence information, consultant phone interviews and recorded, one-way video interviews.

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 each candidate's ability to "think on their feet," as well as their personal and professional demeanor. Our team will provide an online link for the City Council, as well as others who

Company history, qualifications, ability and capacity

have input into the hiring decision, allowing them to review and later discuss the recorded responses. This provides your organization with additional candidate assessment tools 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.

Project Milestone	Deliverables	Timeline
Applicant screening and recommendation of semi-finalists	– Baker Tilly compares applications to the approved candidate profile, developed in our searchable applicant database – Most promising applicants are asked to complete candidate questionnaires and provide due diligence information – Media, internet and social media scan for information pertinent to future employment – Top 10-15 candidates identified as semi-finalists – Semi-Finalist Report is prepared, including the brochure, master applicant list, cover letter and resume of candidates to be considered – Baker Tilly and the City review video interviews – Project team leader meets with City Council to review recommended semi-finalists – City Council selects finalists for on-site interviews – Finalists complete candidate management style assessment, responses are reviewed and interview questions are developed	2-3 Weeks

Task IV. Conducting background checks, reference checks and academic verifications

When the City Council approves of a group of finalists for on-site interviews, Baker Tilly 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.

Background checks will include information from the following areas:

Consumer credit	Bankruptcy
City/county – criminal	State district Superior Court – criminal
City/county – civil litigation	State district Superior Court – civil
Judgment/tax lien	Federal district - criminal
Motor vehicle driving record	Federal district – civil litigation
Educational verification	Sex offender registry

To ensure that our quality standards are maintained, we require a minimum of 10 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	Timeline
Design final process with City for on-site interviews with finalists	- Baker Tilly confirms interviews with candidates - Travel logistics are scheduled for candidates	1-2 Days
Background checks, reference checks and academic verification	Baker Tilly completes background checks, reference checks and academic verifications for finalists	10-15 Days

Task V. Final interview process

Upon completion of Task IV, we will work with the City Council to develop the final interview process, including the use of virtual platforms as requested. We customize the final interview process according to the needs and functions of the position and according to your preference, instructions and directives to include steps that are important to you, our client. As such, the final interview process may include meetings with the department heads, a City tour and the opportunity for a meet and greet, if requested by the City Council. In advance of the interviews, 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 the 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 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, 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	Timeline
Final Report prepared and delivered to City	Final Report is prepared; including brochure, interview schedule, cover letter, resume, candidate questionnaire, suggested interview questions, candidate assessment form and management style probing questions	1 Day
On-site interviews with finalists	- Interviews are scheduled - Recruitment project team leader attends client interviews and is available to participate during deliberations of candidates	1-2 Days
Offer made/accepted	- If requested, Baker Tilly participates in candidate employment agreement negotiations - Baker Tilly notifies candidates of decision - Baker Tilly confirms final process close out items with the City of Port Orange	1-2 Days

Our 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 Port Orange'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.

Baker Tilly 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.

Why Baker Tilly is ideally suited to serve Port Orange

There are many reasons Baker Tilly has distinguished itself from peers in public sector executive recruitment.

- **We are experienced and passionate about what we do.** Baker Tilly executive recruitment consultants are highly experienced and passionate about local government since all have spent a significant part of their professional careers in senior leadership positions for cities, counties and school districts. The Baker Tilly team has recruited and placed more than 1,400 executive-level positions within cities, counties, school districts and public and not-for-profit organizations since 2000.
- **We are focused on exceeding your expectations.** We believe in local government and want to assist the City of Port Orange organization in building a great team. We want your organization to hire us again based on the success we achieve the first time we work together.
- **We believe that “ethical business practices” are a catalyst for success.** These practices include operating with transparency, responsiveness and sensitivity to the culture of your organization while pursuing an unrelenting commitment to high quality and professional services.
- **We believe in diversity.** Our corporate core values and work environment reflect our broader social aspirations for a diverse workforce, equal opportunity and cross-cultural respect. We take responsibility for diversity in our organization, our recruitment strategy and our candidate pools. 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 conduct a timely, high-quality recruitment that is within budget.** For an all-inclusive, not-to-exceed professional fee that includes the cost of professional services by the project team leader, the project support staff and all project related expenses such as advertising, preparation of a recruitment brochure, background, reference and academic verification checks and travel expenses for up to three on-site visits. We work with you to establish a timeline, respond to the City's needs and to unexpected circumstances that may develop during the course of a recruitment in order to expedite the recruitment, but not at the expense of finding high quality candidates for the City of Port Orange.
- **We utilize the latest technologies that uniquely sets us apart.** Technology plays an important role in the Baker Tilly executive recruitment process. From our proprietary video interview system and our management/leadership style assessment analysis, to our proprietary online application system, we efficiently manage candidate information

and provide the City with unique information about each candidate's leadership and management style and ability to respond extemporaneously to video questions.

- **We offer a “Triple Guarantee” that commits Baker Tilly to the City’s success.**
 - We remain focused to assist with your executive recruitment until you make an appointment
 - We guarantee your executive recruitment for 12 months against termination or resignation for any reason – or we come back to fill the City Manager position for no additional professional fee
 - We will not directly solicit any candidates selected under this contract for another position while the candidate is employed with your organization

Benefits to Port Orange

Selecting Baker Tilly to conduct your executive recruitment provides you with the following benefits:

- **Comprehensive and structured process:** Our process is comprehensive and seamless, reflecting our years of interaction with local government employers and prospective candidates.
- **Transparency:** Baker Tilly comes to the City without having any preconceived notions or expectations about the Port Orange and prospective candidates. The Baker Tilly team works closely with the City to make sure the process is transparent.
- **Confidentiality:** Prospective candidates know that their application will be kept confidential, allowing them to express interest in the City Manager position without jeopardizing their current employment. Our reputation for ensuring candidate confidentiality as permitted by state and local law means that the City of Port Orange can count on maximizing the number of qualified candidates interested in the position.
- **Candidate recruitment:** Baker Tilly actively recruits qualified candidates, drawing from our extensive personal and professional connections with capable individuals around the state, region and nation and assuring the City of its access to established managers and rising stars. The ability to widely recruit for prospective candidates is one of the primary benefits of using Baker Tilly.
- **Focused use of the City’s time:** Baker Tilly’s comprehensive process incorporates the active participation of City Council members at key steps in the process. Our process keeps decision makers fully advised and informed of all aspects of the process without requiring them to expend large amounts of time on the recruitment process or to put aside other pressing issues facing the City.
- **Minimize staff disruption:** Baker Tilly’s search process also minimizes disruptions to City staff, some of whom may have additional duties in this time of transition. Because conducting a thorough recruitment can be time-consuming, Baker Tilly’s involvement allows staff to stay focused on their primary and assigned functions.
- **Thorough evaluation of candidates:** The City of Port Orange seeks a City Manager of sound professional and personal character. Baker Tilly’s process includes a thorough evaluation of the final candidates, including detailed information from references and a careful review of background records.

Assistance required from the City

Baker Tilly requests a commitment by City of Port Orange officials to meet with the recruitment project team leader during the initial and subsequent visits, and to provide the information requested during and prior to the Consultant's visits for the purposes of marketing the position to prospective qualified candidates.

Baker Tilly requests that the City designate a staff member to serve as our primary point of contact throughout the recruitment. We will ask this person to provide requested information, arrange meetings and serve as the point of contact for progress reporting, provide information needed for each recruitment, such as salary and benefits information, and respond to questions as needed. Also, as part of the interview process, we recommend that department heads be available to meet with finalists and that key personnel be available to assist in providing a tour of the community.

The City would be responsible for organizing the on-site interview process, but always with best practice suggestions provided by the recruitment project team leader, if requested. As identified in the Cost Information tab, the City would be responsible for all travel related expenses incurred by candidates for on-site interviews and should be handled directly by the City and would not be the responsibility of Baker Tilly. This recruitment process is considered a turn-key process to identify qualified and outstanding City Manager candidates for the City of Port Orange. Any other responsibilities relating to both Baker Tilly and the City, such as submittal of invoices, payment terms and all other anticipated interactions are detailed in various sections of this proposal.

Sample materials

Sample materials are provided in [Appendix I](#).

Placement 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 finalize selection from the initial group of finalists, Baker Tilly will work to identify a supplemental group until you find a candidate to hire.
2. Your executive recruitment is guaranteed for 12 months against termination or resignation for any reason. The replacement recruitment will be repeated with no additional professional fee, but will include 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. Baker Tilly will not directly solicit any candidates selected under this contract for any other position while the candidate is employed with your organization.

Resumes and qualifications

Firm qualifications

Baker Tilly is a nationally recognized firm with a long history of service to clients located throughout the country. For more than 85 years, Baker Tilly has understood that our business demands absolute integrity, a belief in the value of trusted relationships and a willingness to collaborate with every client. We will strive to continue to deepen and enhance our relationship with the City as we seek to become your Valued Business Advisor.

Executive recruitment for public and non-profit clients has been a part of Baker Tilly's portfolio of advisory services for more than 30 years. Within Baker Tilly, our executive recruitment team consists 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 villages, cities, counties, special districts and school districts and the many different disciplines that comprise the City of Port Orange 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 your expectations. Since 2015, our combined consultant team has conducted nearly 500 executive searches.

The Baker Tilly project team will collaborate with the City Council and the City's 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 consistent with "best practices" in the public sector executive recruitment space. Our objective is to generate highly qualified candidates and assist you with the screening and evaluation of these candidates.

Since our firm's beginning, we have emerged as a leader in human resource management consulting and executive recruitment. It is our 30+ years of consulting experience, coupled with our unique approach and personal touch that drives our internal standard for delivering only outstanding services and leading-edge products.

Project team qualifications

The Baker Tilly project team is designed specifically for the City of Port Orange.

The project team represents experienced professionals who will be working on this City Manager recruitment. Our service team is selected to meet four very specific objectives for the City: 1) it represents the staff who will be directly responsible for your projects; 2) it provides a range of expertise to cover the range of service requirements; 3) it provides a national perspective of experience and institutional knowledge to achieve your future objectives; and 4) it represents the commitment to take personal and professional responsibility for the services and outcomes for the City of Port Orange.

Project team leader

Anne Lewis, Director

T: +1 (540) 476 1905

E: anne.lewis@bakertilly.com

Additional project team members

Chuck Rohre, Firm Director

T: +1 (214) 466 2436

E: chuck.rohre@bakertilly.com

Art Davis, Director

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Patricia Heminover, Director

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Our engagement team
has completed more
than 150 successful
administration searches
since 2015.

Company history, qualifications, ability and capacity

Sharon Klumpp, Director

T: +1 (651) 223 3053

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Edward G. Williams, Ph.D., Director

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Michelle Lopez, Senior Recruitment Analyst

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Anne Lewis

Anne Lewis, a director with Baker Tilly, has worked for local governments for nearly 20 years.



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Education

Master of Science, Organizational Leadership
and Public Administration
Shenandoah University (Winchester, Virginia)

Bachelor of Science, Business Administration
and Management
Shenandoah University (Winchester, Virginia)

Prior to joining Baker Tilly, Anne served as an Assistant County Administrator for a Virginia county, a Deputy City Manager and an Assistant City Manager for two Virginia cities. Over the last 17 years, her experience in local government has also included positions as an Emergency Management Deputy Director, Public Information Officer, Human Resources Manager, Parking Authority Executive Director, Housing Director, Transit Director and Convention & Visitors Bureau Executive Director. She also has had responsibility for parks, recreation and community services, information technology, animal services, general services and legislative programs.

Industry involvement

- International City/County Management Association, Credentialed Manager (ICMA)
 - Task Force on Recruitment Guidelines Handbook
 - Task Force on Women in the Profession
 - Task Force on Internship Guidelines
- Virginia Local Government Management Association (VLGMA), former member of Executive Board
- Virginia Women Leading Government
- Government Finance Officers Association (GFOA)

Community involvement

- Shenandoah University Alumni Association, Executive Committee
- Shenandoah Apple Blossom Festival®, Board of Directors

Continuing professional education

- Graduate Certificate in Public Management
- Senior Executive Institute and LEAD graduate, The Weldon Cooper Center, University of Virginia

Charles A. Rohre

Chuck Rohre, a firm director at Baker Tilly, has more than 35 years of experience managing and consulting in both the private and public sectors.



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Firm Director

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Education

Master's Degree, Human Relations and Management
Abilene Christian University (Dallas, Texas)

Bachelor of Science, Career Development
Abilene Christian University (Dallas, Texas)

Chuck is responsible for managing and conducting executive recruitment engagements for the firm to ensure 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 goals are met.

Specific experience

- Manager of the executive recruitment practice
- Extensive and successful track record of completed recruitments across the nation, especially in Texas, Colorado, Arizona, and the Midwestern states
- Has led more than 400 recruitment engagements in 27 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
- Conducted management consulting assignments in a number of disciplines including public safety, career development and strategic planning
- Written and presented training in a variety of subject areas including personnel assessment, leadership and management skills, and career development for public sector employees
- Prior to beginning his consulting career, served as police chief and director of public safety for North Texas municipalities with populations ranging from 9,000 to 200,000 plus

Continuing professional education

- Certified Behavior Analyst by TTI, Inc.
- Advanced management training at the Institute for Law Enforcement Administration
- Federal Bureau of Investigation, LEEDS course
- Annual participation in the International City/County Management Association Conference
- Annual participation in state and municipal league conference

Art Davis

Art Davis, a director with Baker Tilly, has pursued his passion to improve local government and create great communities for more than 30 years.



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Education

Master of Public Administration
University of Kansas (Lawrence, Kansas)

Bachelor of Arts, Political Science
and Public Administration
William Jewell College (Liberty, Missouri)

Art specializes in providing executive recruitment and organizational management consulting services for cities, counties and not-for-profits.

Specific experience

- Successfully launched and expanded his own local government consulting firm over the course of 10 years
- Nearly 15 years' experience in executive recruitment
- Community leadership program facilitation
- Leadership and management development
- Strategic goal setting and strategic planning facilitation
- Organizational assessment, design and development
- Organization and community facilitation
- Served more than six years 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
- Coordinated and organized a strategic and master planning process (and an update of the plan after four years) focused on re-developing downtown Kansas City, involving hundreds of stakeholders
- Served nearly six years as city administrator for Lee's Summit, Missouri and in other local government positions in Kansas
- Served as assistant to the Mayor of Dallas, Texas
- Led and participated in a wide variety of community initiatives; served on a major hospital board for 13 years and on other not-for-profit boards
- 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

Industry involvement

- International City/County Management (ICMA), member since 1984

Patricia Heminover

Patty Heminover, a director with Baker Tilly, has more than 20 years of experience in local government.



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Education

Master of Education, Administration
Minnesota State University – Mankato

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

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

Patty has been with the firm since 2010. Prior to joining Baker Tilly, she was a superintendent, assistant superintendent, director of human resources and director of finance. She brings considerable experience identifying management talent, leading organizational and process improvements, and developing and administering budgets.

Specific experience

- Executive Recruitment, employee development, benefits administration, strategic planning, performance management, market compensation studies, workforce planning, recognition programs and process improvement
- Experience identifying management talent, leading organization and process improvements, and developing and administering budgets
- Understanding of human resources and finance
- Experience working with governing boards
- Served as superintendent, co-superintendent of schools, director of human resources and finance, director of human resources and business services for two Minnesota school districts
- Facilitated discussions with legislators at the state level regarding education funding, securing new funding for a Minnesota school district

Industry involvement

- Minnesota Association of School Administrators (MASA)
- American Association of School Administrators (AASA)
- Minnesota Association of School Business Officials (MASBO)
- River Heights Chamber of Commerce, Member
- State Negotiators Association,
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

Continuing professional education

- Human Resource Certificate, University of St. Thomas
- Superintendents Licensure, State of Minnesota

Sharon G. Klumpp

Sharon Klumpp, a director with Baker Tilly, has worked on behalf of local governments for more than 35 years and partnered with them to build strong organizations.



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Education

Master of Public Administration
University of Kansas (Lawrence, Kansas)

Bachelor of Arts, Political Science
Miami University (Oxford, Ohio)

Sharon specializes in providing executive recruitment, organizational management and facilitation services to local governments and nonprofits.

Specific experience

- More than 15 years' experience in executive search and organizational management consulting
- Served as associate executive director for the League of Minnesota Cities
- Appointed executive director of the Metropolitan Council, a seven-county regional planning agency for the Minneapolis-Saint Paul metropolitan area
- Served as city administrator in Oakdale, Minnesota and assistant city manager for St. Louis Park Minnesota and Saginaw, Michigan
- Private sector experience includes serving as the chief administrative officer for the Minneapolis office of a major global engineering and design firm
- Served as an adjunct instructor at Walden University, teaching public administration and organizational change in the University's School of Management

Industry involvement

- International City/County Management Association (ICMA)

Edward G. Williams, Ph.D.

Edward Williams, a director at Baker Tilly, brings character, competence and expertise to every search.



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Languages

English

Spanish

Education

Ph.D., Educational Leadership and Policy Analysis
University of Missouri (Columbia, Missouri)

Master of Higher Education Administration
University of Missouri (Kansas City, Missouri)

Bachelor of Arts, Education
University of Missouri (Kansas City, Missouri)

Edward has more than 20 years of collective experience in human resources and organizational development at various levels, and across various disciplines including, state and local government, community and educational institutions.

Specific experience

- Human resources executive (municipal and state government)
- Executive recruitment, employee development, benefits administration, strategic planning, Performance management, market compensation studies, workforce planning, recognition programs and process improvement

Industry involvement

- Society for Human Resources (SHRM)
- Institute for Management Studies (IMS), advisory board
- Texas Municipal Human Resources Administration (TMHRA)

Community involvement

- Ft. Bend Habitat for Humanity, president, vice-president, secretary and member, board of (2014-2019)
- AAU basketball coach – middle school boys

Continuing professional education

- Institute for Management Studies - Houston
- International Personnel Management Association

Michelle Lopez

Michelle Lopez, a senior recruitment analyst at Baker Tilly, has been with the firm since 2017.



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Senior Recruitment Analyst
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bakertilly.com

Education

Currently pursuing Bachelor of Science, Project
Management
Colorado State University – Global Campus

Associate in Arts, Liberal Arts
Minneapolis Community College (Minneapolis, Minnesota)

Michelle assists in the organizational management of the executive recruitment process. Along with coordinating internal workflow, she also works with clients and candidates to ensure objectives are met throughout the process.

Specific experience

- More than 10 years of administrative support experience for multiple departments, including human resources and marketing
- Four years of experience in information technology help desk and support
- Survey and data reporting
- Reference checks for potential candidates
- Interview coordination and scheduling
- Recruitment marketing research and organization



Business Licenses/Sunbiz

State of Florida



Department of State

I certify from the records of this office that BAKER TILLY VIRCHOW KRAUSE, LLP is a partnership.

I further certify that said partnership filed a Statement of Qualification on May 17, 2007. The document number assigned to this statement is LLP070003454.

I further certify that the status of said partnership is active.



Given under my hand and the
Great Seal of the State of Florida
at Tallahassee, the Capital, this the
Eleventh day of March, 2020



CR2E022 (01-11)

Laurel M. Lee

Laurel M. Lee

Secretary of State

Financial stability/litigation and debarment history

Financial strength and stability

Here are key points to consider regarding the financial strength and stability of Baker Tilly:

- Baker Tilly ranks as the 11th largest accounting and advisory firm in the U.S. on the 2020 INSIDE Public Accounting Top 100 Firms list.
- We serve both privately held and publicly traded clients ranging in size from \$1 million to billions of dollars in revenues.

The table below shows our firm's net revenues for the past three fiscal years.

	2020	2019	2018
Net revenue	\$789.6M	\$754.8M	\$578M

As a privately held firm and partnership, we do not publish or distribute our financial information to the public or to anyone without a signed non-disclosure agreement. Information about the firm's net revenues can be found on our website through our annual report. In the event that Baker Tilly is chosen as a finalist in the RFP process and additional financial information is required, we may release some selected high-level financial information to Port Orange, providing the information is not posted or shared on any public website or forum and is not shared with other vendors, candidates or clients.

Baker Tilly's past and current litigation

In the normal course of business as a large accounting and advisory firm, Baker Tilly may be made a party to litigation alleging various common law and statutory violations. While Baker Tilly expects to resolve all pending matters without any material detrimental impact to the firm, like most accounting firms of any size, the firm does not disclose or discuss its litigation. Litigation is generally disposed of in the normal course of business and under any applicable professional indemnity insurance policy. We enjoy the benefits of a positive reputation.

Professional liability insurance coverage

Baker Tilly maintains professional liability insurance coverage in an amount consistent with similarly sized firms. We have a positive claims history and have positive relationships with our insurance carriers.

References

Anne Lewis is the designated project lead for the City Manager recruitment. Feel free to contact any of the individuals listed below to verify the quality of work Baker Tilly provides to each client as part of these recently completed executive recruitment projects.

FORM 9.8 – PROFESSIONAL REFERENCES FOR PREVIOUS EXPERIENCE

The Proposer proposes that he/she is qualified to perform the referenced work and has successfully done so on recent projects similar in nature and size. The City reserves the right to check references and confirm information provided herein.

Please provide three (3) current and correct references from clients for similar services. (Do not include the City of Port Orange)

1. Company Name: City of Frederick, Maryland
Contact Person: Ms. Sandra Nichols, City Attorney
City, State: Frederick, Maryland 21701
Telephone Number: 301-600-1387
Email Address: snickols@cityoffrederick.com
Description of goods or
Services provided: Selection of Human Resources Director
Contract Amount: \$24,500
Start/End Date of Contract: September – December 2016
2. Company Name: Chesterfield County, Virginia
Contact Person: Ms. Mary Martin Selby, SPHR, SHRM-SCP, Director of Human Resources
City, State: Chesterfield, Virginia 23832
Telephone Number: 804-748-1056
Email Address: hrm@chesterfield.gov
Description of goods or
Services provided: Selection of Police Chief
Contract Amount: \$24,500
Start/End Date of Contract: July - November 2017
3. Company Name: County of Albemarle, Virginia
Contact Person: Ms. Lorna Gerome, Director of Human Resources
City, State: Charlottesville, Virginia 22902
Telephone Number: 434-296-5827 x3016
Email Address: lgerome@albemarle.org
Description of goods or
Services provided: Selection of County Executive (2017), Economic Development Director (2017), Finance Director – partial recruitment (2017), E-9-1-1 Executive Director (2017)
Contract Amount: \$24,000
Start/End Date of Contract: County Executive March – July 2017

This document must be completed and returned with your Submittal.

LISTING OF PREVIOUS EXPERIENCE

Commercial Client List

The Proposer proposes that he/she is qualified to perform the referenced work and has successfully done so on recent projects similar in nature and size. A minimum of three (3) projects must be listed below. The Owner reserves the right to check references and confirm information provided herein.

List all clients to whom you currently provide or have in the past provided **Architectural Services** equal or similar to those required under the City's contract and as outlined in this Proposal package. A minimum of three (3) projects shall be listed below in order to Proposal on this contract. The Owner reserves the right to check references and confirm information provided herein.

	Contact Name	Phone	Current Client? Y or N	Number of years service provided	Description of service
1	N/A				
2					
3					

This document must be completed and returned with your Submittal.

Cost information

The all-inclusive professional fee to conduct the recruitment is provided below.

Professional fee

The all-inclusive professional fee includes the cost of professional services by the 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 Baker Tilly 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.

All questions regarding the professional fees and project-related expenses should be directed to Anne Lewis at anne.lewis@bakertilly.com or via phone at (540) 476 1905.

Phase	Description of professional services	Fee
Phase I	Task 1 Candidate profile development/advertising/marketing lead consultant hourly rate – approximately 14 hours research/project management staff hourly rate – approximately 16 hours	\$3,150 \$1,700
	Task 2 Identify quality candidates lead consultant hourly rate – approximately 14 hours research/project management staff hourly rate – approximately 16 hours	\$3,150 \$1,700
Phase II	Task 3 Preliminary screening & initial report to client lead consultant hourly rate – approximately 18 hours research/project management staff hourly rate – approximately 20 hours	\$4,150 \$2,000
	Task 4 Reference checks, background checks, assessments and academic verifications lead consultant hourly rate – approximately 11 hours research/project management staff hourly rate – approximately 12 hours	\$2,500 \$1,300
Phase III	Task 5 Final process/on-site interviews with finalists lead consultant hourly rate – approximately 14 hours research/project management staff hourly rate – approximately 16 hours	\$3,150 \$1,700
Conclusion	Acceptance of offer by candidate	
TOTAL ALL-INCLUSIVE PROFESSIONAL FEE		\$24,500

Optional services

Optional services for consideration	Fee
At the City's option, Baker Tilly 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.	\$1,650
On rare occasions, Baker Tilly 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. Baker Tilly 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.	\$220 per hour plus expenses



Required forms

SECTION 9 – REQUIRED FORMS

FORM 9.1 – PROPOSAL SUBMITTAL CHECKLIST

- ☒ Form 9.2 – Proposer’s Acknowledgement
- ☒ Form 9.3 – Addendum and Change Order Procedure Acknowledgement
- ☒ Form 9.4 – Drug Free Preference Statement
- ☒ Form 9.5 – Public Entity Crimes Statement
- ☒ Form 9.6 – Affidavit of Anti-Collusion
- ☒ Form 9.7 – Statement of Qualifications
- ☒ Form 9.8 – Professional References for Previous Experience
- ☒ Form 9.9 – Local Business Affidavit of Eligibility
- ☒ Copy of License (Contractor, Sunbiz, etc.)
- ☒ Submission of one (1) original marked “ORIGINAL” and one (1) digital (CD or flash drive)

version in PDF format.

Baker Tilly, US, LLP

Name of Business

BY: _____
Authorized Signature

December 8, 2020

Date

This document must be completed and returned with your Submittal

FORM 9.2 – PROPOSER’S ACKNOWLEDGEMENT FORM

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/ or Special Conditions, Specifications, and any other documents accompanying or made a part of this invitation.

I hereby propose to furnish the goods or services specified in the Request for Statement of Qualifications at the prices or rates as finally negotiated. I agree that my Proposal will remain firm for a period of up to ninety (90) days in order to allow the City of Port Orange adequate time to evaluate the proposed Proposal. Furthermore, I agree to Proposal by all conditions of the Request for Proposals.

I certify that all information contained in this Proposal is truthful to the best of my knowledge and belief. I further certify that I am a duly authorized to submit this Proposal on behalf of the Proposer/Contractor as its act and deed and that the Proposer/Contractor is ready, willing and able to perform if awarded the contract.

I further certify that this Proposal is made without prior understanding, Contract, connection, discussion, or collusion with any person, firm or corporation submitting a Proposal for the same product or service; no officer, employee or agent of the City of Port Orange City Council or of any other Proposer interested in said RFP; and that the undersigned executed this Proposer’s Acknowledgement with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

I further certify that having read and examined the specifications and documents for the designated services and understanding the general conditions for contract under which services will be performed, does hereby propose to furnish all labor, equipment, and material to provide the services set forth in the RFP.

I hereby declare that the following listing states any clarifications, any and all variations from and exceptions to the requirements of the specifications and documents. The undersigned further declares that the “work” will be performed in strict accordance with such requirements and understands that any exceptions to the requirements of the specifications and documents may render the Proposal non-responsive.

NO EXCEPTIONS ALLOWED AFTER THE PROPOSAL IS SUBMITTED:

Please check one: ☐ I take NO exceptions. ☒ Exceptions (list below; add additional pages if necessary):

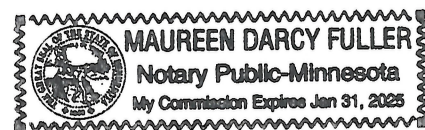
<u>Baker Tilly US, LLP</u>	<u>8219 Leesburg Pike, Suite 800,</u>
NAME OF BUSINESS	MAILING ADDRESS
<u></u>	<u>Tysons, VA 22182</u>
AUTHORIZED SIGNATURE	CITY, STATE & ZIP CODE
<u>Bonnie. Matson, Principal</u>	<u>(651) 223 3014</u>
NAME, TITLE, TYPED	TELEPHONE NUMBER / FAXNUMBER
<u>39-0859910</u>	<u>bonnie.matson@bakertilly.com</u>
FEDERAL IDENTIFICATION #	E-MAIL ADDRESS
STATE OF <u>MINNESOTA</u> COUNTY OF <u>RAMSEY</u>	

The foregoing instrument was acknowledged before me this day of December 8, 2020 by Bonnie Matson, who is personally known to me or who has produced ad identification and who did take an oath.

My Commission Expires: 1/31/25 Notary Public



This document must be completed and returned with your Submittal



Exceptions

We hereby take exception to the following provisions of the City's RFP: "Ownership of Documents" in Section 2; Section 4(16); Section 5 provisions 7, 31, 35, 39, 40, 41, 42, 48, 62, and 65; and Standard Contract sections 9, 11, 18, and 20. Notwithstanding anything to the contrary in the RFP, if selected, we will require the ability to propose additional terms and negotiate mutually acceptable revisions to these sections prior to executing a final contract.

FORM 9.3 – ADDENDUM and CHANGE ORDER PROCEDURE ACKNOWLEDGEMENT

ADDENDUM ACKNOWLEDGEMENT

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/ or Special Conditions, Specifications, and any other documents accompanying or made a part of this Request for Statement of Qualifications.

I acknowledge receipt and incorporation of the following addenda, and the cost, if any, of such revisions has been included in the price of the Proposal form.

Addendum # 1 Date: 12/7/2020 Addendum # _____ Date: _____
Addendum # _____ Date: _____ Addendum # _____ Date: _____

CHANGE ORDER PROCEDURE ACKNOWLEDGEMENT

If awarded the Contract for this Solicitation, I acknowledge that no oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All change orders requests shall be made in writing by the Contractor for review by the Contract Administrator for the City of Port Orange. No work shall be performed as set forth in the change order until the Contractor receives an executed Purchase Order for the requested change.

I acknowledge the following statement regarding Change Orders to the awarded Contract:

Baker Tilly US, LLP
Name of Business
By: [Signature]
Printed Name: Bonnie Matson
Title: Principal

STATE OF MINNESOTA
COUNTY OF RAMSEY

Sworn to (or affirmed) and subscribed before me this 8th day of December, 2020, by
Bonnie Matson, as Principal of
(NAME) (TITLE)
Baker Tilly US, LLP and who:
(NAME OF ORGANIZATION)

[Notary: Please select one]

is personally known to me; or
has produced _____ as identification.



[Signature]
Notary Public, State of Minnesota
Printed, typed or stamped name, commission and expiration:
Commission # 31065068

This document must be completed and returned with your Submittal

FORM 9.4 – DRUG-FREE PREFERENCE STATEMENT

In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under Proposal a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under Proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

As an authorized representative of the firm, I certify that this firm complies fully with the above requirements.

STATE OF MINNESOTA
COUNTY OF RAMSEY

Baker Tilly US, LLP

Name of Business

By: [Signature]

Printed Name: Bonnie Matson

Title: Principal

Sworn to (or affirmed) and subscribed before me this 8th day of December, 2020, by
Bonnie Matson, as Principal of

(NAME)

(TITLE)

Baker Tilly US, LLP and who:

(NAME OF ORGANIZATION)

[Notary: Please select one]

is personally known to me; or

has produced _____ as identification.

[Signature]

Notary Public, State of Minnesota

Printed, typed or stamped name, commission and expiration:

Commission # 31065068



This document must be completed and returned with your Submittal

FORM 9.5 – SWORN STATEMENT UNDER SECTION 287.133(3)(A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

(To be signed in the presence of notary public or other officer authorized to administer oaths.)

Before me, the undersigned Authority, personally appeared affiant before me, who, being by me first duly sworn, made the following statement:

1. The business address of Baker Tilly US, LLP (name of Offeror or business) is 380 Jackson Street, Suite 300, St Paul, MN 55101.
2. My relationship to Bonnie C Matson (name of Offeror or business) is Principal (relationship such as sole proprietor, partner, president, vice-president).
3. I understand that a public entity crime as defined in Section 287.133 of the Florida Statutes includes a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or such an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy or material misrepresentation.
4. I understand that "convicted" or "conviction" is defined by the Florida Statutes to mean a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilt or nolo contendere.
5. I understand that "affiliate" is defined by the Florida Statutes to mean (1) a predecessor or successor of a person or a corporation convicted of a public entity crime, or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime, or (3) those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate, or (4) a person or corporation who knowingly entered into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months.
6. Neither the Offeror or contractor, nor any officer, director, executive, partner, shareholder, employee, member or agent who is active in the management of the Offeror or contractor, nor any affiliate of the Offeror or contractor has been convicted of a public entity crime subsequent to July 1, 1989. (Draw a line through paragraph 6 if paragraph 7 below applies.)
7. ~~There has been a conviction of a public entity crime by the Offeror or contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the Offeror or contractor who is active in the management of the Offeror or contractor or an affiliate of the Offeror or contractor. A determination has been made pursuant to Section 287.133(3) by order of the Division of Administrative Hearings that it is not in the public interest for the name of the convicted person or affiliate to appear on the convicted Proposer list. The name of the convicted person or affiliate is _____.~~
~~A copy of the order of the Division of Administrative Hearings is attached to this statement. (Draw a line through paragraph 7 if paragraph 6 above applies.)~~

Baker Tilly US, LLP
Name of Business
By: [Signature]
Printed Name: Bonnie Matson
Title: Principal

STATE OF MINNESOTA
COUNTY OF RAMSEY

Sworn to (or affirmed) and subscribed before me this 8th day of December, 2020 by Bonnie Matson, as Principal of Baker Tilly US, LLP and who:

[Notary: Please select one]

is personally known to me; or
has produced _____ as identification.



[Signature]
Notary Public, State of Minnesota
Printed, typed or stamped name, commission and expiration:

This document must be completed and returned with your Submittal

51

Commission # 31065068

FORM 9.6 – ANTI-COLLUSION FORM

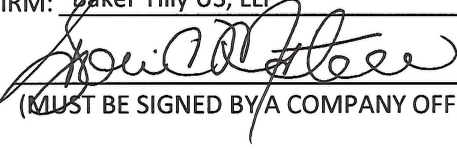
ANTI-COLLUSION STATEMENT PROPOSAL FORM:

By signing this form, the Proposer agrees that this Proposal is made without any other understanding, agreement, or connection with any person, corporation, or firm submitting a Proposal for the same purpose and that the Proposal is in all respects fair and without collusion or fraud.

SIGN in ink in the space provided below. Unsigned Proposals will be considered incomplete, and will be disqualified, and rejected.

IT IS AGREED BY THE UNDERSIGNED PROPOSER THAT THE SIGNING AND DELIVERY OF THE PROPOSAL REPRESENTS THE PROPOSER'S ACCEPTANCE OF THE TERMS AND CONDITIONS OF THE FOREGOING SPECIFICATIONS, CONTRACT AND PROVISIONS, AND IF AWARDED, THIS CONTRACT WILL REPRESENT THE AGREEMENT BETWEEN THE PROPOSERS AND THE CITY OF PORT ORANGE.

NAME OF FIRM: Baker Tilly US, LLP

SIGNED BY: 
(MUST BE SIGNED BY A COMPANY OFFICER OR AUTHORIZED AGENT)

PRINTED SIGNATURE: Bonnie Matson

TITLE: Principal

ADDRESS: 8219 Leesburg Pike, Suite 800

CITY: Tysons STATE: Virginia ZIP CODE: 22182

TELEPHONE: (651) 223 3014 FAX: (651) 223 3046

COMPLETION TIME: _____

F.E.I.N. NUMBER: 39-0859910

NO Proposal may be withdrawn for a period of ninety (90) days subsequent to the submittal of the Proposals, without the consent of the City of Port Orange.

NO PROPOSAL (REASON): _____

This document must be completed and returned with your Submittal

FORM 9.7 – STATEMENT OF QUALIFICATIONS

The undersigned warrants that he or she is duly authorized to complete this document, and hereby affirms that the information contained in Form 9.7 is complete, true, and correct to the best of their knowledge and belief. If necessary, questions may be answered on separate paper and attached, with any additional information that may be pertinent.

- A. Name of Proposer. Baker Tilly US, LLP
- B. Permanent main office address. 205 North Michigan Avenue, Chicago, IL 60601-5927
- C. Date organized. 1941
- D. If a corporation, where incorporated.
- E. How many years have you been engaged in the contracting business under your present firm or trade name? 89
- F. Contracts on hand: (Schedule these, showing amount of each contract and the appropriate anticipated dates of completion.)
- G. General character of work performed by your company. Accounting and advisory services
- H. Have you ever failed to complete any work awarded to you? If so, where and why? No
- I. Have you ever defaulted on a contract? If so, where and why? No
- J. List the more important projects recently completed by your company, stating the approximate cost for each and the month and year completed.
- K. List your major equipment currently owned or leased. 50+ office locations
- L. Experience in work similar to this type of project. More than 30 years
- M. Background and experience of the principal members of your organization, including the officers.
- N. Credit currently available: \$ _____
- O. Give bank reference: US Bank, Milwaukee, WI 53202, Matthew J Schulz, 414 765 5724
- P. Will you, upon request, fill out a detailed financial statement and furnish any other information that may be required by the Owner?
- Q. The undersigned hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the Owner in verification of the recitals comprising this Statement of Qualifications.

Baker Tilly US, LLP

Name of Business

By: Bonnie Matson

Printed Name: Bonnie Matson

Title: Principal

STATE OF MINNESOTA

COUNTY OF RAMSEY

Sworn to (or affirmed) and subscribed before me this 8th day of December, 2020, by
Bonnie Matson, as Principal
of Baker Tilly US, LLP and who:

[Notary: Please select one]
is personally known to me or
has produced as identification.



Maureen D Fuller
Notary Public, State of Minnesota

Printed, typed or stamped name, commission
and expiration

Commission # 31065068
This document must be completed and returned with your Submittal

Form 9.8 Professional References for Previous Experience

Provided in the References tab

ATTACHMENT 1 – PROPOSAL FORM

"ATTACHMENT 1" SCHEDULE OF UNIT PRICING

PROPOSAL FORM

CITY OF PORT ORANGE

RFP# 21-05

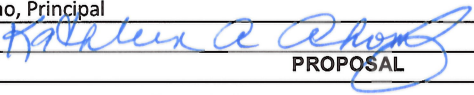
Executive Search Services

Completed Attachment 1 Bid Proposal form MUST be included with Bid Submission

Instruction to save Attachment from DemandStar website:

Perform "File Save As" and save spreadsheet to your computer. Fill in pricing in highlighted cells, preferably electronically.

Bidders are required to complete all fields shaded in green. All other fields will be automatically calculated.

NAME OF BUSINESS:	Baker Tily US, LLP
CONTACT PERSON:	Anne Lewis, Director
EMAIL ADDRESS:	anne.lewis@bakertilly.com
AUTHORIZED NAME:	Kathy Aho, Principal
AUTHORIZED SIGNATURE:	

PROPOSAL

Item	Description	Unit Price
	GENERAL	
1	COST PER SCOPE OF SERVICES	\$24,500.00

This document must be completed and returned with your Submittal

Appendix I: sample materials

CITY MANAGER

EAU CLAIRE, WISCONSIN



The Community

The City of Eau Claire, Wisconsin (estimated 2018 pop. 68,802) is a vibrant regional center for education, business, services, and culture, serving western Wisconsin. Covering 34 square miles, Eau Claire is conveniently linked by air and the interstate system to major markets in the upper Midwest. Located along the I-94 corridor in western Wisconsin, Eau Claire is less than two hours away from Minneapolis/ St. Paul and just under three hours from Madison. Scheduled daily air service links Eau Claire with the Chicago O'Hare International Airport.

Eau Claire boasts strong retail outlets, state-of-the-art regional medical facilities, educational institutions, and high-tech manufacturing operations. Top employers in the area include the Mayo Clinic Health System, Nestle USA, Menards' corporate headquarters, and the University of Wisconsin-Eau Claire, consistently ranked one of the top public regional universities in the Midwest. Eau Claire's growing downtown area is a significant economic engine with approximately 600 businesses employing approximately 12,000 individuals. The City's low costs of living and housing coupled with its strong economic outlook position Eau Claire for continued growth.

Its picturesque setting on the banks of the Eau Claire and Chippewa Rivers is on full display among the City's many beautiful parks and trails, creating a 28-mile network for walking and cycling. Well-preserved historic neighborhoods add to the City's charm. Residents enjoy a wide variety of year-round sporting events, thanks to four distinct seasons. Swimming, biking, boating, golfing, hunting, fishing, skating, and cross-country skiing are just a few of the activities that attract visitors to the area.

Showcasing the new \$60 million Pablo Center at the Confluence, Eau Claire is also a cultural center with a rich and diverse array of arts, music, and entertainment events. The Blue Ox Music Festival, Country Jam, Eau Claire Festival, Jazz Fest, Music in the Park, and Tuesday Night Blues represent a sample of Eau Claire's lively music scene.



Top 3 Most Livable Small Cities in the U.S.
SmartAsset



Top 5 Best College Towns in the U.S.
schools.com



Top 5 Most Affordable Homes in the U.S.
lendedu



Top 100 Places To Live
Livability



All-America City and **Tree City USA**
National Civic League and The Arbor Day Foundation



We are a community on the rise. Our community created this video and website that captures Eau Claire's authentic can-do spirit.

<https://www.thinkeauclaire.com>





The Organization

Since 1949 the City of Eau Claire has operated under a Council-Manager form of government and is governed by an eleven-member City Council responsible for all legislative actions, determining community needs, establishing priorities and policies, adopting an annual budget, and hiring the City Manager. Five members are elected by district and five members and the Council President are elected at-large. All City Council members serve staggered three-year terms.

The City provides a full range of municipal services, including housing and economic development; parks and recreation; police and fire protection; street construction and infrastructure maintenance; public transit; water; sewer and storm water, and public library services. The City's Operating Budget and Capital Improvement Plan are updated and approved by Council annually. Council workshops and public hearings provide citizens with opportunities for public feedback on the Operating Budget and Capital Improvement Plan. Participatory budgeting gives citizens an opportunity to determine funding for some projects.

The 2020 City operating budget is \$133.7 million, including a General Fund of \$76.7 million, supported by a property tax levy of \$43.9 million. The 2020 budget authorizes 497.25 full-time equivalents (FTEs), excluding Library, City-County Health and CDBG-federally funded employees. Approximately 45 percent of the City's workforce is represented by bargaining units for police, fire, and transit employees.

Vision

Eau Claire is a vibrant city with exceptional quality of life and services.

Mission

It is our mission to assure the common good through services essential for a safe, sustainable, engaged and healthy community.

Our Strategic Values

We believe in making Eau Claire a great city.
We believe that local government is a stewardship.
We believe in sustainability.
We believe in equity.



The Position

The City Manager position is available because of the announced retirement of Dale Peters who has been with the City in various capacities for over 30 years. As the City's chief executive officer, the City Manager directs and carries out the goals, objectives, and directives established by the City Council and provides organizational leadership in equity, diversity, and inclusion. Eight department heads, the Information Services Manager, the City Clerk, and Executive Assistant report to the City Manager. The City Manager is appointed by and reports to the City Council.

Major responsibilities include:

- Works closely with the City Council to define and accomplish strategic goals and objectives.
- Supports and embodies values defined in the City's [Strategic Plan](#).
- Plans, coordinates, and directs the operation of City departments and programs and oversees the evaluation of service delivery, including shared service arrangements, to improve operational effectiveness.
- Submits policy proposals to the City Council and provides the governing body with facts, advice, and policy options for making decisions and setting community goals.
- Encourages cross-functional cooperation, learning, initiative, and collaboration among departments with support from the management team to develop leadership skills and retain talent.
- Oversees the budget development process and works with the City Council and department heads to allocate resources in accordance with City plans. Presents the City's annual operating budget to the City Council for approval.
- Meets with and advises the City Council on matters related to City operations, policies, and financial position, keeps elected officials apprised of emerging issues.
- Provides managerial oversight, direction, and leadership to City staff. Appoints, removes, promotes, transfers, disciplines, or suspends City employees (except police and fire personnel).
- Is accessible to the City Council, municipal officials, employees, community leadership, and members of the public.
- Engages in intergovernmental relations and collaborative partnerships with other cities and public and private organizations.
- Serves as a liaison between the City and civic groups; private residents; the media; local, state, and federal agencies; and neighborhood organizations.
- Directs and provides oversight for the development, administration, and maintenance of the City's physical facilities and assets.
- Abides by federal and state laws and City ordinances, exemplifies high ethical standards in keeping with the leadership responsibilities of the position.
- Represents the City in local, regional, and state meetings and functions as directed by the City Council.
- Coordinates with other governmental units, including county, state, and federal authorities, in matters related to future developments which affect the City.





Desired Capabilities

- Conveys a deep passion and enthusiasm for the City of Eau Claire in its entirety
- Provides visionary leadership that inspires, acts as a catalyst in the creation and execution of actionable plans
- Creative and forward-looking, recognizes the City's potential and inspires the organization to try new ideas
- Demonstrates a commitment to incorporating antiracist and equity frameworks into decision-making, policy implementation, community relations, and staff management
- Communicates and listens effectively, demonstrates compassion, and makes sure that people are heard and valued
- Interacts effectively with people from different cultural backgrounds, protected classes, and other aspects of human diversity
- Thinks strategically; takes the long view to ensure the continuous improvement and financial sustainability of City programs and services
- Builds a trusted relationship with the City Council; provides informational support and actively engages the City Council in policy decisions
- Navigates the political environment without being political
- Collaborates and builds partnerships to tackle complex issues, shares decision-making with others
- Engages and effectively taps the collective expertise of the senior management team
- Empowers employees and delegates clear expectations and accountabilities
- Values and interacts regularly with employees at all levels of the organization; readily acknowledges employee contributions and accomplishments
- Fair, confident, and self-assured, has the fortitude to make decisions that may not be popular

Leadership Opportunities

Organizational strategic alignment. From the City's structure and resource allocation to its culture and processes, the City Manager will work collaboratively to create opportunities that increase organizational alignment with the City's [Strategic Plan](#).

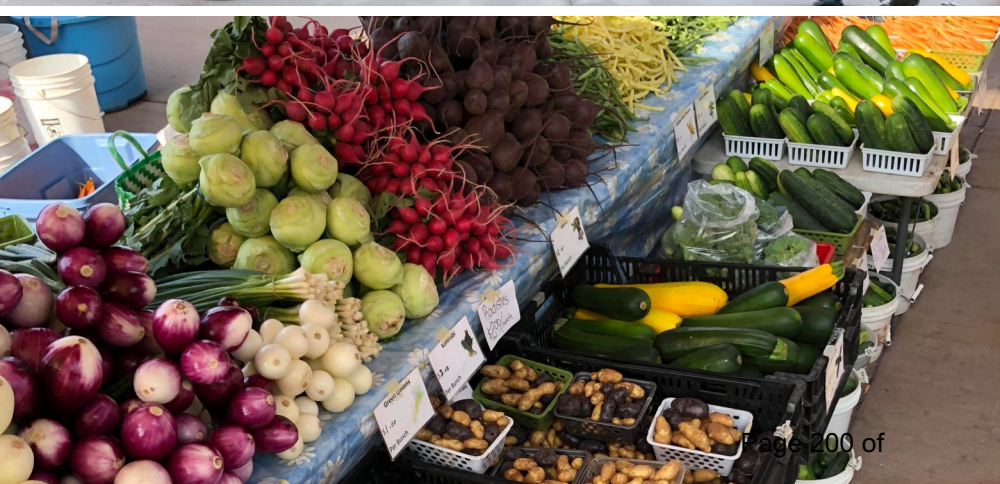
Fiscal health and transparency. Exercising prudent fiscal management, the City Manager will advise the City Council on the fiscal impacts of policy options and create an organizational climate that encourages continuous improvement to achieve greater operational effectiveness and efficiency. With attention to the City's long-term fiscal health, the City Manager will ensure that information on the City's financial performance is readily available to the public.

Budgeting. With input from elected officials and senior directors, the City Manager will develop and present a budget that addresses growing demands for services within state levy limits. The City Manager will also use participatory budgeting and other budget processes to align the budget with strategic goals and citizen needs.

Civic engagement. The City Manager will incorporate opportunities in the City's public processes for outreach with all segments of the community. In collaboration with others, the City Manager will work with community, business, and faith-based organizations and citizens to address community-wide issues such as anti-racism efforts, housing, homelessness, and economic prosperity.

Economic development and job creation. As a regional center, Eau Claire is well-positioned to attract economic growth and create jobs with livable wages. The City Manager will promote community development and the continuation of downtown revitalization projects.

Sustainability. The City Manager will take a broad view of sustainability from both a community economic and environmental perspective. Working towards a goal of 100 percent renewable energy by 2050, the City Manager will encourage new programs and innovative practices in managing the City's infrastructure.



Qualifications and Experience

Qualified candidates must have a Bachelor's degree in public or business administration or a related field; a Master's degree is strongly preferred, and demonstrate extensive responsible local government management experience as a City Manager, Assistant City Manager, Department Director or an equivalent position in a comparable organization. ICMA-Credentialed Public Manager designation is a plus. 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, engaging citizens, and incorporating an equity, diversity and inclusion framework into policy-making and implementation, community relations, and staff management.



Compensation and Benefits

Compensation for the City Manager position will be up to \$175,000 commensurate with the qualifications and experience of the successful candidate. The City offers competitive benefits and participates in the Wisconsin Retirement System. Reasonable relocation expenses are negotiable.



Application and Selection Process

Qualified candidates please submit your cover letter and resume online by visiting our website at:

<https://bakertilly.recruitmenthome.com/postings/2670>

This position is open until filled; first review of resumes occurs on August 28, 2020. Following this date, applications will be screened against criteria outlined in this brochure. For more information or to request accommodations, please contact Sharon Klumpp at sharon.klumpp@bakertilly.com or 651-223-3053.

For more information about Eau Claire, visit: <https://www.eauclairewi.gov/>

The City of Eau Claire is an Equal Opportunity Employer. We promote excellence through diversity and encourage all qualified applicants to apply.



380 Jackson Street, Suite 300

St. Paul, MN 55101

651-223-3000

bakertilly.com



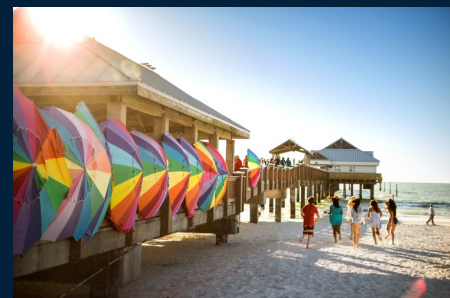
PINELLAS COUNTY, FLORIDA *IS SEEKING A* COUNTY ADMINISTRATOR



THE COMMUNITY

Pinellas County, home to some of the most beautiful beaches in the country, is a peninsula at the midpoint of the west coast of Florida, bordered by the Gulf of Mexico on the west and by Tampa Bay on the east. While it is the second smallest county in land area, it is the most densely populated county in the state with a permanent population of over 970,637. More than 287,000 residents currently live in unincorporated areas that exceed more than one-third of Pinellas' total land mass. Pinellas is well connected with regional access provided via Interstate 275, two international airports, and the largest port in Florida. There are 24 incorporated municipalities, including St. Petersburg, with a population of 249,000+, followed by the county seat, Clearwater with nearly 110,000 residents. Although the area is a world class tourist destination, Pinellas has the second largest base of manufacturing employment in Florida and a diverse business climate with significant existing and targeted industry clusters in aviation/aerospace; defense/national security; medical technologies; financial services; and information technology. Notable employers include: Home Shopping Network (HSN), Nielsen Media Research, Jabil Circuit, Raymond James Financial, Tech Data, Honeywell, Raytheon, Lockheed-Martin, ConMed Linvatec, TransAmerica and Bausch & Lomb.

Professional sports fans have Major League Baseball's Tampa Bay Rays, the National Football League's Tampa Bay Buccaneers, the National Hockey League's 2004 Stanley Cup Champion Tampa Bay Lightning, and the Tampa Bay Rowdies, an American professional soccer team of the United Soccer League, from which to choose. The area is also known as baseball's spring training capital and is home to the Philadelphia Phillies and Toronto Blue Jays, with nine teams training within an hour's drive. There are numerous cultural venues to attract residents and visitors to world class museums, symphony performances, Broadway shows, rock concerts, and ballet and art festivals. The Mahaffey Theater - The Duke Energy Center for the Arts features a visual and performing arts center in St. Petersburg, and the Salvador Dali Museum is home of the largest collection of Dali's works outside Europe.





COUNTY ORGANIZATION

Pinellas County is a Charter County of the State of Florida providing a full range of government services. A variety of traditional municipal-type services are provided to the unincorporated areas of the County within the Municipal Services Taxing District. The Board of County Commissioners is the legislative body for Pinellas County. Three Commissioners are elected at large but live in specific districts; four commissioners are elected from single-member districts. The Constitutional Officers of the County are the Clerk of the Circuit Court, Property Appraiser, Sheriff, Supervisor of Elections and Tax Collector.

Pinellas County's Unified Personnel System (UPS) was established in 1975 by a special act of the Florida Legislature. The UPS is composed of 11 different members or "Appointing Authorities" and has over 3000 employees with more than 600 job classifications. The Sheriff's Department is no longer included among the Appointing Authorities. The UPS is operated by a Personnel Board consisting of seven members, each serving a two-year term. The Director of Human Resources is appointed by and serves at the discretion of the UPS Board.

In FY2018, Pinellas County operations - including the Sheriff, are supported by a combined funds budget of \$2.2 billion, providing a full range of traditional county and municipal-type services. Each Appointing Authority oversees the management and supervision of functions under their areas of responsibility. The Board of County Commissioners appoints a County Administrator who is responsible for management and supervision of all functions and personnel under the Board of County Commissioners.

THE COMMUNITY (CONTINUED...)

Clearwater's Ruth Eckerd Hall: Richard Baumgardner Center for the Performing Arts offers a wide array of cultural activities. There are rich offerings at county and community parks including art shows, open air concerts and Clearwater's Jazz Holiday, known as one of the South's premier jazz festivals. A host of shows and activities for all ages are available at the local community theaters, professional theaters and museums. Pinellas County is also home to the Clearwater Marine Aquarium, the Valspar PGA Championship, and the Firestone Grand Prix of St. Petersburg.

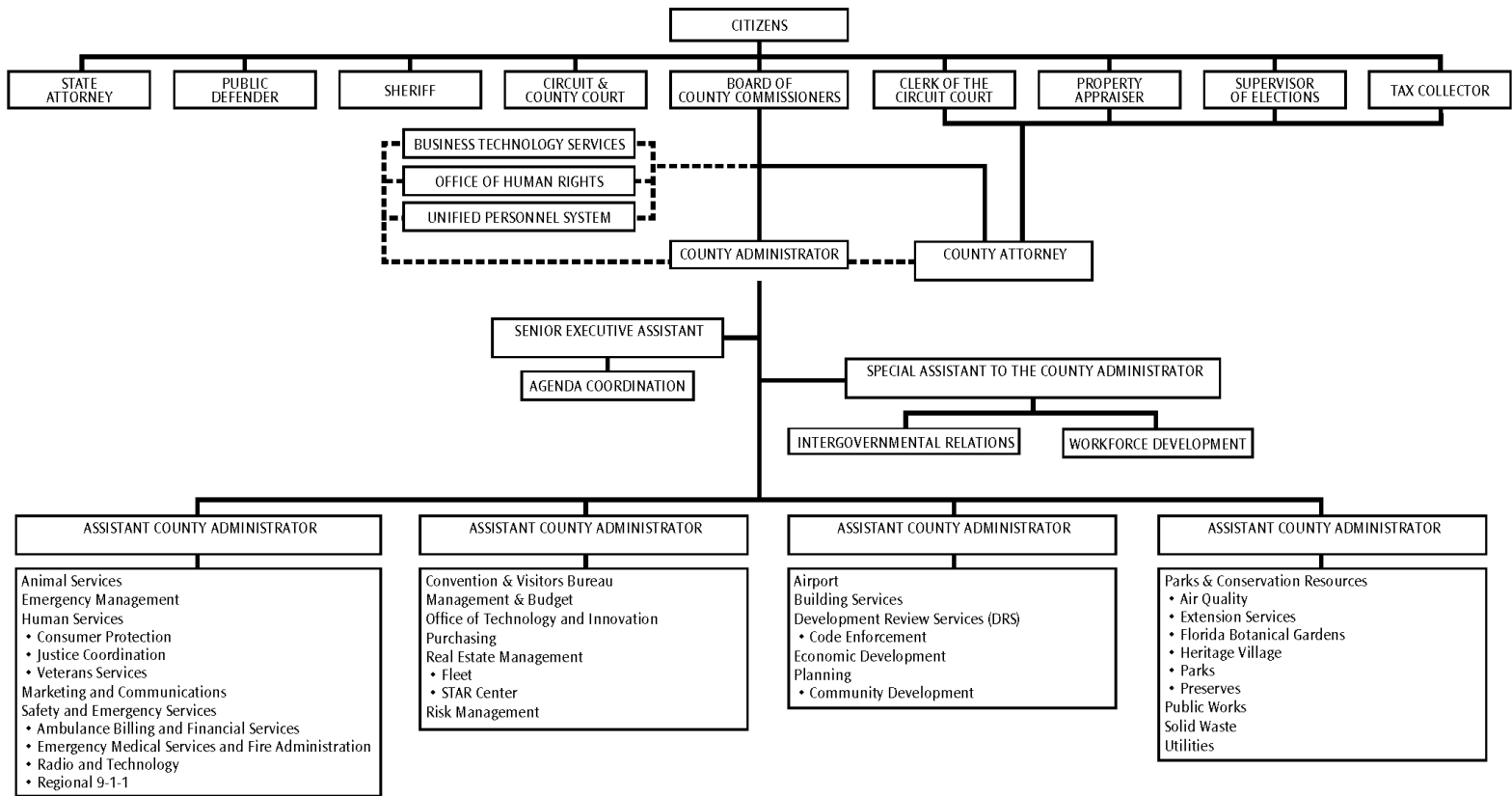
Each year over 5 million overnight visitors come to enjoy the County's 35 miles of pristine, powdery white beaches with an average of 244 sunny days annually. The County's Parks and Conservation Resources Department maintains over 24 parks consisting of 4,000 acres of beaches, lakes, and native habitat with playgrounds, learning centers for residents and visitors alike. The area has three major golf courses and about 40 additional courses for year-round golf lovers. Pinellas County, rich in cultural diversity, takes great pride in celebrating St. Petersburg's Annual MLK Dream Big Parade and Family Fun Day, the nation's longest-running parade honoring Dr. Martin Luther King, Jr. The County benefits from a unique and vibrant social fabric that embraces the values of diversity and inclusion evidenced by a growing Hispanic population in Clearwater, the highest percentage of Greek Americans for any city in the United States living in Tarpon Springs, and the popularity of the LGBT sponsored St. Pete Pride Parade held to celebrate the power and beauty of diversity, with more than 200,000 attending each June.

The County offers quality public schools, governed by an elected school board and appointed superintendent, with a broad variety of educational options including magnet programs, educational gifted programs, alternative schools, exceptional schools, and workforce development programs. In addition, there are a number of private and parochial schools in the area. Post-secondary education opportunities in the area include the University of South Florida, with campuses in Tampa and St. Petersburg, Eckerd College, and St. Petersburg College. Stetson University's College of Law is located in Gulfport, and Pinellas Technical College with campuses in St. Petersburg and Clearwater, provides students with information technology, robotics/computer-aided technology and other vocational training programs.





Government Organizational Chart



VISION

- To Be the Standard for Public Service in America.
- To achieve our vision we place the highest importance on:
 - Quality Service
 - Respectful Engagement
 - Responsible Resource Management

MISSION

Pinellas County Government is committed to progressive public policy, superior public service, courteous public contact, judicious exercise of authority, and responsible management of public resources to meet the needs and concerns of our citizens today and tomorrow.

PINELLAS COUNTY STRATEGIC PLAN GOALS

- Deliver First Class Services to the Public and Our Customers
- Ensure Public Health, Safety, and Welfare
- Practice Superior Environmental Stewardship
- Foster Continual Economic Growth and Vitality
- Create a Quality Workforce in a Positive, Supportive Organization

COUNTY ADMINISTRATOR POSITION

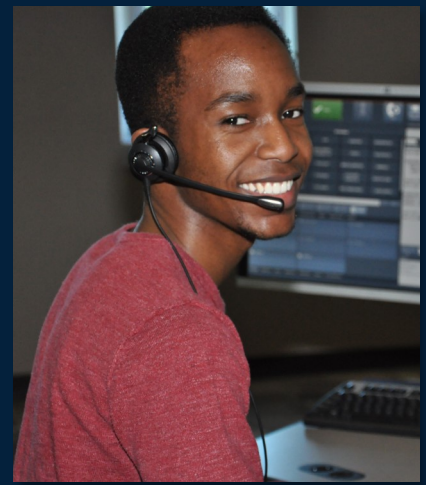
The County Administrator is responsible for managing the administration and operation of all functional areas and administrative divisions under the Pinellas County Board of County Commissioners and is directly responsible for over 2000 County employees. The County Administrator is also responsible for preparation of the County's overall budget, as well as for monitoring and tracking expenditures throughout the fiscal year. The County Administrator is appointed by a majority vote of the Board of County Commissioners. The functional areas and services that fall under the responsibility of the County Administrator include a variety of internal services such as Purchasing, Office of Technology and Innovation, Budget, Fleet and Risk Management. Other County Departments include Emergency Management, Real Estate, Marketing and Communications, Human Services, Animal Services, Emergency Medical Services, Regional 9-1-1, Convention and Visitors Bureau, Airport, Building Services, Code Enforcement, Planning, Economic Development, Development Review Services, Parks & Conservation Resources, Public Works, Solid Waste, and Utilities.



PRIORITIES AND CHALLENGES

The following list is representative of the challenges and priorities the new County Administrator will need to address within the first twelve to eighteen months on the job. This list was compiled after discussions with the Board of County Commissioners.

- Continue balancing the budget and achieving sustainability while maintaining the highest quality services
- Implement \$1.1 billion voter approved infrastructure improvements – Penny for Pinellas
- Support regional transportation projects
- Continue improving relations with Pinellas County's many public and private partners
- Facilitate continued assessment and implementation of affordable housing options
- Create work environment that encourages employee development, retention, and opportunities for advancement
- Renegotiate and implement electrical purchased power agreement with Duke Energy
- Facilitate regional conversations about water, transportation and other partnerships
- Continue seeking input from citizens using a multitude of methods such as town hall meetings, social media alerts and surveys, etc.

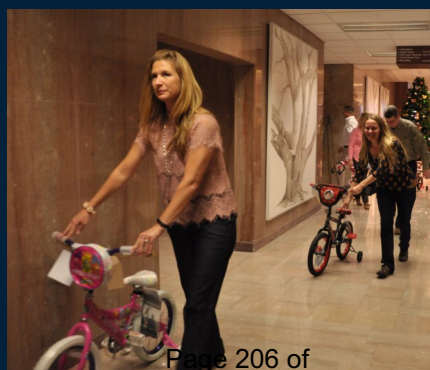


CANDIDATE PROFILE



The following list reflects the leadership, management style and personal characteristics desired in the ideal candidate:

- A record of exceptional leadership based on experience and knowledge
- Unquestioned personal and professional ethics
- An ability to effectively communicate with the Board of County Commissioners, Constitutional Officers, citizens, civic and business leaders, employees, and other city and county leaders throughout the region
- Experience managing a growing community and in negotiating successfully on behalf of the Board of County Commissioners with other cities, developers, attorneys, business owners, vendors, and other government and nonprofit agencies
- Knowledge and experience working with economic development policies, public incentives and other tools
- Outstanding interpersonal skills and a willingness to listen to other points of view without being offended
- Ability to engage in frank and respectful discussions with members of the Board of County Commissioners and all stakeholders and employees
- Patience, good instincts, excellent judgement, and the ability to say “no” when necessary
- A collaborative management approach which respects community and organizational traditions, while at the same time, moves the organization forward in a positive direction
- Empower and inspire employees to seek continuous improvement
- Be receptive to and embrace new technologies in an effort to promote innovation throughout the organization
- Ability to remain neutral even in politically-charged situations
- Possess the capacity to build a strong and cohesive workforce, constantly seeking input to improve the organization
- Believes in and practices transparency
- Utilizes humor in an appropriate manner and conducts their work with humility
- Approaches every initiative and project in a collaborative manner and conducts their work exhibiting the highest levels of integrity ensuring the long-term success for the Pinellas County organization, community, and Tampa Bay region



QUALIFICATIONS AND EXPERIENCE

The ideal candidate will possess a bachelor's degree in public or business administration, management, government, or a related field, and 7 years of progressively responsible experience in municipal or county government, or an equivalent combination of education, training, and/or experience. A masters' degree in public or business administration, or a related field is desired. Working for a similar sized municipal or county organization, or an organization of similar complexity, in an executive and management capacity is important and will be an advantage. A strong background in municipal budgeting, finance, and strategic planning is important.



COMPENSATION

A competitive starting salary based on the successful candidate's qualifications and experience will be offered, with the range extending from **\$212,000 to \$275,000** (Florida does not have a state income tax). Pinellas County offers a comprehensive and outstanding array of employee benefits. The County participates in the Florida Retirement System (FRS). The County provides a competitive retirement contribution with the employees' contribution set at 3% of gross salary. The County also offers an optional deferred compensation (IRS Section 457) plan, and provides Life Insurance, Short-Term Disability, Long-Term Disability, Group Health (choice of PPO or an HSA plan with employer account contributions), Prescription Drug Plan, Employee Assistance Program, Vision Care Program, and a choice of Dental Care Plans, either PPO utilizing any dental provider or a dental HMO. Paid Time Off includes 9 to 11 paid holidays per year, two paid floating holidays, plus two paid personal days per calendar year. Annual leave is provided for vacation, short-term illness, medical and dental appointments and personal emergencies. Visit <http://www.pinellascounty.org/hr/whatweoffer/> for Pinellas County's comprehensive and competitive array of employee benefits.



APPLICATION AND SELECTION PROCESS

Interested applicants should submit a cover letter and resume on-line at <https://springsted-waters.recruitmenthome.com/postings/1932>. This position is open until filled; **First review deadline is Friday, June 15, 2018**. Applications will be screened in relation to criteria provided in the recruitment brochure. The Board of County Commissioners will consider offering interviews to those candidates named as Finalists, with reference checks, background checks, and academic verifications conducted after receiving candidates' permission. For more information, please contact Art Davis at adavis@springsted.com or 816-868-7042.

Pinellas County is an Equal Opportunity Employer (EOE) and values diversity at all levels of its workforce!

Confidentiality: Under Florida's Public Records Act, information from your application is subject to public disclosure at any point in the recruitment process. For more information about Pinellas County, visit the website at www.pinellascounty.org.

 **Springsted Waters**
Executive Recruitment

14285 Midway Road, Suite 340 Phone: 972-481-1950
Addison, TX 75001 Fax: 972-481-1951
Springsted
380 Jackson Street, Suite 300 Phone: 651-223-3000
Saint Paul, MN 55101 Fax: 651-223-3002

Serving
**LOCAL GOVERNMENT
& ORGANIZATIONS**





Final Report

City of Sample, Texas

City Manager

Executive Recruitment

February 28, 2020

Baker Tilly
14285 Midway Road, Suite 340
Addison, TX 75001



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Interview Schedule

Section IV • Candidate Profiles

Candidate Name

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Resume
Candidate Questionnaire
Professional Narratives
Reference Report
Suggested Interview Questions
Candidate Assessment

Candidate Name

Cover Letter
Resume
Candidate Questionnaire
Professional Narratives
Reference Report
Suggested Interview Questions
Candidate Assessment



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Springsted and Umbaugh

Candidate Name

Cover Letter

Resume

Candidate Questionnaire

Professional Narratives

Reference Report

Suggested Interview Questions

Candidate Assessment



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Section I • Introduction



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Introduction

The structured interview can be the best tool for evaluating candidates for a position with The City of Sample, particularly in today's litigious society. This section has been prepared to assist interviewers by providing guidance and suggestions for interviewing candidates.

Legal Issues

In preparing for the discussion with the candidate, it is important to remember the interview is a very critical part of the employment process and is covered by anti-discrimination laws.

Summary of Protected Classes

The purpose of state and federal laws regarding discrimination in employment is to ensure hiring decisions are based upon the applicant's ability to perform the job, not on arbitrary factors unrelated to job performance. In general, it is unlawful to base a decision to hire or not hire an applicant on any of the following criteria: race, color, creed, religion, national origin, gender, marital status, familial status, disability, public assistance, age, sexual orientation, or local Human Rights Commission activity.

Questions based upon any of these elements may open The City of Sample to potentially costly claims for discrimination. It is illegal to base a decision on one of these criteria, even if the information is obtained outside of the interview process, or inadvertently during the interview.

The development of specific interview questions not only assures all important aspects of the job are covered during the interview, it helps to ensure that interviewers avoid potentially dangerous subjects.

Illegal Interview Questions to Avoid

Various federal and state laws regulate questions that The City of Sample, as an employer, can ask a candidate. Interview questions must be related to the job the candidate has applied for—the interviewer's focus must be: "What do I need to know to decide whether or not this person can perform the functions of the job?"

Examples of illegal questions are listed on the following page. This is not, by any means, a complete list - but can serve as a guide for types of questions to avoid.



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Suggested Questions

Interviewing Techniques



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Additional Questions

Other Considerations



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Section II • Brochure



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City Manager Brochure



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Section III • Interview Schedule



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City of Sample, Texas

City Manager

Interview Schedule

Date

Day 1 Date

Introduction & Roadmap	Ten (10') minutes before scheduled interviews or day before
------------------------	---

	Room TBD	Room TBD	Room TBD
	8:00 AM - 8:30 AM	8:45 AM - 9:15 AM	9:30 AM - 10:00 PM
Mayor Name	Candidate 1	Candidate 2	Candidate 3
Councilwoman Name*	Candidate 3	Candidate 1	Candidate 2
Councilwoman Name	Candidate 2	Candidate 3	Candidate 1

* Available until 11:00 AM

	Room TBD	Room TBD	Room TBD
	10:15 PM AM - 10:45 PM	11:00 AM - 11:30 AM	11:45 AM - 12:15 PM
Councilmember Name	Candidate 1	Candidate 2	Candidate 3
Councilwoman Name	Candidate 3	Candidate 1	Candidate 2
Councilman Name	Candidate 2	Candidate 3	Candidate 1

LUNCH WITH CHARTER OFFICERS	12:30 PM - 1:15 PM
-----------------------------	--------------------

	Room TBD	Room TBD	Room TBD
	1:30 PM - 2:00 PM	2:15 PM - 2:45 PM	3:00 PM - 3:30 PM
Councilwoman Name	Candidate 1	Candidate 3	Candidate 2

City of Sample, Texas

City Manager

Interview Schedule

Date

Day 2 Date

SOFT DRINKS & COOKIES RECEPTION

4:30 PM - 4:55 PM

Presentation to Council - Public Meeting

5:00 PM - 5:45 PM

Call to order introduction of 3 finalists

City Council

5:00 PM - 5:09 PM

Candidate 1

Presentation

5:10 PM - 5:25 PM

Candidate 2

Presentation

5:26 PM - 5:41 PM

Candidate 3

Presentation

5:42 PM - 5:56 PM

Executive Session - Deliberations - Possible Council Action

6:00 PM - 7:00 PM

Open public meeting - Council Action if needed

7:15 PM - 7:25 PM

Adjourn

7:30 PM



Candidate Name

CANDIDATE COVER LETTER



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CANDIDATE RESUME



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Your Name

Mailing Address

Business Phone:

Mobile Phone:

Preferred E-mail:

(Baker Tilly uses the above information to communicate with candidates unless otherwise instructed by said candidate)

	1. a. b. 2. a. b. 3. a. b.
	1. 2. 3. 4. 5. 6.

EDUCATIONAL/PROFESSIONAL ACHIEVEMENTS 1. Education (List All Degrees & Institutions) 2. Licenses 3. Professional Certifications 4. State Bar License if applicable 5. Specialized / Advanced Training	1. 2. 3. 4. 5.
---	----------------------------

SECTION 2

1.	
Answer:	
2.	
Answer:	
3.	
Answer:	
4.	
Answer:	
5.	
Answer:	
6.	
Answer:	

**CITY OF SAMPLE, TEXAS
CITY MANAGER SEARCH
CANDIDATE QUESTIONNAIRE**

7.	
Answer:	
8.	
Answer:	
9.	
Answer:	
10.	
Answer:	
11.	
Answer:	
12.	
Answer:	
13.	

	NOTE: We will render your application ineligible, if during the course of our review and due diligence, we become aware or discover <u>ANY</u> information an applicant fails, forgets, withholds or otherwise not disclose, and brought to our attention.
Answer:	
14.	
Answer:	
15.	
Answer:	
16.	
Answer:	
17.	
Answer:	

Professional Narratives Request

NAME:

PROFESSIONAL ACHIEVEMENT

CRITICAL PROBLEM

CONFIDENTIAL REFERENCE REPORT

Reference Relationship: 1. Supervisor 2. Peer 3. Subordinate 4. Supervisor	
<u>Questions</u>	<u>Answers</u>
1. What is your professional relationship to the candidate and how long have you worked with them?	1. 2. 3. 4.
2.	1. 2. 3. 4.
3.	1. 2. 3. 4.
4.	1. 2. 3. 4.
5.	1. 2. 3. 4.
6.	1. 2. 3. 4.
7.	1. 2. 3. 4.
8.	1. 2. 3. 4.
9.	1. 2. 3.

SAMPLE, TEXAS
EXECUTIVE RECRUITMENT
CITY MANAGER
CANDIDATE NAME

	4.
10.	1. 2. 3. 4.

SUGGESTED INTERVIEW QUESTIONS

1. Tell us about your education, experience and any special accomplishments, or professional certification or training that makes you the ideal candidate for this position.
2. Why are you interested in becoming the City of SAMPLE City Manager?
- 3.
- 4.
- 5.
- 6.
- 7.
- 8.
- 9.
- 10.
- 11.
- 12.

13.

14.

15.

16.

17.

18.

19.

20.

21.

22.

23.

24.

25.

CITY OF SAMPLE, TEXAS
EXECUTIVE SEARCH
CITY MANAGER

CANDIDATE REVIEW SHEET

Finalist Name

Interviewers Initials

	Acceptable 1	Good 2	Excellent 3	Superior 4
1.				
2.				
3.				
4.				
5.				
6.				
7.				
8.				
9.				
10.				

Please Use Reverse Side for Comments.

**CITY OF SAMPLE,
TEXAS EXECUTIVE
SEARCH CITY
MANAGER**

[illegible]



Candidate Name



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Professional Reference Request

Please provide us with a list of at least six professional references. **Please advise your contacts that we may be contacting them shortly.**

Please include contact information for at least one (1) reference for the following categories: a peer from a collaborating agency, a board member, a supervisor, a direct report and a community member. All references should have worked with you in a professional capacity.

Your Name:	
-------------------	--

1.	Reference Name			
	Title			
	Organization			
	Relationship			
	Preferred Phone		Email	
Brief statement regarding your professional relationship, including the number of years that you have worked together.				

2.	Reference Name			
	Title			
	Organization			
	Relationship			
	Preferred Phone		Email	
Brief statement				

3.	Reference Name			
	Title			
	Organization			
	Relationship			
	Preferred Phone		Email	
Brief statement				

4.

Reference Name			
Title			
Organization			
Relationship			
Preferred Phone		Email	
Brief statement			

5.

Reference Name			
Title			
Organization			
Relationship			
Preferred Phone		Email	
Brief statement			

6.

Reference Name			
Title			
Organization			
Relationship			
Preferred Phone		Email	
Brief statement			

7.

Reference Name			
Title			
Organization			
Relationship			
Preferred Phone		Email	
Brief statement			

**Baker Tilly**

14285 Midway Road, Suite 340
Addison, TX 75001
Phone:
Email:
Fax:

Profile Information

Name:
SSN:
DOB:
Reference:
Street:
City:
State:
Zip:

*** Document(s) Attached**

The following are included in this report:

Search Type	Detail	Status
Past Address History		Complete
Instant National Criminal Search		Complete - No Record
County Criminal/Other Public Records Search		Complete - No Record
County Criminal/Other Public Records Search		Complete - No Record
Federal Criminal/Other Public Records Search		Complete - No Record
Federal Criminal/Other Public Records Search		Complete - No Record
Education Verification		Verified
Education Verification		Verified
Driving History Report (MVR)		Complete
Credit Report		Complete

Past Address History

Social Security Number
Name
DOB
Search ID
Reference
Date Ordered

Date Completed**Results**

This search was performed for location purposes

Instant National Criminal Search

Jurisdiction Searched**Name Searched****DOB****SSN****Search ID****Reference****Date Ordered****Date Completed****Results**

No Records Found

County Criminal/Other Public Records Search

Jurisdiction Searched**Name Searched****DOB Searched****SSN Searched****Search ID****Reference****Date Ordered****Date Completed****Records Searched****Status****County Criminal/Other Public Records Search**

Jurisdiction Searched**Name Searched****DOB Searched****SSN Searched****Search ID****Reference****Date Ordered****Date Completed****Records Searched****Status****Federal Criminal/Other Public Records Search**

Jurisdiction Searched**Name Searched****DOB Searched****SSN Searched****Search ID****Reference****Date Ordered****Date Completed****Status****Years Searched**

Federal Criminal/Other Public Records Search

Jurisdiction Searched**Name Searched****DOB Searched****SSN Searched****Search ID****Reference****Date Ordered****Date Completed****Status****Years Searched****Education Verification**

Name Searched**DOB****SSN****Search ID****Reference****Date Ordered****Date Completed****Verification Type****Status****Information Provided**

School

Degree

Major

Location

Name Used While Enrolled

Verification Type

Information Searched

School

Location

Information Verified

Degree

Major

Graduation Date

Comments

Verified by National Student Clearinghouse

Education Verification

Name Searched**DOB****SSN****Search ID****Reference****Date Ordered****Date Completed****Verification Type****Status****Method of Verification**

Name, DOB, and SSN

Information Provided

School

Degree

Location

Name Used While Enrolled

Verification Type

Graduation

Information Verified

Comments

Information Verified

Individual:

Organization:

Degree:

Awarded:

Major:

Dates of Attendance:

Transaction Id:**Driving History Report (MVR)**

State**License****Name Searched****DOB Searched****SSN Searched****Search ID****Reference****Date Ordered****Date Completed****Years searched****Results**

Host Used:	Online	Bill Code:	
Rec Type:	FIVE YEAR	Reference:	
		License:	
		Name:	
		Address:	
		City, St:	

Sex:	Weight:	DOB:	Age:
Eyes:	Height:	Iss Date:	
Hair:		Exp Date:	

Additional Information

CONFIDENTIAL INFORMATION - TO BE USED AS PER STATE AND FEDERAL LAWS.
MISUSE MAY RESULT IN A CRIMINAL PROSECUTION

END OF REPORT FOR

(CONTROL NUMBER:

Credit Report

Name Searched
DOB Searched
SSN Searched
Search ID
Reference
Date Ordered
Date Completed

Results

TRANS UNION REPORT - PEER

Exact Match between SSN on input and SSN on file.

Personal Information Since 10/1/1985 FAD		
		Reported
Name AKA AKA SSN Address Address Address		

Employment				
		Date Hired	Date Separated	
Employer				
Employer				
Employer				

Revolving Accounts												
				Current Status			Hist Status					
Acc Name/Address	Rptd DLA ECOA	Opened Clsd/PD	High Limit	Pmt Term	\$Bal	\$Past Due	Date	Mths	30	60	90	Rating
Subscriber: Loan Type: Charge Account Remarks: Inactive account						0	48 00 00 00 111111111111 111111111111 111111111111 111111111111					R1
Subscriber: Loan Type: Credit Card Max Del:						0	13 01 01 00 111113211111 1					R1
Subscriber: Loan Type: Credit Card Remarks: Account closed by credit grantor Max Del:						0	47 01 02 01 111111111111 111111111111 143321111111 111111111111					R1
Subscriber: Loan Type: Credit Card Remarks: Account closed by credit grantor						0	48 00 00 00 111111111111 111111111111 111111111111 111111111111					R1

Subscriber: Loan Type: Credit Card						0	39 00 00 00 111111111111 111111111111 111111111111 111	R1
Subscriber: Loan Type:						0	48 00 00 00 111111111111 111111111111 111111111111 111111111111	R1
Subscriber: Loan Type: Charge Account Remarks: Account closed by consumer						0	48 02 00 00 112111111111 111111111111 111111111111 111121111	R1
Subscriber: Loan Type: Charge Account						0	48 04 00 00 111111112111 111211112111 111111111111 112111111111	R1
Subscriber: Loan Type: Credit Card						0	19 01 00 00 111111111111 1121111	R1
Subscriber: Loan Type: Credit Card Max Del:						0	48 02 01 00 111113211111 111111112111 111111111111 111111111111	R1
Subscriber: Loan Type: Credit Card Remarks: Account closed by credit grantor					0	0	47 01 00 00 111111111112 111111111111 111111111111 111111111111	R1
Subscriber: Loan Type: Charge Account Remarks: Purchased by another lender					0	0	12 01 00 00 111211111111	R1
Subscriber: Loan Type: Credit Card Remarks: Account closed by consumer					0	0	48 00 00 00 111111111111 111111111111 111111111111 111111111111	R1
Revolving Totals								

Installment Accounts

				Current Status			Hist Status					
Acc Name/Address	Rptd DLA ECOA	Opened Clsd/PD	High Limit	Pmt Term	\$Bal	\$Past Due	Date	Mths	30	60	90	Rating
Subscriber: Loan Type: Automobile						0	26 00 00 00 111111111111 111111111111 11					I1

Subscriber: Loan Type: Automobile					0	0	48 01 00 00 111111211111 111111111111 111111111111 111111111111	I1
Subscriber: Loan Type: Conventional Real Estate Mortgage Remarks: Closed					0	0	16 00 00 00 111111111111 1111	I1
Subscriber: Loan Type: Automobile Remarks: Closed					0	0	48 00 00 00 111111111111 111111111111 111111111111 111111111111	I1
Installment Totals								

Inquiries					
Date	Name/Address	Code	MKT	Type Inq/Loan	Amount
				I Employment	
				I	
				I	
				I	

END OF REPORT - TRANS UNION -

First Name	Last Name	Source?	Education	Experience	REDACTED	Specialty?	Self Reported Proficiency?	Knowledge of ***** of *****, and ***** Procedure?	Knowledge of the ***** City Charter, City Code, and City *****?
Susan	REDACTED	Redacted Information Association website	JD, Ph. D, Ed. D, or similar	10 - 14 years	I have a current license and in good standing	detail	Expert	Advanced	Basic
Bill	REDACTED	Redacted friend who *Redacted.	JD, Ph. D, Ed. D, or similar	10 - 14 years	I have a current license and in good standing	detail	Expert	Expert	Basic
James	REDACTED	I currently work for redacted and received REDACTED letter notifying the REDACTED	JD, Ph. D, Ed. D, or similar	10 - 14 years	I have a current license and in good standing	detail	Expert	Expert	Advanced
Daniel	REDACTED	REDACTED Association listserve	JD, Ph. D, Ed. D, or similar	15 or more years	I have a current license and in good standing	detail	Expert	Expert	Advanced
Rolly	REDACTED	REDACTED Jobs Board	JD, Ph. D, Ed. D, or similar	15 or more years	I have a current license and in good standing	detail	Advanced	Basic	Basic
Richard	REDACTED	I received an email.	JD, Ph. D, Ed. D, or similar	15 or more years	I have a current license and in good standing	detail	Advanced	Advanced	Basic
Michelle	REDACTED	REDACTED List Serve	JD, Ph. D, Ed. D, or similar	15 or more years	I have a current license and in good standing	detail	Expert	Expert	Advanced
Charles	REDACTED	Referred by REDACTED employees, received posting by email, articles in local newspaper.	JD, Ph. D, Ed. D, or similar	15 or more years	I have a current license and in good standing	detail	Expert	Expert	Advanced

NAME	
Confirm Employment	
Social Media	
Fired	
Resign	
Lawsuit	
Arrest	
DUI/DWI	
YouTube	
Notes	

NAME	
Confirm Employment	
Social Media	
Fired	
Resign	
Lawsuit	
Arrest	
DUI/DWI	
YouTube	
Notes	

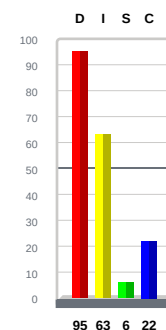
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YouTube	
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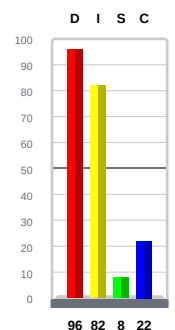
Behavioral Feedback

Candidate may lose interest in a project once the challenge ceases. She may then be ready for another challenging project. Many people see her as a self-starter dedicated to achieving results. She may be so self-confident that others see her as arrogant. This confidence may be something others wish they had. She is aggressive and confident. Candidate wants to be viewed as self-reliant and willing to pay the price for success. She is often frustrated when working with others who do not share the same sense of urgency. She is often considered daring, bold and gutsy. She is a risk taker who likes to be seen as an individualist. She is the type of individual who, under pressure, has a tremendous sense of urgency and need to get things done.

Adapted Style



Natural Style



Candidate Name



TTI
SUCCESS
INSIGHTS®

TriMetrix® DNA

Gap Report

CANDIDATE NAME
Position Title

11-18-2019

Baker Tilly
14285 Midway Road, Suite 340
Addison, Texas 75001
(972) 481-1950
www.bakertilly.com



now joined with
Springsted and Umbaugh

NEW
25



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Introduction

Long-term superior performance is directly related to job fit. Job fit, in simple terms, is having the talent that the job requires.

Most people match some, but not necessarily all, job requirements. When this happens, we have a gap. The gap is nothing more than an area for development.

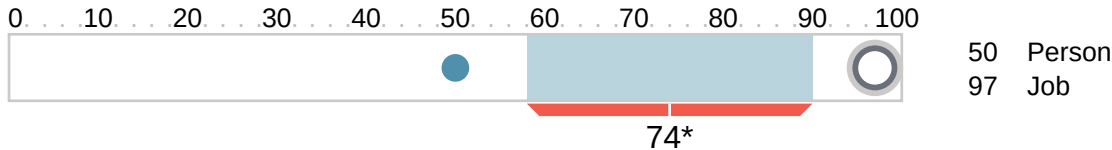
This report makes it easy for both manager and subordinate to discuss and develop a plan for personalized development.



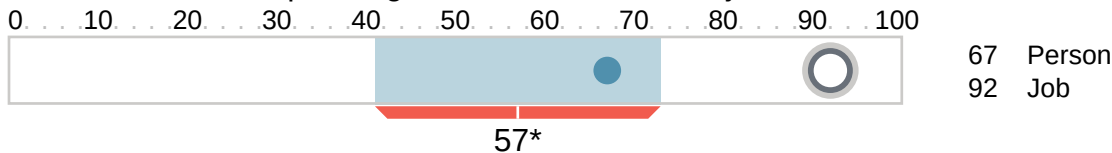
Job Competencies Hierarchy

All jobs require certain competencies. This section of the report identifies those competencies that lead to superior performance in most jobs. The graphs below are in descending order from the highest rated competency required by the job to the lowest.

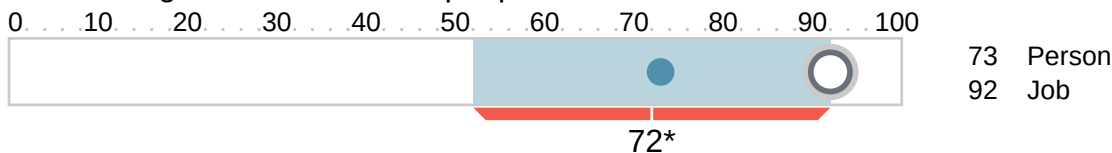
1. Customer Focus - Anticipating, meeting and/or exceeding customer needs, wants and expectations.



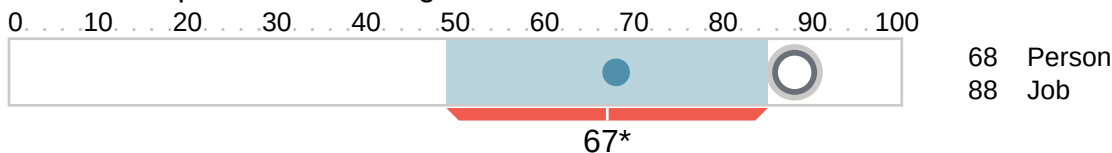
2. Teamwork - Cooperating with others to meet objectives.



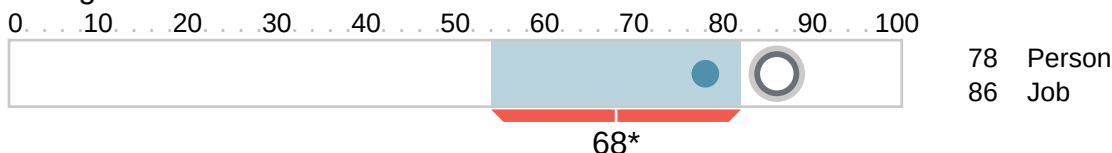
3. Interpersonal Skills - Effectively communicating, building rapport and relating well to all kinds of people.



4. Influencing Others - Personally affecting others actions, decisions, opinions or thinking.



5. Flexibility - Readily modifying, responding and adapting to change with minimal resistance.



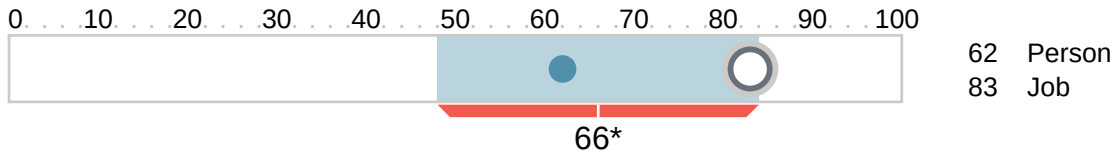
○ - Job ● - Person

* 68% of the population falls within the shaded area.

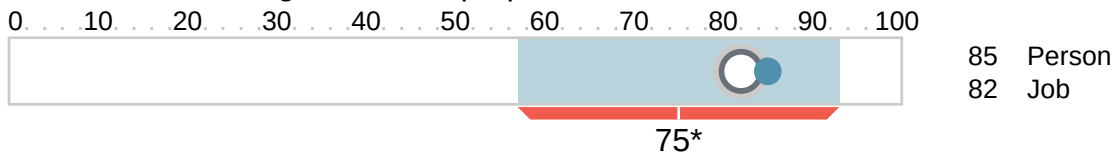


Job Competencies Hierarchy

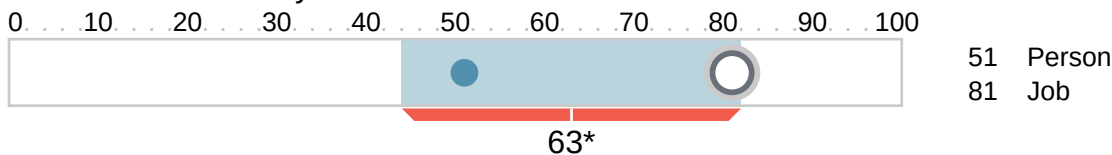
6. Creativity and Innovation - Creating new approaches, designs, processes, technologies and/or systems to achieve the desired result.



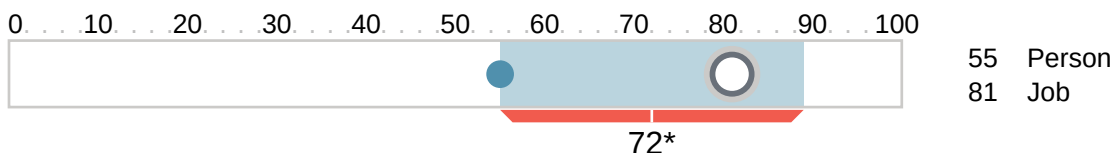
7. Leadership - Organizing and influencing people to believe in a vision while creating a sense of purpose and direction.



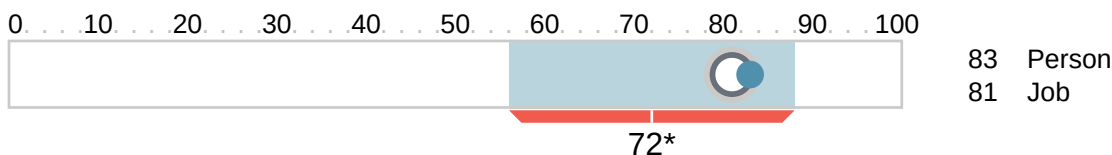
8. Conflict Management - Understanding, addressing and resolving conflict constructively.



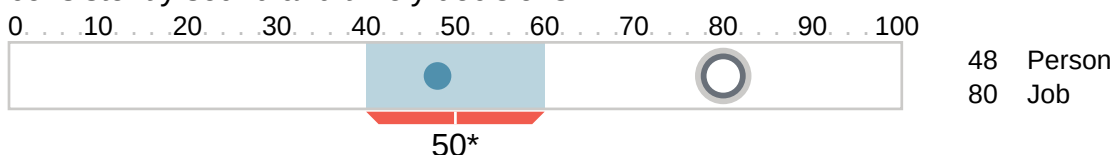
9. Diplomacy - Effectively and tactfully handling difficult or sensitive issues.



10. Understanding Others - Understanding the uniqueness and contributions of others.



11. Decision Making - Analyzing all aspects of a situation to make consistently sound and timely decisions.



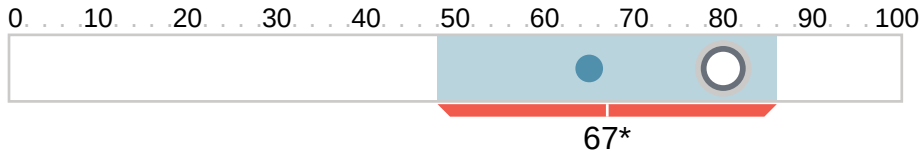
○ - Job ● - Person

* 68% of the population falls within the shaded area.



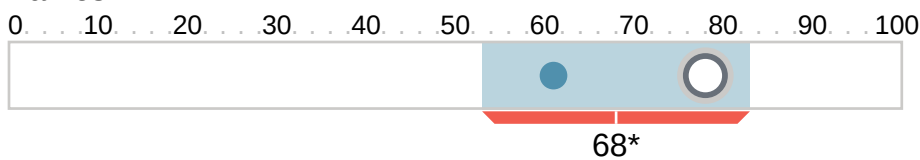
Job Competencies Hierarchy

12. Resiliency - Quickly recovering from adversity.



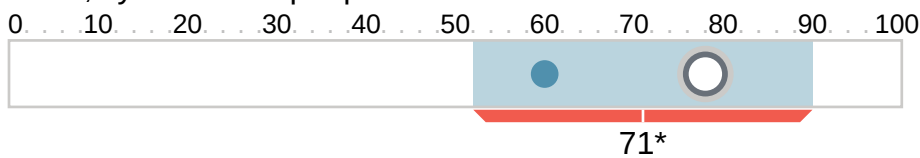
65 Person
80 Job

13. Time and Priority Management - Prioritizing and completing tasks in order to deliver desired outcomes within allotted time frames.



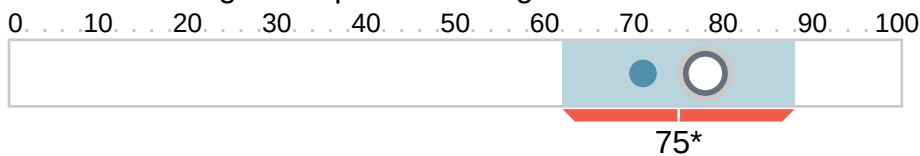
61 Person
78 Job

14. Project Management - Identifying and overseeing all resources, tasks, systems and people to obtain results.



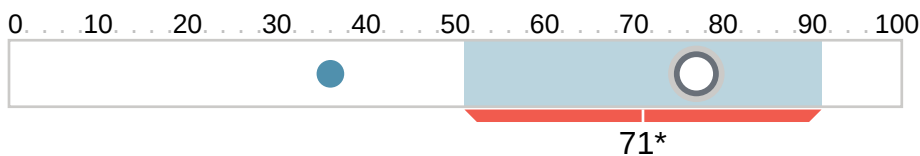
60 Person
78 Job

15. Employee Development/Coaching - Facilitating, supporting and contributing to the professional growth of others.



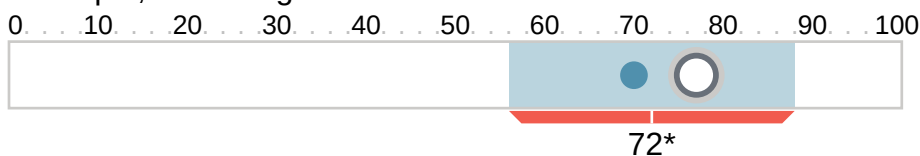
71 Person
78 Job

16. Personal Accountability - Being answerable for personal actions.



36 Person
77 Job

17. Continuous Learning - Taking initiative to regularly learn new concepts, technologies and/or methods.



70 Person
77 Job

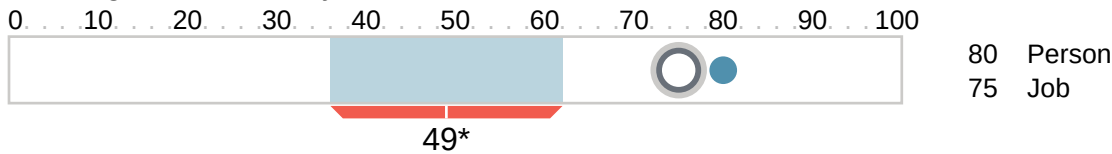
○ - Job ● - Person

* 68% of the population falls within the shaded area.

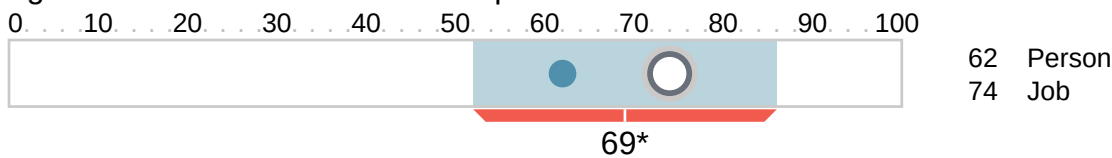


Job Competencies Hierarchy

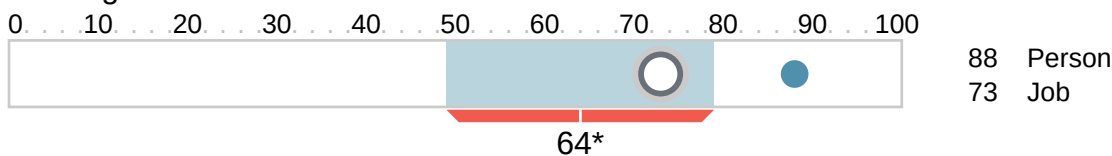
18. Futuristic Thinking - Imagining, envisioning, projecting and/or creating what has not yet been actualized.



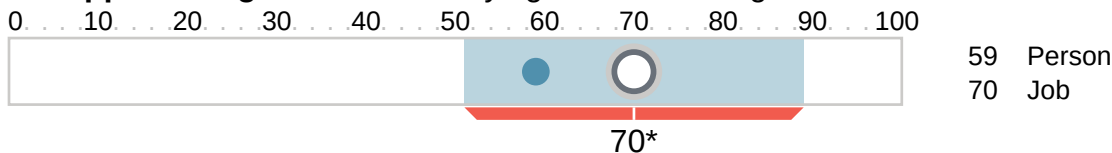
19. Negotiation - Listening to many points of view and facilitating agreements between two or more parties.



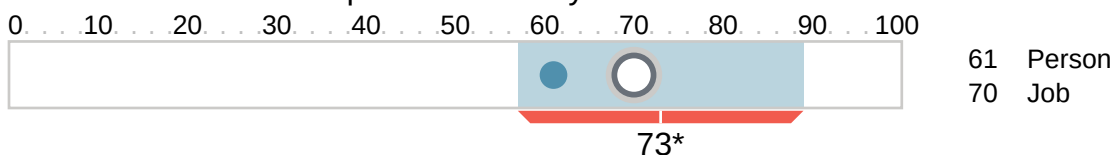
20. Self Starting - Demonstrating initiative and willingness to begin working.



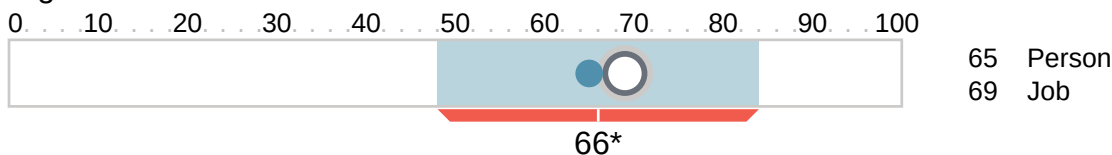
21. Appreciating Others - Identifying with and caring about others.



22. Planning and Organizing - Establishing courses of action to ensure that work is completed effectively.



23. Goal Orientation - Setting, pursuing and attaining goals, regardless of obstacles or circumstances.



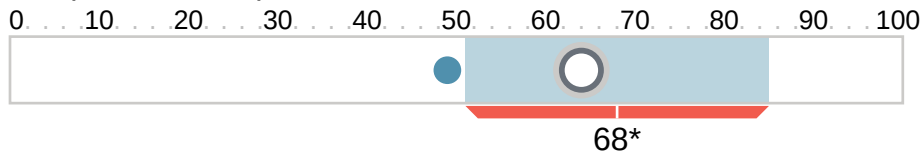
○ - Job ● - Person

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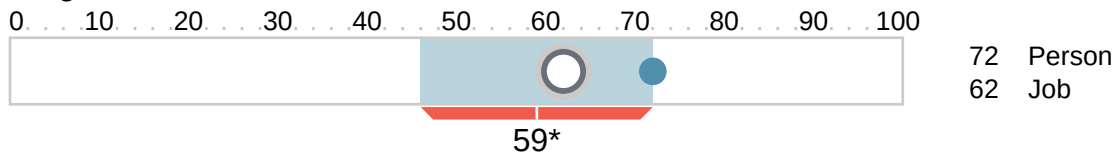


Job Competencies Hierarchy

24. Problem Solving - Defining, analyzing and diagnosing key components of a problem to formulate a solution.



25. Conceptual Thinking - Analyzing hypothetical situations, patterns and/or abstract concepts to formulate connections and new insights.



○ - Job ● - Person

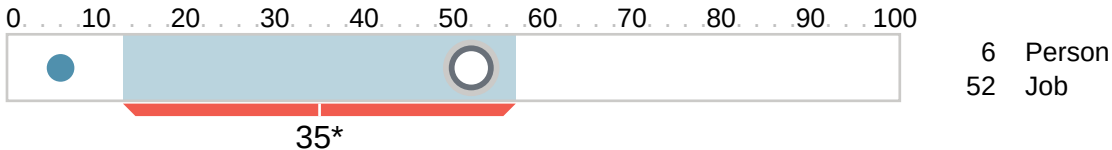
* 68% of the population falls within the shaded area.



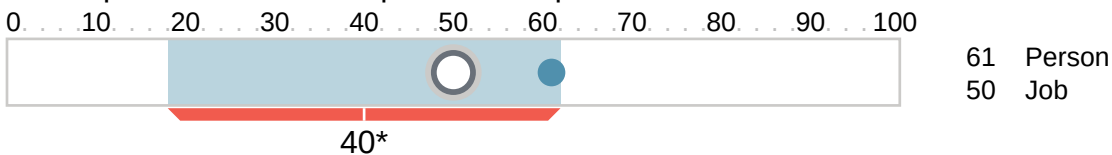
Primary Driving Forces Cluster

These graphs are based on the hierarchy of the job benchmark's driving forces in descending order from highest provided by the job to the lowest. Gaps may point to areas in the job that do not align with the persons driving forces.

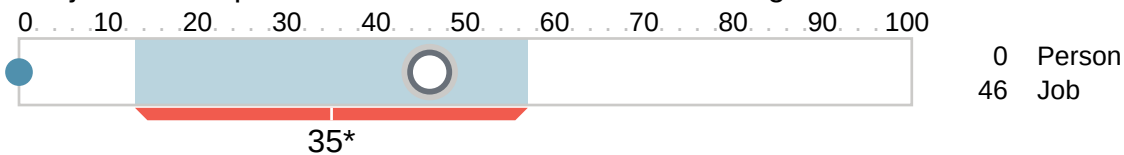
1. Collaborative - People who are driven by being in a supporting role and contributing with little need for individual recognition.



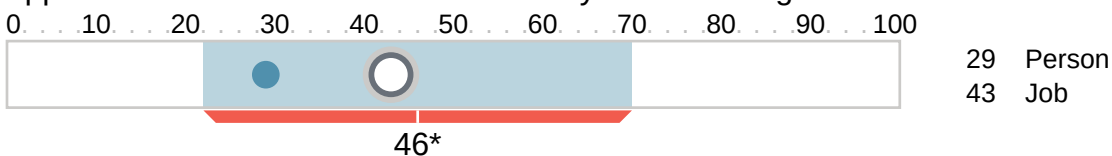
2. Selfless - People who are driven by completing tasks for the sake of completion, with little expectation of personal return.



3. Harmonious - People who are driven by the experience, subjective viewpoints and balance in their surroundings.



4. Receptive - People who are driven by new ideas, methods and opportunities that fall outside a defined system for living.



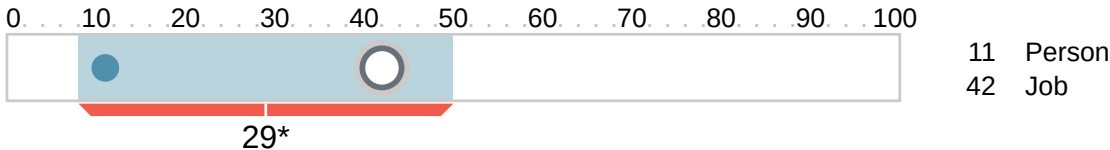
* 68% of the population falls within the shaded area.



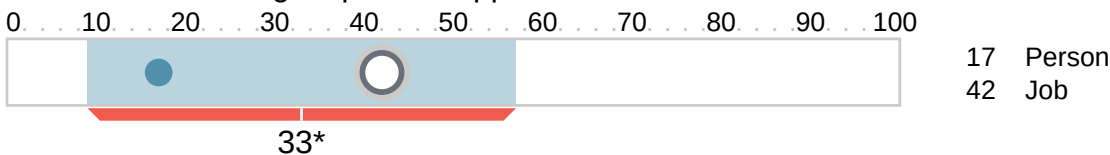
Situational Driving Forces Cluster

These graphs are based on the hierarchy of the job benchmark's driving forces in descending order from highest provided by the job to the lowest. Gaps may point to areas in the job that do not align with the persons driving forces.

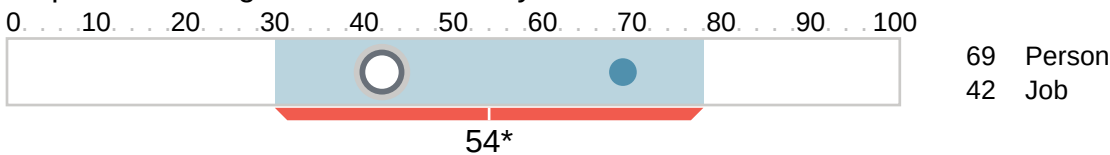
5. Instinctive - People who are driven by utilizing past experiences, intuition and seeking specific knowledge when necessary.



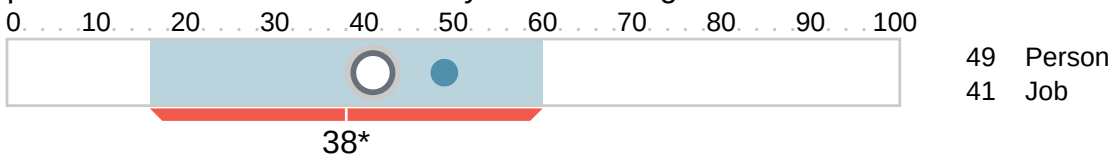
6. Altruistic - People who are driven to assist others for the satisfaction of being helpful or supportive.



7. Intellectual - People who are driven by opportunities to learn, acquire knowledge and the discovery of truth.



8. Structured - People who are driven by traditional approaches, proven methods and a defined system for living.



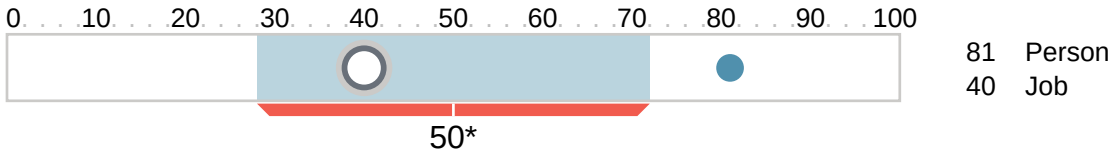
* 68% of the population falls within the shaded area.



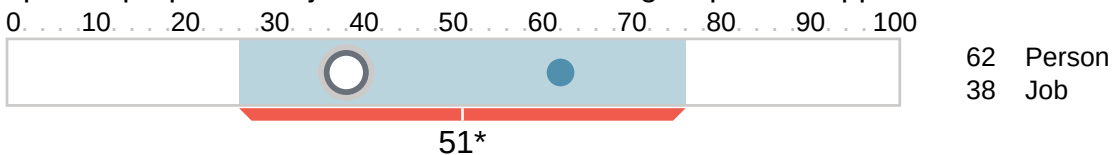
Indifferent Driving Forces Cluster

These graphs are based on the hierarchy of the job benchmark's driving forces in descending order from highest provided by the job to the lowest. Gaps may point to areas in the job that do not align with the persons driving forces.

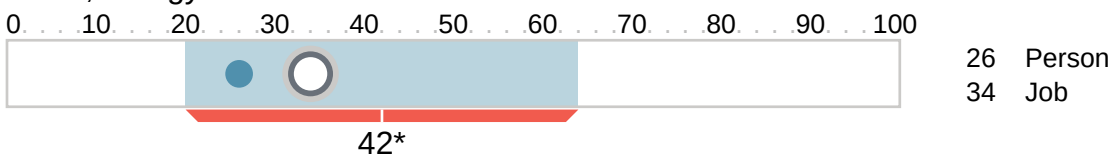
9. Objective - People who are driven by the functionality and objectivity of their surroundings.



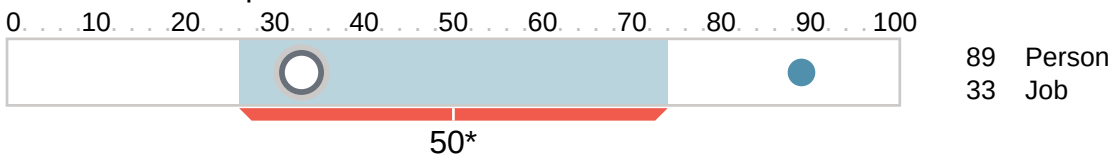
10. Intentional - People who are driven to assist others for a specific purpose, not just for the sake of being helpful or supportive.



11. Resourceful - People who are driven by practical results, maximizing both efficiency and returns for their investments of time, talent, energy and resources.



12. Commanding - People who are driven by status, recognition and control over personal freedom.

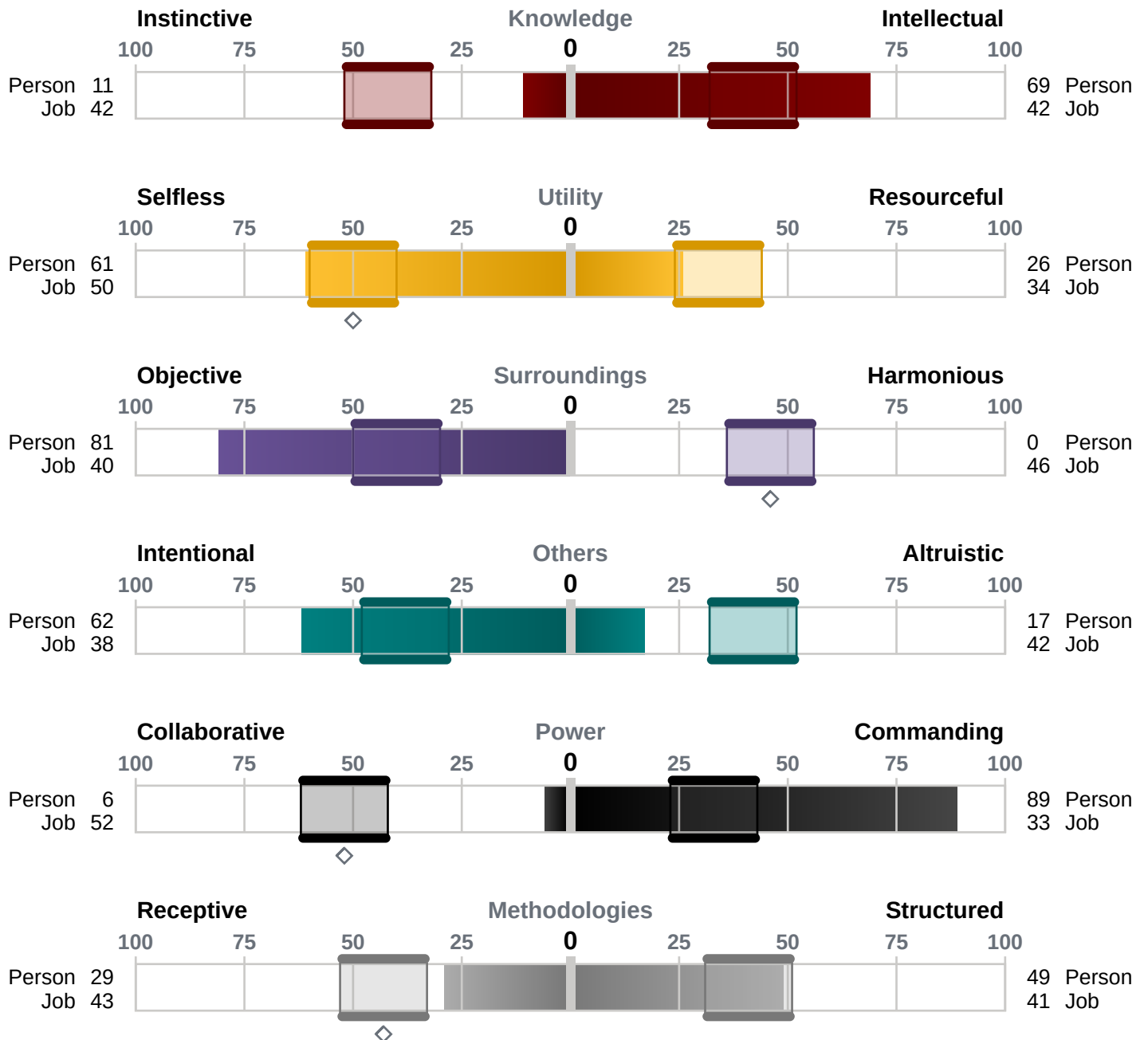


* 68% of the population falls within the shaded area.



Driving Forces Graph Candidate Name

The following graph is designed as a visual comparison between the position and the applicant for each of the 12 Driving Forces. The highlighted area denotes the position-related Driving Forces score. The applicant's score is denoted by the darker, solid line for each driver. The closer the applicant's score aligns to the position's score, the more engaged the applicant will be in the position.



Job Range (20 point range) - Denotes Primary Driving Force

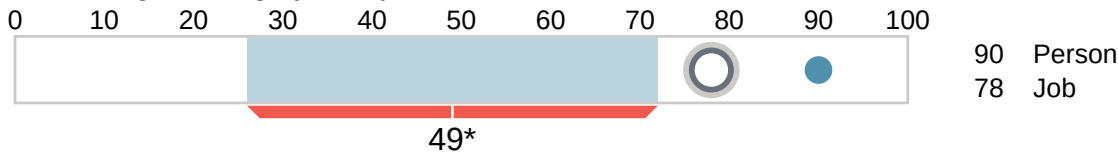
Candidate Name



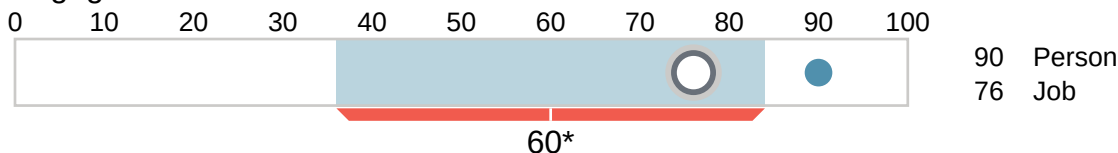
Behavioral Hierarchy

This section is designed to give a visual understanding of the behavioral traits demanded of the job and the natural behavioral style(s) of the individual(s). The graphs are in descending order from the highest rated behavioral traits required by the job to the lowest. In comparing the results in this section, it is important to note how gaps may indicate a level of stress that could be created when a person is forced to adapt behavior that is not his/her natural style.

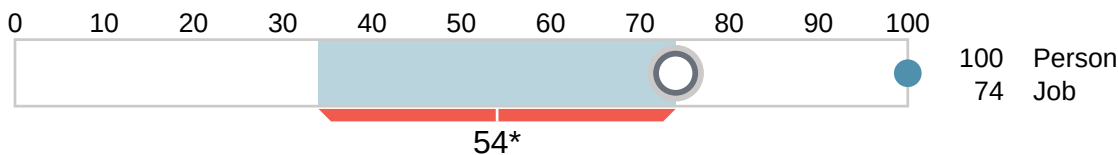
1. Competitive - The job requires assertiveness and a "will to win" in dealing with highly competitive situations.



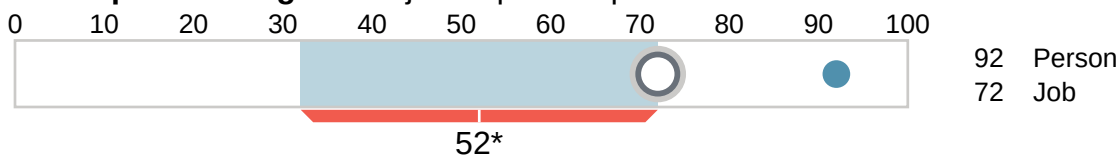
2. Interaction - The job requires frequent communication and engagement with others.



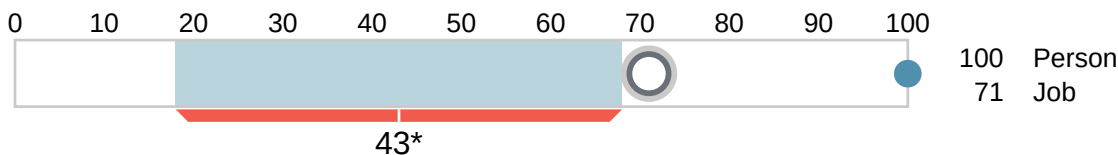
3. Versatile - The job requires adapting to various situations with ease.



4. Frequent Change - The job requires rapid shifts between tasks.



5. Urgency - The job requires decisiveness, quick response, and fast action.

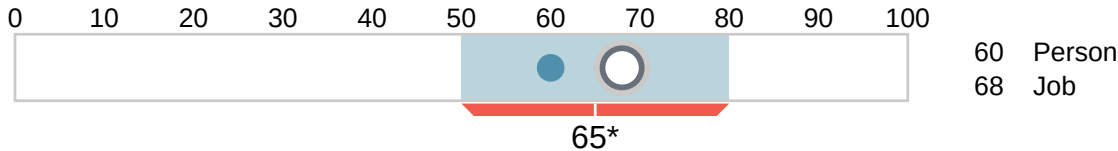


* 68% of the population falls within the shaded area.

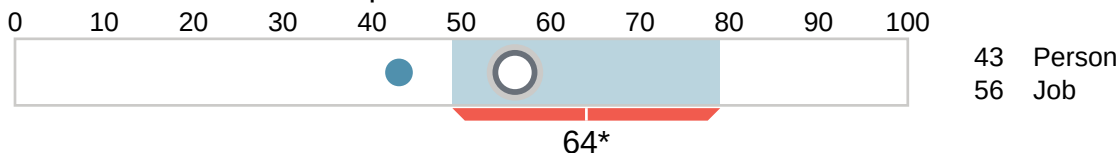


Behavioral Hierarchy

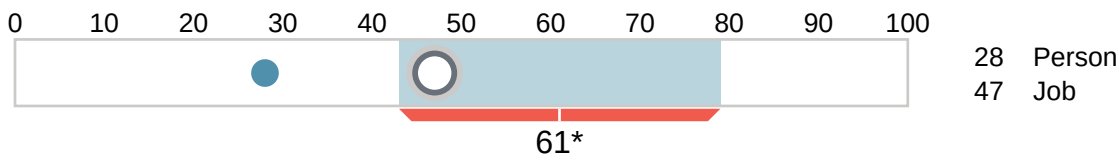
6. People-Oriented - The job requires building rapport with a wide range of individuals.



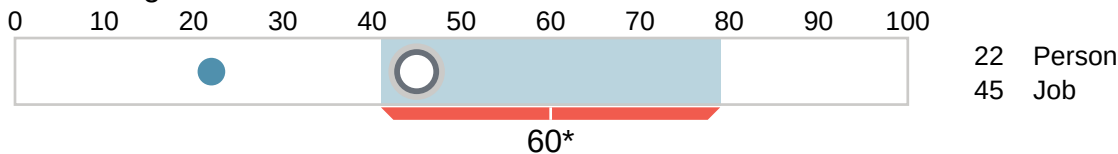
7. Customer-Oriented - The job requires identification and fulfillment of customer expectations.



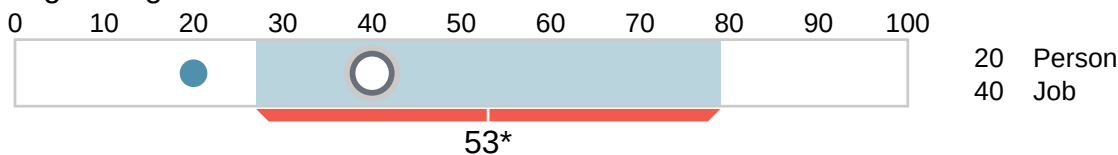
8. Persistence - The job requires finishing tasks despite challenges or resistance.



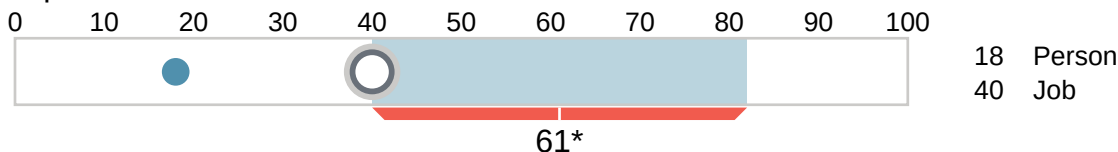
9. Following Policy - The job requires adhering to rules, regulations or existing methods.



10. Analysis - The job requires compiling, confirming, and organizing information.



11. Consistent - The job requires predictable performance in repetitive situations.



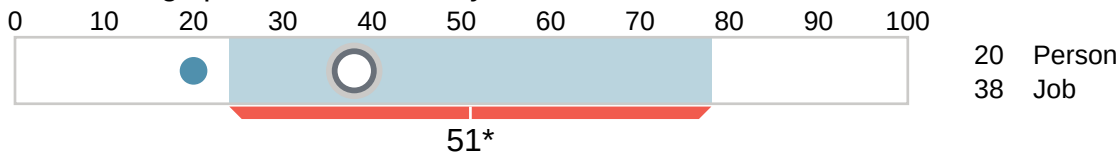
* 68% of the population falls within the shaded area.

○ - Job ● - Person



Behavioral Hierarchy

12. Organized Workplace - The job requires establishing and maintaining specific order in daily activities.

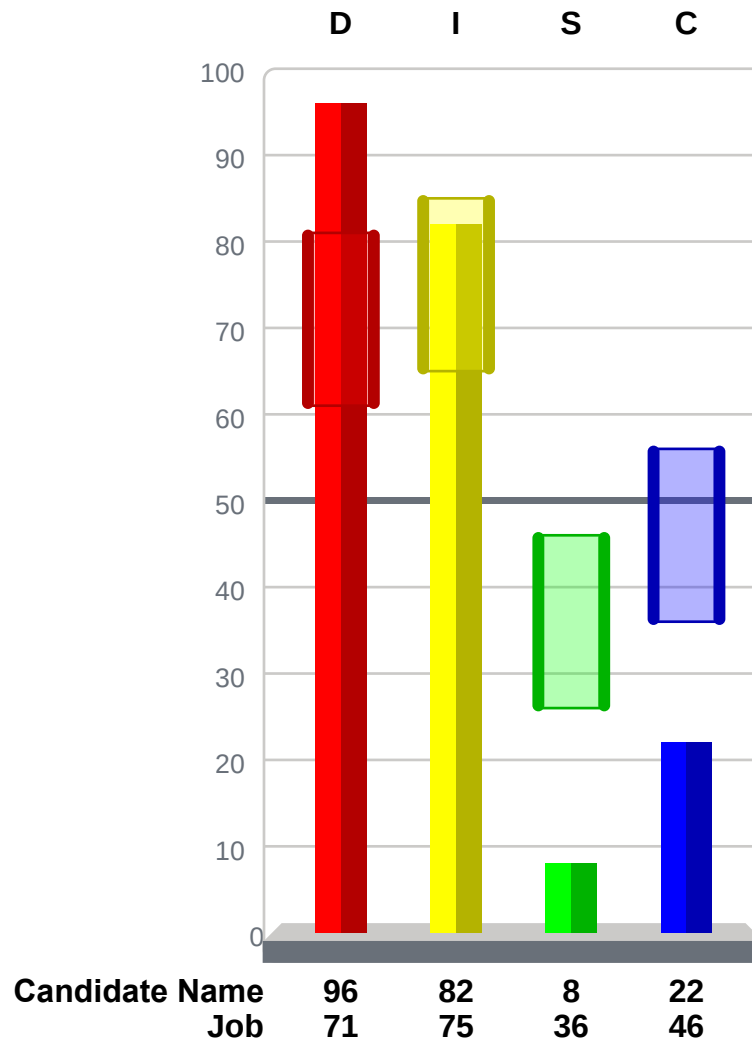


* 68% of the population falls within the shaded area.



Workplace Behaviors® Candidate Name

The following graph is designed as a visual comparison between the position and the applicant for each behavioral factor. The highlighted area denotes the position-related score for each behavioral factor. The applicant's score is denoted by the darker red, yellow, green and blue line. The closer the applicant's score aligns to the position's score, the better the applicant will perform in the position with respect to behavior.

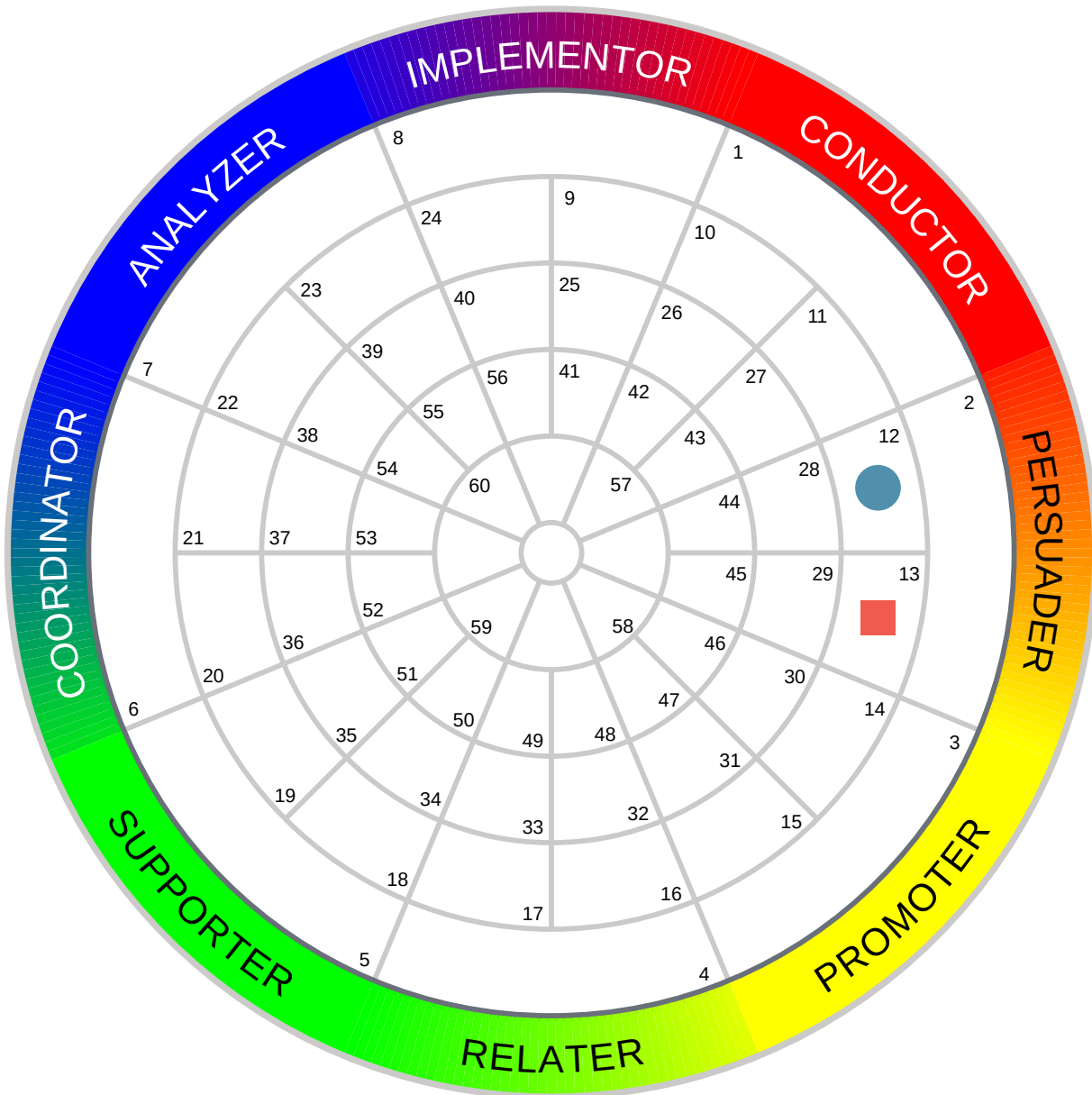


Job Range (20 point range)

Candidate Name



The Success Insights® Wheel



- Job - (13) PROMOTING PERSUADER
- Candidate - (12) CONDUCTING PERSUADER



Comparison Analysis For Consulting and Coaching

Job Competencies Hierarchy	Zone Range			Person
1. Customer Focus	91	—	100	50 
2. Teamwork	74	—	100	67 
3. Interpersonal Skills	72	—	92	73 
4. Influencing Others	86	—	100	68 
5. Flexibility	83	—	100	78 
6. Creativity and Innovation	66	—	84	62 
7. Leadership	75	—	93	85 

Primary Driving Forces Cluster	Zone Range			Person
1. Collaborative	35	—	57	6 
2. Selfless	40	—	62	61 
3. Harmonious	35	—	57	0 
4. Receptive	22	—	45	29 

Job Behavioral Hierarchy	Zone Range			Person
1. Competitive	73	—	100	90 
2. Interaction	60	—	84	90 
3. Versatile	54	—	74	100 
4. Frequent Change	52	—	72	92 

 Exact match

 Good compatibility

 Fair compatibility

 Poor compatibility

 Over-focused



**CITY
of
PORT ORANGE, FLORIDA**

Executive
Search & Recruitment Services
for

CITY MANAGER

THE MERCER GROUP, INC.

**Dona Higginbotham
Senior Vice President**

**3245 S. Atlantic Ave., Suite 607
Daytona Beach Shores, Florida 32118**

www.mercergroupincflorida.com

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Mercer Group Florida LLC

Consultants To Management

December 9, 2020

City of Port Orange
1000 City Center Circle
Port Orange, Florida 32129

The Mercer Group, Inc. understands the City of Port Orange may be looking to engage the services of an executive search firm to conduct executive search and recruitment services for a City Manager. Having conducted the search previously in 2015, with the Council selecting Mr. Johannsen, we are professionally well-qualified and would be honored to once again serve the City of Port Orange.

The Mercer Group, Inc. dba Mercer Group Florida is pleased to assist the City to recruit exceptionally well-qualified candidates for the position of City Manager. If selected to conduct the search and recruitment process for this position, we will have no difficulty beginning immediately to ensure a smooth process. It is our understanding that the scope of work, minimum responsibilities, and search and recruitment services shall include, but not be limited to, the following:

- Development of Candidate Profile and Recruitment.
- Production of Recruitment materials
- Strategy Outreach to best-fit candidates and Advertising Campaign.
- Candidate Screening.
- Candidate selection, background and offer.
- Appointment and follow-up.

The objectives that we will meet to find the best qualified candidates for the City Manager position are as follows:

- To conduct needs assessment for the new City Manager.
- To develop a comprehensive position profile.
- To encourage top level people to apply who would otherwise be reluctant to respond to an advertisement.
- To save a considerable amount of the City's time in establishing a position profile and reviewing applicants.
- To comply with appropriate personnel regulations and state laws (i.e., EEO, Affirmative Action and ADA).
- To assess the qualifications and suitability of candidates independently and objectively for the position.

- To respond to all candidate inquiries and produce all correspondence during the search.
- To mail an information packet supplied by the City to all qualified applicants.
- To recommend a pool of finalist candidates.
- To assist staff with coordinating finalist candidate interviews.
- To preserve the confidentiality of inquiries to the degree possible under Florida law.
- To assist the City in reaching a final decision.
- To assist in negotiating a compensation package with the successful candidate.
- To keep the liaison closely involved in key decisions and informed of our progress.

The purpose for engaging the services of an executive search firm is to seek out and recruit experienced candidates and to assist the City in selecting highly qualified individuals who meet the profile and needs of the City and who might not otherwise apply. The Mercer Group, Inc. is well-qualified to assist with this project. Most recently we have successfully completed and/or currently engaged in searches for the Cities of Largo, Deltona, Port Orange, DeBary, St. Petersburg, Temple Terrace, St. Pete Beach, Cocoa, Gainesville, Dunedin, Deerfield Beach, Hallandale Beach, Hollywood, Key Biscayne, Mary Esther, Orange Park, Palatka, Palm Beach, Palmetto Bay, Plant City, Pompano Beach, St. Cloud as well as Hernando County, Hillsborough County, Citrus County, Polk County, Pinellas Suncoast Transit Authority and TBARTA. These are just the **Florida** recruitments; there are many more in the Southeast and nation-wide.

The Mercer Group, Inc. has been in operation for over thirty years with corporate headquarters in Atlanta and branch offices in thirteen (13) states, including **Volusia County Florida**. The Mercer Group, Inc. has the resources available to conduct this search and avoid untimely delays in the process. A list of City and County Administrator searches is attached for your reference. Mercer Group Florida LLC, a minority owned LLC, has been in operation since June 2010.

If selected, I will personally lead this recruitment from our Daytona Beach Shores office; with over 20 years of recruiting experience, I am uniquely qualified to lead this search for The City of Port Orange's City Manager.

The Mercer Group Florida fees for the Executive Search/Recruitment Services are:
\$17,750.00 plus expenses not to exceed \$2,250.00.

Thank you for the opportunity to assist the City with this important assignment. Please contact me directly at 954-559-8865 if you have any questions.

Sincerely yours,
Dona Higginbotham

THE MERCER GROUP FLORIDA

An Executive Summary of what The Mercer Group offers Port Orange, Florida

Qualifications and Staffing

The Mercer Group, Inc. has been in operation for twenty-eight years with offices in thirteen (13) States, including **Volusia County, Florida**.

Mercer Group Florida, a minority owned company, has been in operation since June 2010.

Dona Higginbotham will be the assisting the City of Port Orange for the City Manager Search and Recruitment Services and will serve the City from our Daytona Beach Shores location. More information about current and previous searches is available at:
<http://mercergroupincflorida.com/about-us>

Understanding the Project & Our Approach

Services provided include, but are not limited to position analysis and preparation of a position profile, recruitment for the position, inviting potential candidates to apply, reviewing and screening applications, conducting interviews, reference checks and background checks of selected candidates, recommending a list of final candidates, coordinating final interviews, contract negotiating as required, and following up.

Our 7-Step Search Process

We recommend a seven (7)-step search process as follows:

1. **Position Analysis** - Define work relationships, job qualifications and requirements for the position - the "Position Profile".
2. **Recruitment Process** - Recruit State-wide, regionally, and nationally for the position and network to locate qualified candidates.
3. **Resume Review** - Identify qualified candidates.
4. **Candidate Screening** - Thoroughly screen prospective candidates.
5. **Background Investigation** - Thoroughly evaluate prospective candidates.
6. **Interview Process** - Make recommendations and assist in selection.
7. **Negotiation and Follow-up** - Facilitate employment and follow-up to ensure complete integrity of the process.

The **Candidate Screening** will be handled personally and thoroughly by Ms. Higginbotham of the Mercer Group Florida.

Schedule

While the schedule and timeline will be determined by the City of Port Orange following our consultations, the schedule we recommend provides for the successful candidate to be selected within 12 weeks from start to finish or an alternate schedule to be determined by the Council.

PROJECTED TIMELINE	DELIVERABLE
One week following execution of agreement	Kickoff Meeting with designated individual(s)
Week One	Interviews/Consultation (as desired) to: *Develop Characteristics & Attributes of a Successful Candidate. *Develop Compensation Package and Job Description
Week Three	Approve Recruitment Materials
Week Three - Search Officially Opens	Recruitment of Qualified Individuals Ads Placed
Weeks Three through Seven	Send Recruitment Materials Invitation Letter
Weeks Three through Seven	Outreach Telephone Calls/Email
As received	Acknowledge Receipt of Application Materials
Week Seven	Closing Date for Receipt of Applications
Ongoing through Week Seven	Screen Applications Against Selection Criteria Consultant Interviews of Top Candidates
Week Eight	Meet with the designated liaison to Review Top Candidates and assist in the selection of Finalists.
Weeks Nine & Ten	Conduct Reference and Background Checks (conditional offer may be made to candidate)
Week Ten	Send Interview Guide of Selected Finalists
Week Eleven/Twelve	Conduct Interviews of Selected Finalists
Week Eleven/Twelve	Selection of Candidate
Week Eleven/Twelve	Negotiate Agreement
At close of search process	Notify Candidates Not Selected

Reasonable Fees

The Mercer Group. proposes a **fee of \$17,750.00, plus expenses not to exceed \$2,250.00, for the Executive Search/Recruitment Services** for the City of Port Orange.

SEARCH / RECRUITMENT SERVICES	FEE
Position Analysis	2,750
Outreach Campaign	2,750
Resume Review	2,875
Candidate Screening	2,875
Background Investigation	3,250
Interview Process	2,750
Negotiation and Follow-up	500
TOTAL FEE	\$17,750

The **only** additional cost to the City, will be the costs related to bringing candidates to the City of Port Orange for in-person interviews. Transportation, hotel, meals, etc.

Guarantees

We make ten (10) guarantees of our search and recruitment work for City of Port Orange.

1. **Client Organization:** The client is defined as the entire entity, including all departments, divisions, sections and groups. This assures that all our guarantees apply to the entire client organization.
2. **Two-Year Off Limits:** We will not recruit candidates from a client organization for two years after completion of a search assignment without the full agreement of the client.
3. **Placement Off Limits Forever:** We will never recruit a candidate whom we have placed in a client organization as long as he/she is employed by that organization without the full agreement of the client.
4. **Continue the Search:** If, for any reason, the client does not feel comfortable selecting a candidate from our original recommended group of candidates, we will continue the search until the client can make a selection.
5. **Replacement of Successful Candidate:** If the candidate we place with the client leaves the client organization for any reason during the 12-month period following the date of placement with the client, we will replace the candidate for out-of-pocket expenses only and **there will be no professional fees** charged by The Mercer Group Florida to make the new placement.

6. **Parallel Candidate Presentation:** We will not present a candidate simultaneously to more than one client. This permits our firm to represent one client organization without any conflicts of interest.
7. **Client Conflicts:** If asked, we will disclose to our clients the names of the organizations which are "Off Limits" that logically would be target organizations on the new search assignment.
8. **Deceptive/Misleading Search Techniques:** We commit to our clients and to our prospective candidates that we will not use any search techniques which may be considered as deceptive or misleading.
9. **Resume Floating:** We will not float resumes to organizations in the hopes that we can collect a fee if that individual is hired.
10. **Not Represent Individuals:** We assure our clients and individuals who may become candidates that we will not collect a fee from candidates whom we may recommend for a position.

We look forward to being of service to the City of Port Orange once again.

THE MERCER GROUP, INC.

Dona Higginbotham
Senior Vice President
3245 S. Atlantic Ave., Suite 607
Daytona Beach Shores, Florida 32118
Cell: 954-559-8865
www.mercergroupincflorida.com

PREVIOUS CITY MANAGER RECRUITMENTS

Mercer Group Inc. City and County Administrator Searches 2015 - 2020

City Managers/Administrators

Aberdeen, Washington – City Administrator - 2018
Avondale Estates, Georgia – City Manager - 2018
Beacon, New York - City Administrator – 2015
Berwyn Heights, Maryland – Town Manager - 2018
Billings, Montana – City Administrator – 2018
Brunswick, Georgia—City Manager - 2020
Biscayne Village, Florida – Village Manager - 2018
Bowie, Maryland – City Manager - 2016
Cartersville, Georgia – City Manager – 2018
Charlotte, North Carolina – City Manager - 2008
Cheverly, Maryland – Town Administrator - 2019
City of South Fulton, Georgia – City Manager - 2018
Clarkston, Georgia – City Manager - 2018
Cleveland, Tennessee – City Manager - 2016
Clinton, North Carolina – City Manager - 2018
Cocoa, Florida – City Manager - 2020
College Park, Maryland - City Manager - 2015
Coventry, Rhode Island - Town Manager - 2015
Creedmoor, North Carolina - City Manager - 2015
DeBary, Florida – City Manager – 2019
Delray Beach, Florida – City Manager - 2018
Delta, Colorado – City Manager - 2015
Deltona, Florida - City Manager - 2015
Dover, Delaware – City Manager – 2020
Dunedin, Florida – City Manager - 2016
Emerald Isle, North Carolina – Town Manager - 2019
Fairburn, Georgia – City Administrator - 2018
Forest Lake, Minnesota – City Administrator - 2018
Franklin, New Hampshire – City Manager - 2018
Goldsboro, North Carolina – City Manager - 2019
Great Falls, Montana – Deputy City Manager - 2016
Hallandale Beach, Florida – City Manager - 2019
Hampton, Virginia – Assistant City Manager - 2018
Hartford, Vermont – Town Manager - 2015
Hastings, Minnesota – City Administrator – 2019
Indian River Shores, Florida – Town Manager - 2018
Indian Trail, North Carolina – Town Manager - 2020
Isle of Palms, South Carolina – City Administrator - 2019
Largo, Florida – City Manager – 2016
Las Cruces, New Mexico – City Manager - 2015
Lebanon, New Hampshire - City Manager - 2015
Mankato, Minnesota – City Manager - 2020
Manteo, North Carolina – Town Manager - 2018
Marco Island, Florida – City Manager - 2017
New Carrollton, Maryland – City Administrative Officer - 2016
New Shoreham, Rhode Island – Town Manager - 2016
Norcross, Georgia – City Manager - 2020
Oxford, North Carolina, City Manager – 2017
Palatka, Florida—City Manager –2019
Pocomoke City, Maryland - City Manager - 2015
Polson, Montana—City Manager-2020
Poolesville, Maryland – Town Manager - 2019
Port Orange, Florida - City Manager - 2015
Portsmouth, Virginia - City Manager – 2015
Portsmouth, Virginia – Deputy City Manager - 2015
Poughkeepsie, New York – City Administrator – 2016
Rosenberg, Texas – City Manager – 2015

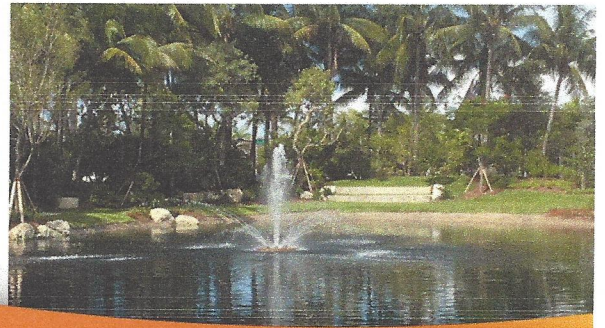
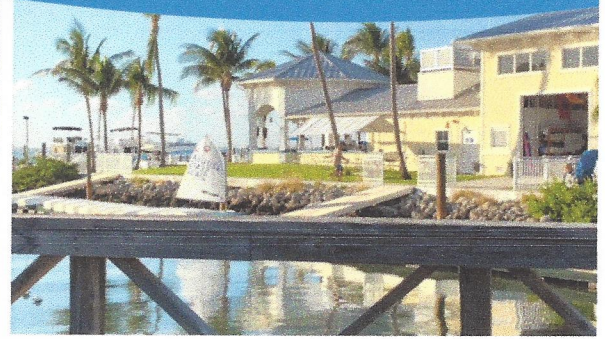
Roosevelt City, Utah – City Manager - 2020
Roswell, Georgia – City Administrator - 2018
Scottsdale, Arizona – City Manager - 2016
Seabrook Island, South Carolina – Town Administrator – 2017
Sidney, Nebraska—City Manager –2020
South Kingstown, Rhode Island – Town Manager – 2018
Southern Shores, North Carolina – Town Manager - 2020
South St. Paul, Minnesota – City Administrator - 2018
St. Cloud, Florida – City Manager - 2015
Takoma Park, Maryland - City Manager - 2015
Temple Terrace, Florida – City Manager - 2016
Town of Berwyn Heights, Maryland – Town Manager - 2020
Village of Palmetto Bay, Florida – Village Manager - 2020
Westminster, Maryland – City Administrator – 2016
West St. Paul, Minnesota – City Manager - 2017

County Managers/Administrators

Archuleta County, Colorado - County Administrator - 2013
Brevard County, Viera, Florida – County Manager - 2017
Citrus County, Florida - County Administrator - 2014
Forsyth County, Georgia – County Manager - 2017
Gaston County, North Carolina – Assistant County Manager – 2019
Liberty County, Georgia – Asst. County Administrator – 2019
Los Angeles County, California – Assistant Chief Executive Officer & Legislative Affairs - 2018
Pickens County, South Carolina – County Administrator - 2016
Powhatan County, Virginia – County Administrator –2017

PREVIOUS RECRUITMENT BROCHURES

The Village of
KEY BISCAINE, FLORIDA

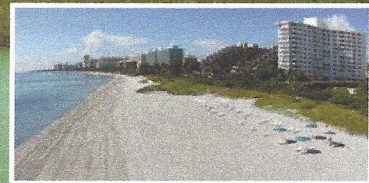
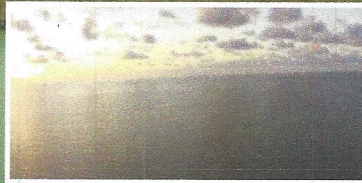
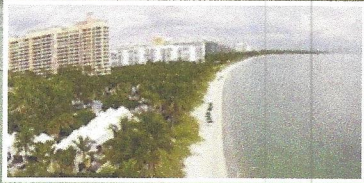
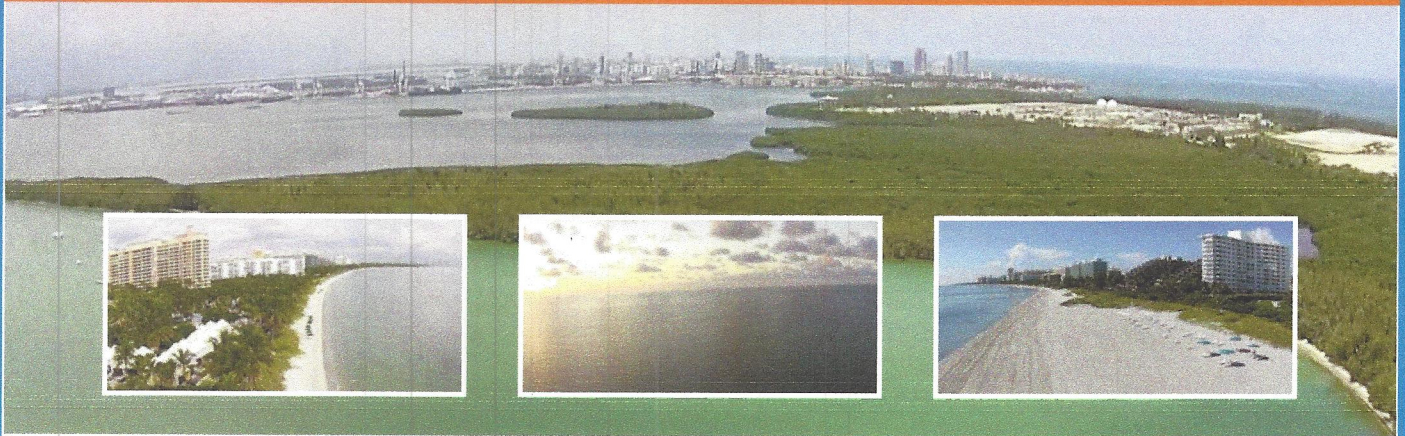


invites your interest in the position of

VILLAGE MANAGER



KEY BISCAIYNE — AN OUTSTANDING OPPORTUNITY



COMMUNITY

Home to nearly 13,000 residents, a number of civic institutions and schools, and an active business community, the island Village of Key Biscayne has a total area of 1.4 square miles. Lying south of Miami Beach and just offshore of the City of Miami, the Village is sandwiched between Crandon Park, an 850 acre County park to the north, and the 500 acre Bills Baggs Cape Florida state park to the south. The Village is connected to Miami via the Rickenbacker Causeway, originally built in 1947. While there had been earlier attempts to develop a town on Key Biscayne, it wasn't until the opening of the four-mile long Rickenbacker Causeway from Miami to Virginia Key and on to Key Biscayne in 1947 that the island was opened up to large scale residential development. The northern two-thirds of the island had been operated as the largest coconut plantation in the continental United States during the first half of the 20th century.

The Village of Key Biscayne was incorporated as a new municipality in 1991 - the first new city in Miami-Dade County in over fifty years.

Key Biscayne features distinctive allures and a great quality of life on a lush sub-tropical island close, but not too close, to the urbanized mainland. Buffered by parks and open water from downtown Miami, the congestion and clamor of the big city seem remote from Key Biscayne. With its own signature Island-vibe, Key Biscayne has a small-town home-town ambiance, with a neighborly feel. The public spaces and neighborhoods are active, animated by pedestrians and joggers, dog-walkers, bike riders, and kids making their way to school. Friends encounter friends at the well-used public spaces and shops.

A tropical climate prevails throughout the year, characterized by hot, humid summers and mild dry winters. Due to its island geography and favorable winds, Key Biscayne is subject to cooler highs than Miami year-round. Hurricanes threaten the island occasionally. Though landfalls are rare, hurricane precautions are not. Precipitation is lower than that of Miami, as the Atlantic Ocean inhibits summer thunderstorm convection.

Residents and visitors flock to the white sandy beaches within the Village and in the State and County parks. Intrepid Islanders make their way to a nearby coastal barrier reef and the only federally recognized underwater archaeological trail in the United States. Recreational activities abound, including bicycling, tennis, golf, jogging, fishing, boating and sailing. The Village is ranked in the top 20 beach town housing market in the U.S. which is based on four criteria: average temperature, percent of sunny days, percent of days with good air quality, and crime rates. Some of the world's best fishing and alluring snorkeling and scuba diving is done right off shore on amazing artificial reefs made ingeniously from everything from recycled tug boats to airplanes! Amazing! Enjoy a fitness class, watch a local recreational league soccer game, or spend some quiet time with a good book under the shade of a palm tree on the Village Green.

The population is affluent, highly educated, international and well-traveled, and significantly engaged in the community. Service standards and expectations are high. The population is predominately Caucasian, roughly split between Anglos and Hispanics. Approximately half the residents are foreign born. Approximately 30% of the population is under 20 years old. Not quite 20% of the population is over 65. The Village is served by one public K-8 school within the community and a magnet middle school and high school on nearby Virginia Key. There are also four parochial schools in the Village. The community is essentially built-out, with approximately 1,250 single family or duplex homes and roughly 6,200 condominium units. Renovations and rebuilding is something of a constant. Although residential density has actually decreased slightly - a consequence of land development policies - the full-time population has increased, as permanent residents replace snow-birds.

Overall, Island Paradise is an apt description for the Village of Key Biscayne.

Learn more by visiting the official site of the Village of Key Biscayne, Florida

www.keybiscayne.fl.gov

THE ORGANIZATION

When the Village of Key Biscayne was incorporated in 1991, following a referendum that essentially rejected County land development policies and widely perceived deficiencies in service, incorporation provided local control over taxes and future development. The Village operates under a Council-Manager form of government, with a "strong" manager system. The Village Council consists of a separately elected Mayor and six Councilmembers. They appoint the Village Manager, the Village Clerk and the Village Attorney. The Manager oversees a full-service Village government, featuring fire-rescue, police, building, planning and zoning, human resources, finance and public works departments. There are approximately 125 full-time employees, and five collective bargaining units.

The local millage tax rate is one of the lowest of any municipality in Miami-Dade County. The fiscal year 2017-18 General Fund Operating Budget totals \$32,366,000, supplemented with Capital Improvement Plan funds of \$1,639,000 to produce a total current-year financial program of \$34,005,000. General Fund Revenues total approximately \$34,279,000.

Water and sewer service is provided by the County. The Village contracts for engineering, landscaping, solid waste and recycling services.

THE VILLAGE MANAGER POSITION

The Village of Key Biscayne is an exciting opportunity for an innovative, take-charge, forward thinking, enthusiastic, energetic, and experienced leader with excellent communication skills who is proactive, passionate and committed to engaging internal and external stakeholders, who demonstrates proven knowledge and experience in local government and a management style that is adaptive to diverse audiences; although not required, bilingual including Spanish would be an asset.

The Village Manager serves as the operational head of the Village government directing all functions of the Village and activities of all Village departments. The new Village Manager must not only be visible and actively involved in the community but must have a good understanding of Village history and local "values", as well as a strong and sincere commitment to community engagement and support of local institutions, accompanied by consensus building and visionary leadership skills.

ABOUT THE CANDIDATE

The Village Council is looking for the ideal Manager candidate who is intelligent, energetic, confident and effective; with excellent interpersonal skills; a person of honesty and integrity who, importantly, manifests "wisdom". He/She will be professional, progressive, and an excellent communicator; a leader who can inspire and reinforce in all ways confidence in "good government"; who understands how to manage efficient process while keeping all Council Members well-informed with unfiltered information, readily sharing information and promoting transparency. The new Manager will be comfortable telling the Council Members what they need to hear and not just what they want to hear. The new Manager should lead by excellent example

and seek to bring people together to foster a coordinated team and, where possible, consensus. He/She will not have "baggage" or be fettered or perceived to be fettered by factional considerations. He/She will instill confidence in the Village Council and the community and inspire staff to achieve mutually developed goals and objectives and hold staff accountable for results.

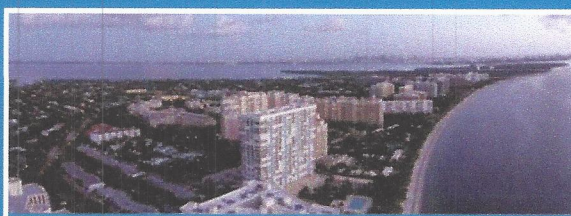
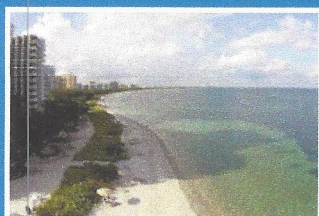
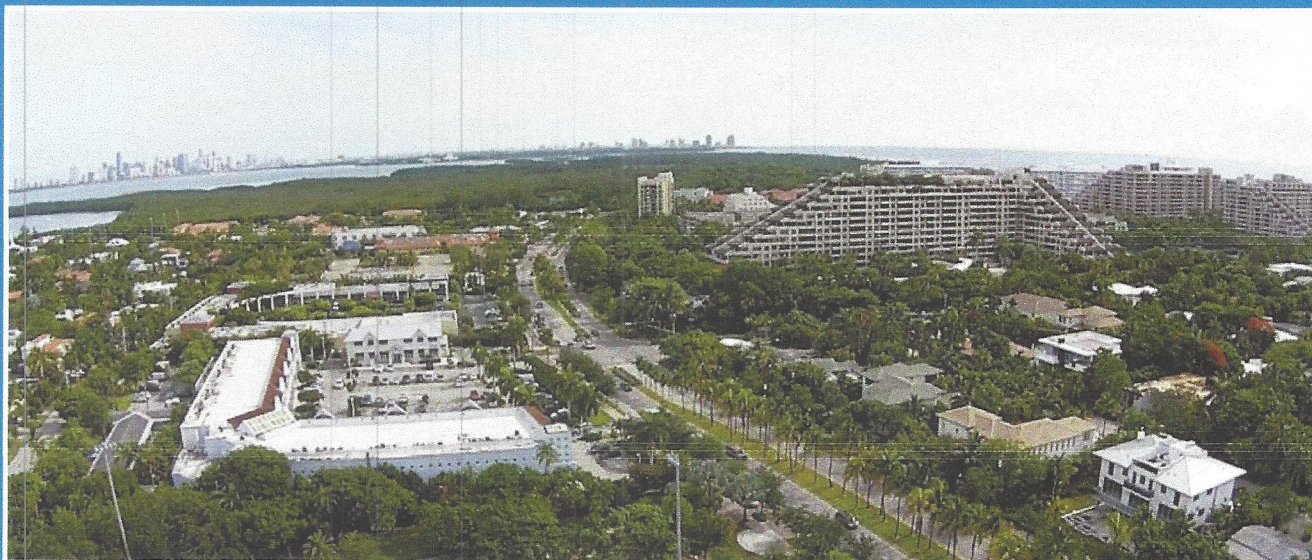
The Village Manager will represent the Village at events and proceedings within and outside the island and will be comfortable representing and advocating for the Village with other governmental players at all levels. The Village Manager will work from past achievements in community-building, having absorbed lessons from the past work that will preserve enduring qualities and lead the Village forward as changes occur.

The Village Manager should possess a Bachelor's degree in Public Administration or a related field with a Master's degree preferred and at least five to seven years of municipal management experience as a Village/City Manager or Assistant Manager (or equivalent executive position) in a community/organization comparable or larger in size as Key Biscayne; private sector experience is a plus. Coastal community experience is a definite plus. The Village Council expects the successful candidate to be a member in good standing (or eligible for membership) of the International City/County Management Association (ICMA). Evidence of continued professional development is also important.

The Village Council is looking for someone who will maintain an open-door policy, will be patient taking inputs but decisive as well as diplomatic; a leader whose organizational ability will permit effective pursuits of out-of-office community engagement priorities; a good listener, outgoing, with a good sense of humor and willingness to get to know constituents and help generally with their civic pursuits; a creative and confident thinker who can chart a path and guide others on it. He or she will have sincere commitment to diversity and to serve as a mentor to Village staff, helping them to advance in their careers and to create stability in the administration.

In sum, the new Village Manager will have the following Knowledge, Skills, and Abilities:

- Well-versed with a working knowledge of Finance and Budgeting.
- Politically astute with the ability to engage without being compromised politically.
- Ability to develop and implement short and long term capital improvement plans, projects and budgets, including funding sources for capital projects.
- Hands-on and practical knowledge of municipal public safety services including Fire Rescue and Police.
- Experience working with organized labor and union negotiations.
- Knowledge and understanding of Federal Emergency Management Agency (FEMA) disaster preparedness and disaster recovery policies and procedures.
- A demonstrated ability to successfully work with other legislative bodies, elected and appointed officials; County, State and Federal.
- Knowledge and understanding of beach management, re-nourishment, protection, and funding sources.



RESIDENCY

While not required, the Village Council would prefer the new Manager establish residency within the Village limits of Key Biscayne.

COMPENSATION AND BENEFITS

The annual salary of the current Village Manager is \$200,000.00. The Members of the Village Council are committed to a starting salary that will be market competitive, depending on the experience and qualifications of the selected individual. In addition, the Village Council expects to provide an excellent fringe benefit package to the successful candidate. Reasonable relocation expenses will also be negotiable with the successful candidate.



The Mercer Group, Inc.
Consultants To Management

HOW TO APPLY

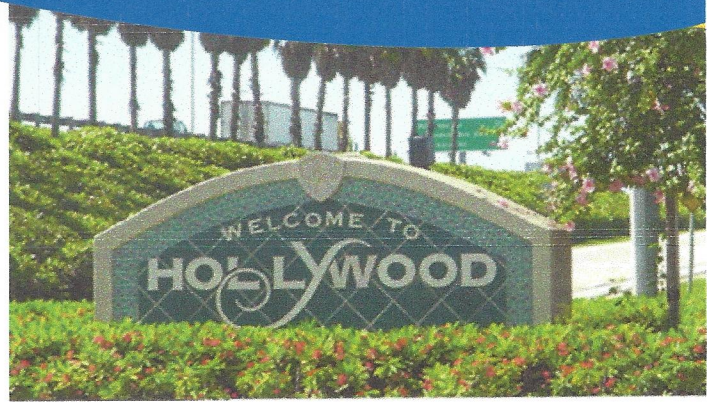
For additional information on this outstanding opportunity, please contact W. D. Higginbotham, Jr., Senior Vice President, at 727-214-8673, WDHiggin@mercergroupinc.com or visit www.mercergroupincflorida.com/executive-recruiting

Interested and qualified candidates should send a letter of interest and resume electronically by 5:00 PM Eastern Time on March 16, 2018, to:

W. D. Higginbotham, Jr.
Senior Vice President
The Mercer Group, Inc.
Email - WDHiggin@mercergroupinc.com

Resumes are subject to the provisions of Florida Public Records Statutes. Key Biscayne, Florida, is an Equal Opportunity Employer. Key Biscayne does not discriminate on the basis of race, color, religion, creed, sex, age, marital status, national origin, political ideas, or disability in employment or in the provision of services.

THE CITY OF **HOLLYWOOD, FLORIDA**



INVITES YOUR INTEREST IN THE POSITION OF
DIRECTOR OF FINANCIAL SERVICES



HOLLYWOOD, FLORIDA — AN OUTSTANDING OPPORTUNITY



THE COMMUNITY

Rich in history and poised for the future, the City of Hollywood is located within minutes of the second busiest cruise port in the world and adjacent to Fort Lauderdale Hollywood International Airport. It is strategically located between Fort Lauderdale and Miami insuring convenience and access while offering a corporate and residential lifestyle all its own. The City is home to approximately residents, has a total area of 31 square miles and is the twelfth largest city in Florida.

Joseph W. Young founded the city in 1925. Young had a vision of having lakes, golf courses, a luxury beach hotel, country clubs, and a main street, Hollywood Boulevard; Hollywood is a planned city. On Hollywood Boulevard is the Mediterranean-style Joseph Young Mansion, built around 1921, making it one of the oldest houses in Hollywood.

Hollywood is filled with parks, several golf courses, and sandy beaches that run for more than five miles. The famous Hollywood Beach is known for its great boardwalk that extends approximately 2.5 miles along the Atlantic Ocean. Countless restaurants and hotels line the boardwalk along with a theatre, children's playground, and many other attractions including bicycle rental shops, ice cream parlors, souvenir shops, and a farmer's market. Many of the restaurants offer outdoor seating for patrons to enjoy the seabreeze and scenery. The boardwalk is vibrant and lively and is a scenic place for walking and jogging; there are also bike lanes for bicyclists and rollerblades. In the evenings, many restaurants and the bandshell off Johnson Street showcase musicians and spontaneous dancing may occur on the boardwalk. Young Circle is another exciting area surrounded by dozens of shops, restaurants, and bars. Hollywood is made up of 32 public and charter schools with 13 private schools. The public schools are operated by the Broward County Public Schools.

Learn more about the City of Hollywood by visiting:

www.hollywoodfl.org

THE MUNICIPAL GOVERNMENT

The City Charter prescribes that Hollywood operate under the Commission/Manager form of government. Policy-making and legislative authority are vested in the City Commission,

which consists of a Mayor and six Commissioners. The Mayor is elected at-large, and the Commissioners are elected by district on a non-partisan basis to four-year concurrent terms.

The Commission is responsible for, among other things, passing ordinances, adopting the budget, approving labor contracts and expenditures, appointing committees, and hiring the City Manager and City Attorney. The City Manager is the final appointing authority for all other City employees and is responsible for exercising control over all Departments and Offices. The total Budget for Fiscal year 2020 is \$567,542,781 and there are 1,305 full-time City employees including Police, Fire, Public Works, and a regional Public Utility.

THE DIRECTOR OF FINANCIAL SERVICES ROLE

The Director of Financial Services reports directly to the Assistant City Manager for Finance and Administration, responsible for, but not limited to:

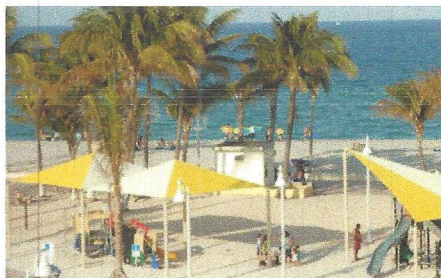
- Administering, directing, and coordinating all activities associated with accounting and financial statements preparation
- Procurement of goods, supplies, materials, services, and equipment, debt management
- Treasury management
- Local business tax and other billings
- Collection of all City revenues.

The Director of Financial Services must maintain a high degree of judgement, discretion, and initiative.

The budget for the Department and Fiscal year 2020 is approximately \$5,266,993 and there are 33 full-time employees in the Department. The Office of Procurement Services will be combined with the Financial Services Department in Fiscal year 2021. In Fiscal year 2020, this Office's budget is approximately \$1,446,490 and there are 8 full time employees.

ESSENTIAL JOB FUNCTIONS AND RESPONSIBILITIES:

- Providing executive level and technical supervision to staff of the Department of Financial Services
- Participation in the formulation and execution of broad City financial and procurement policies.
- Plans, organizes, directs, and reviews all financial procedures and methods and activities related to treasury management, accounting, revenue billing and collection, issuance of local tax receipts, procurement and associated fiscal activities of the City.



- Analyzes City fiscal policies; interprets data; formulates the recommendations for action by the City Manager and the City Commission; approves and controls contracts and financial obligations.
- Plans, develops, proposes, implements, and evaluates financial policies and procedures.
- Administers the investment portfolio of all funds; collects, receives, and maintains custody of all funds; administers relationships with the City's banks and investment brokers.
- Supervises preparation of the Comprehensive Annual Financial Report, interim statements, and reports on City financial affairs to administrative officials, the City Commission, and the public
- Directs the preparation of revenue, expenditures, debt, cost, and other statements; audits and inspects accounts and records.
- Prescribes accounting forms and procedures; supervises continuous audit of units handling cash and maintaining accounting records.
- Administers the selection of municipal advisors, underwriters and other agents associated with municipal debt; coordinates the activities of the City with municipal advisors, underwriters and other agents of municipal debt; plans and executes programs of debt financing or refinancing; represents the City in bond sales and meetings with rating agencies.
- Administers the City's purchasing ordinance and ensures departmental compliance; supervises personnel and their activities in central purchasing.
- Develops, implements, and monitors complex purchasing guidelines, policies and procedures.
- Supervises all Division Directors in the Financial Services Department.
- Prepares standard operating procedures for department divisions, performs strategic planning for overall improvement of department services, evaluates service areas for deficiencies, formulates solutions, and develops action plans.

- Serves as a member of the City Manager's Executive Management Team, reviewing and/or providing input and recommendations for collective bargaining proposals.
- Administers the selection of auditors, including establishing audit selection committee, preparation of request for proposals, required legislation and contract execution.
- Administers the selection, implementation, and enhancement of all financial information systems of the City.

THE IDEAL CANDIDATE'S KNOWLEDGE, SKILLS AND ABILITIES

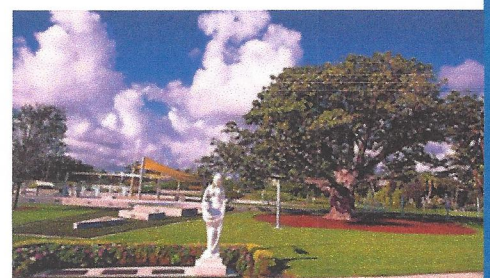
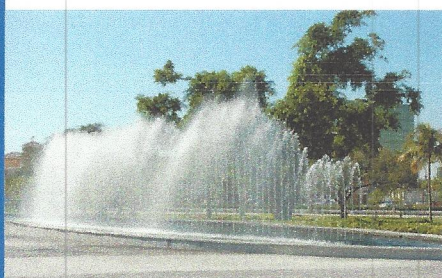
- Thorough knowledge of professional accounting and public finance principles and practices.
- Effectively and positively represents the City in delivering and performing work with colleagues and clients, irrespective of gender, race, religion, age, disability, political affiliation or belief, or sexual orientation.
- Establish and maintain effective and professional relationships with work colleagues, supervisors, and managers.
- Maintains a high degree of judgement, discretion, and initiative.

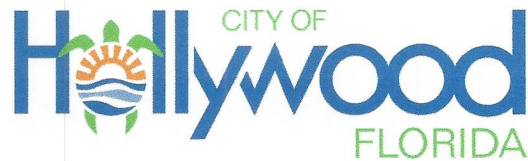
EDUCATION/EXPERIENCE:

The successful candidate will have a minimum:

- Bachelor's Degree in Business, Public Administration, Accounting or Finance
- Ten (10) years of progressively responsible experience in finance, accounting, and procurement; or an equivalent combination of training and experience.
- Master's Degree preferred
- Preferred: Certified Public Accountant, CPFO, CPPO, and/or CGFO.

Additional education and experience or an equivalent combination of training and experience may be substituted for the above requirements.





COMPENSATION AND BENEFITS

Depending on qualifications and experience, the expected starting salary for the successful candidate will be between \$120,411 to 165,000 annually, depending on qualifications.

Employee benefits are competitive and include:

- Medical coverage and dependent coverage.
- Dental plans.
- Vision plans.
- Life Insurance
- Retirement Plan with 7 years vesting.
- Annual Vacation Days (200 hours); on the 4/10 schedule it is 20 days (5 weeks).
- Paid Holidays (13).
- Sick Days (96 hours)
- Personal Days (40 hours).
- Cell phone Stipend
- Automotive Allowance
- And More.

HOW TO APPLY

For additional information on this outstanding opportunity, please contact Dona Higginbotham, Senior Vice President, The Mercer Group, Inc. at, DHHiggin@att.net

Position will remain OPEN UNTIL FILLED

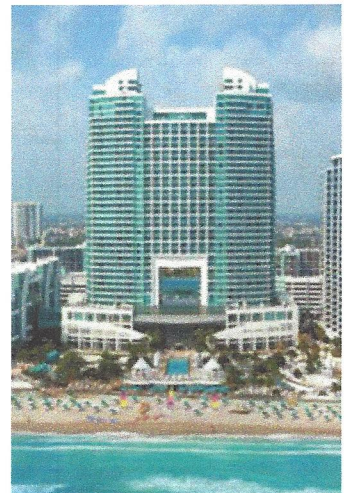
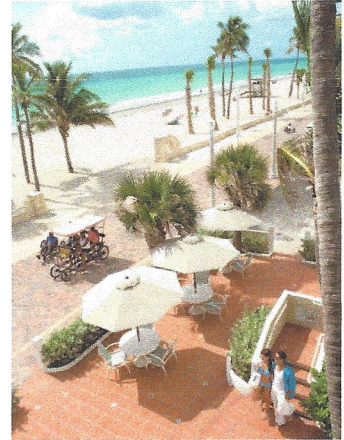
**Interested and qualified candidates should
send a letter of interest and resume to:**

**Dona Higginbotham
Senior Vice President
The Mercer Group, Inc.
Email: DHHiggin@att.net**



Resumes are subject to the provisions of Florida Public Records Statutes

The City of Hollywood is an Equal Opportunity Employer. The City does not discriminate on the basis of race, color, religion, creed, sex, age, marital status, national origin, political ideas, or disability in employment or in the provision of services.



REQUIRED FORMS
PER
RFP 21 - 05

SECTION 9 – REQUIRED FORMS

FORM 9.1 – PROPOSAL SUBMITTAL CHECKLIST

- ☒ Form 9.2 – Proposer’s Acknowledgement
- ☒ Form 9.3 – Addendum and Change Order Procedure Acknowledgement
- ☒ Form 9.4 – Drug Free Preference Statement
- ☒ Form 9.5 – Public Entity Crimes Statement
- ☒ Form 9.6 – Affidavit of Anti-Collusion
- ☒ Form 9.7 – Statement of Qualifications
- ☒ Form 9.8 – Professional References for Previous Experience
- ☒ Form 9.9 – Local Business Affidavit of Eligibility
- ☒ Copy of License (Contractor, Sunbiz, etc.)
- ☒ Submission of one (1) original marked “ORIGINAL” and one (1) digital (CD or flash drive)

version in PDF format.

MERCER GROUP INC dba MERCER GROUP FLORIDA

Name of Business

BY:

Dana Higginbotham
Authorized Signature

09 December 2020
Date

This document must be completed and returned with your Submittal

FORM 9.2 – PROPOSER’S ACKNOWLEDGEMENT FORM

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/ or Special Conditions, Specifications, and any other documents accompanying or made a part of this invitation.

I hereby propose to furnish the goods or services specified in the Request for Statement of Qualifications at the prices or rates as finally negotiated. I agree that my Proposal will remain firm for a period of up to ninety (90) days in order to allow the City of Port Orange adequate time to evaluate the proposed Proposal. Furthermore, I agree to Proposal by all conditions of the Request for Proposals.

I certify that all information contained in this Proposal is truthful to the best of my knowledge and belief. I further certify that I am a duly authorized to submit this Proposal on behalf of the Proposer/Contractor as its act and deed and that the Proposer/Contractor is ready, willing and able to perform if awarded the contract.

I further certify that this Proposal is made without prior understanding, Contract, connection, discussion, or collusion with any person, firm or corporation submitting a Proposal for the same product or service; no officer, employee or agent of the City of Port Orange City Council or of any other Proposer interested in said RFP; and that the undersigned executed this Proposer’s Acknowledgement with full knowledge and understanding of the matters therein contained and was duly authorized to do so.

I further certify that having read and examined the specifications and documents for the designated services and understanding the general conditions for contract under which services will be performed, does hereby propose to furnish all labor, equipment, and material to provide the services set forth in the RFP.

I hereby declare that the following listing states any clarifications, any and all variations from and exceptions to the requirements of the specifications and documents. The undersigned further declares that the “work” will be performed in strict accordance with such requirements and understands that any exceptions to the requirements of the specifications and documents may render the Proposal non-responsive.

NO EXCEPTIONS ALLOWED AFTER THE PROPOSAL IS SUBMITTED:

Please check one: ☒ I take NO exceptions. ☐ Exceptions (list below; add additional pages if necessary):

____MERCER GROUP INC dba MERCER GROUP FLORIDA

3245 S ATLANTIC AVE #607

NAME OF BUSINESS

MAILING ADDRESS

Dona Higginbotham
AUTHORIZED SIGNATURE

DAYTONA BEACH SHORES FL 32118
CITY, STATE & ZIP CODE

Dona Higginbotham Sr VP
NAME, TITLE, TYPED

____386-256-7022____
TELEPHONE NUMBER / FAXNUMBER

____82-2366728____

FEDERAL IDENTIFICATION #

DHHIGGIN@ATT.NET

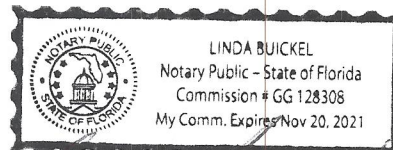
E-MAIL ADDRESS

STATE OF FLORIDA COUNTY OF VOLUSIA

The foregoing instrument was acknowledged before me this day of 9TH OF DECEMBER, 2020 by DONA HIGGINBOTHAM, who is personally known to me or who has produced ad identification and whodid take an oath.

My Commission Expires: 11/20/21 Notary Public

This document must be completed and returned with your Submittal



FORM 9.3 – ADDENDUM and CHANGE ORDER PROCEDURE ACKNOWLEDGEMENT

ADDENDUM ACKNOWLEDGEMENT

I have carefully examined the Request for Proposals (RFP), Instructions to Proposers, General and/ or Special Conditions, Specifications, and any other documents accompanying or made a part of this Request for Statement of Qualifications.

I acknowledge receipt and incorporation of the following addenda, and the cost, if any, of such revisions has been included in the price of the Proposal form.

Addendum # _____ Date: _____ Addendum # _____ Date: _____

Addendum # _____ Date: _____ Addendum # _____ Date: _____

CHANGE ORDER PROCEDURE ACKNOWLEDGEMENT

If awarded the Contract for this Solicitation, I acknowledge that no oral statement of any person shall modify or otherwise change, or affect the terms, conditions or specifications stated in the resulting contract. All change orders requests shall be made in writing by the Contractor for review by the Contract Administrator for the City of Port Orange. No work shall be performed as set forth in the change order until the Contractor receives an executed Purchase Order for the requested change.

I acknowledge the following statement regarding Change Orders to the awarded Contract:

N/A

Name of Business

By: _____

Printed Name: _____

Title: _____

STATE OF FLORIDA
COUNTY OF Volusia

Sworn to (or affirmed) and subscribed before me this 9 day of December, 2020, by
DONA HIGGINBOTHAM as SR VP of
(NAME) (TITLE)
Mercer Group, Inc. and who:
(NAME OF ORGANIZATION)

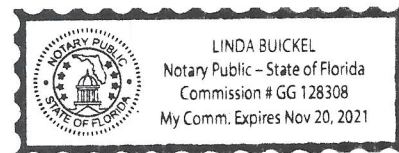
[Notary: Please select one]

is personally known to me; or

has produced _____ as identification.

Linda Buickel
Notary Public, State of Florida

Printed, typed or stamped name, commission and expiration:



This document must be completed and returned with your Submittal

FORM 9.4 – DRUG-FREE PREFERENCE STATEMENT

In order to have a drug-free workplace program, a business shall:

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or contractual services that are under Proposal a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under Proposal, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of Section 287.087, Florida Statutes.

As an authorized representative of the firm, I certify that this firm complies fully with the above requirements.

STATE OF FLORIDA
COUNTY OF VOLUSIA

MERCER GROUP INC dba
MERCER GROUP FLORIDA

Name of Business

By: Dona Higginbotham

Printed Name: DONA HIGGINBOTHAM

Title: Sr. Vice-President

Sworn to (or affirmed) and subscribed before me this 9th day of December, 2020, by
DONA HIGGINBOTHAM, as Sr. Vice President of
(NAME) (TITLE)

MERCER GROUP INC and who:
(NAME OF ORGANIZATION)

[Notary: Please select one]

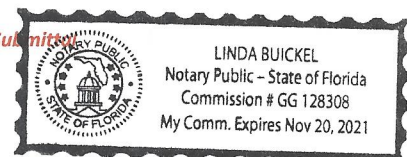
is personally known to me; or
has produced _____ as identification.

Notary Public, State of FLORIDA

Printed, typed or stamped name, commission and expiration:

Linda Buickel

This document must be completed and returned with your Submission.



FORM 9.5 – SWORN STATEMENT UNDER SECTION 287.133(3)(A), FLORIDA STATUTES, ON PUBLIC ENTITY CRIMES

(To be signed in the presence of notary public or other officer authorized to administer oaths.)

Before me, the undersigned Authority, personally appeared affiant DONA HIGGINBOTHAM, who, being by me first duly sworn, made the following statement:

1. The business address of MERCER GROUP FLORIDA (name of Offeror or business) is Sr. Vice President.
2. My relationship to Dona Higginbotham (name of Offeror or business) is _____ (relationship such as sole proprietor, partner, president, vice-president).
3. I understand that a public entity crime as defined in Section 287.133 of the Florida Statutes includes a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity in Florida or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any proposal or contract for goods or services to be provided to any public entity or such an agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy or material misrepresentation.
4. I understand that "convicted" or "conviction" is defined by the Florida Statutes to mean a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, non-jury trial, or entry of a plea of guilt or nolo contendere.
5. I understand that "affiliate" is defined by the Florida Statutes to mean (1) a predecessor or successor of a person or a corporation convicted of a public entity crime, or (2) an entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime, or (3) those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate, or (4) a person or corporation who knowingly entered into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months.
6. Neither the Offeror or contractor, nor any officer, director, executive, partner, shareholder, employee, member or agent who is active in the management of the Offeror or contractor, nor any affiliate of the Offeror or contractor has been convicted of a public entity crime subsequent to July 1, 1989. (Draw a line through paragraph 7 if paragraph 6 applies.)
7. There has been a conviction of a public entity crime by the Offeror or contractor, or an officer, director, executive, partner, shareholder, employee, member or agent of the Offeror or contractor who is active in the management of the Offeror or contractor or an affiliate of the Offeror or contractor. A determination has been made pursuant to Section 287.133(3) by order of the Division of Administrative Hearings that it is not in the public interest for the name of the convicted person or affiliate to appear on the convicted Proposer list. The name of the convicted person or affiliate is _____. A copy of the order of the Division of Administrative Hearings is attached to this statement. (Draw a line through paragraph 7 if paragraph 6 applies.)

MERCER GROUP INC dba Mercer
Group Florida
Name of Business

By: Dona Higginbotham
Printed Name Dona Higginbotham

Title: Sr VP

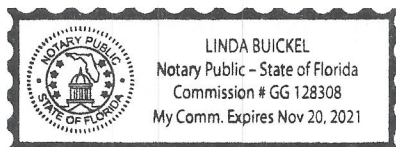
STATE OF FLORIDA
COUNTY OF VOLUSIA

Sworn to (or affirmed) and subscribed before me this 9TH day of December 20 20 by
Dona Higginbotham, as SR. VICE PRESIDENT of MERCER GROUP INC dba MERCER GROUP FLORIDA and who:

[Notary: Please select one]

is personally known to me; or

has produced _____ as identification.



Linda Buickel
Notary Public, State of Florida

Printed, typed or stamped name, commission and expiration:

This document must be completed and returned with your Submittal

FORM 9.6 – ANTI-COLLUSION FORM

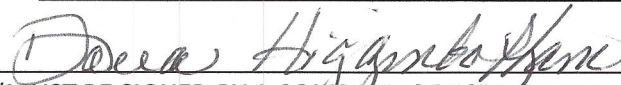
ANTI-COLLUSION STATEMENT PROPOSAL FORM:

By signing this form, the Proposer agrees that this Proposal is made without any other understanding, agreement, or connection with any person, corporation, or firm submitting a Proposal for the same purpose and that the Proposal is in all respects fair and without collusion or fraud.

SIGN in ink in the space provided below. Unsigned Proposals will be considered incomplete, and will be disqualified, and rejected.

IT IS AGREED BY THE UNDERSIGNED PROPOSER THAT THE SIGNING AND DELIVERY OF THE PROPOSAL REPRESENTS THE PROPOSER'S ACCEPTANCE OF THE TERMS AND CONDITIONS OF THE FOREGOING SPECIFICATIONS, CONTRACT AND PROVISIONS, AND IF AWARDED, THIS CONTRACT WILL REPRESENT THE AGREEMENT BETWEEN THE PROPOSERS AND THE CITY OF PORT ORANGE.

NAME OF FIRM: MERCER GROUP IN dba MERCER GROUP FLORIDA

SIGNED BY: 
(MUST BE SIGNED BY A COMPANY OFFICER OR AUTHORIZED AGENT)

PRINTED SIGNATURE: DONA L. HIGGINBOTHAM

TITLE: SR. VICE PRESIDENT

ADDRESS: 3245 SOUTH ATLANTIC AVENUE SUITE 607

CITY: DAYTONA BEACH SHORES STATE: FLORIDA ZIP CODE: 32118

TELEPHONE: 386-256-7022 FAX: _____

COMPLETION TIME: _____

F.E.I.N. NUMBER: 82-2366728

NO Proposal may be withdrawn for a period of ninety (90) days subsequent to the submittal of the Proposals, without the consent of the City of Port Orange.

NOPROPOSAL(REASON): _____

This document must be completed and returned with your Submittal

FORM 9.7 – STATEMENT OF QUALIFICATIONS

The undersigned warrants that he or she is duly authorized to complete this document, and hereby affirms that the information contained in Form 9.7 is complete, true, and correct to the best of their knowledge and belief. If necessary, questions may be answered on separate paper and attached, with any additional information that may be pertinent.

- A. Name of Proposer. Dona Higginbotham Mercer Group Inc dba Mercer Group Florida
B. Permanent main office address. 3245 S Atlantic Ave #607 Daytona Beach Shores, FL
C. Date organized. Mercer Group Inc 1990 – Mercer Group Florida 2017
D. If a corporation, where incorporated.
E. How many years have you been engaged in the contracting business under your present firm or trade name? Mercer Group Inc - 30 years Mercer Group Florida – 10 years
F. Contracts on hand: (Schedule these, showing amount of each contract and the appropriate anticipated dates of completion.) New Port Richey – Anticipated completion – March 2021
City of Hollywood – Ongoing as needed
G. General character of work performed by your company. Search and Recruitment
H. Have you ever failed to complete any work awarded to you? NO If so, where and why?
I. Have you ever defaulted on a contract? NO If so, where and why?
J. List the more important projects recently completed by your company, stating the approximate cost for each and the month and year completed. City of Hollywood – multiple searches
Village of Palmetto Bay – Village Manager
K. List your major equipment currently owned or leased. – owned NA
L. Experience in work similar to this type of project. 20+ YEARS RECRUITMENT EXPERIENCE
M. Background and experience of the principal members of your organization, including the officers. 30+ YEARS
N. Credit currently available: \$ _____
O. Give bank reference: _____
P. Will you, upon request, fill out a detailed financial statement and furnish any other information that may be required by the Owner?
Q. The undersigned hereby authorizes and requests any person, firm, or corporation to furnish any information requested by the Owner in verification of the recitals comprising this Statement of Qualifications.

MERCER GROUP INC dba MERCER GROUP FLORIDA

Name of Business

By: Dona Higginbotham

Printed Name: DONA HIGGINBOTHAM

Title: _____

STATE OF FLORIDA
COUNTY OF VOLUSIA

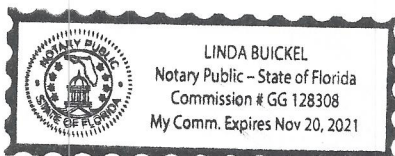
Sworn to (or affirmed) and subscribed before me this 9th day of December, 2020, by

Dona Higginbotham, as SR VP
of Mercer Group Inc and who:

[Notary: Please select one]s personally known to me or has produced as identification.

Linda Buickel
Notary Public, State of FLORIDA

Printed, typed or stamped name, commission
and expiration



This document must be completed and returned with your Submittal

FORM 9.8 – PROFESSIONAL REFERENCES FOR PREVIOUS EXPERIENCE

The Proposer proposes that he/she is qualified to perform the referenced work and has successfully done so on recent projects similar in nature and size. The City reserves the right to check references and confirm information provided herein.

Please provide three (3) current and correct references from clients for similar services. (Do not include the City of Port Orange)

1. Company Name: VILLAGE OF PALMETTO BAY
Contact Person: MAYOR KARYN CUNNINGHAM
City, State: PLAMETTO BAY, FLORIDA
Telephone Number: 305-799-0695
Email Address: kcunningham@palmettobay-fl.gov
Description of goods or
Services provided: SEARCH AND RECRUITMENT SERVICES FOR VILLAGE MANAGER
Contract Amount: \$17, 750.00
Start/End Date of Contract: END OCTOBER 2020
2. Company Name: CITY OF HOLLYWOOD
Contact Person: GEORGE KELLER – DEPUTY CITY MANAGER
City, State: HOLLYWOOD, FLORIDA
Telephone Number: 954-921-3201
Email Address: GKELLER@HOLLYWOODFL.ORG
Description of goods or
Services provided: SEARCH AND RECRUITMENT SERVICES
Contract Amount: \$17,750.00
Start/End Date of Contract: MULTIPLE SEARCHES CONDUCTED - ONGOING AS NEEDED
3. Company Name: City of Palatka
Contact Person: Deborah Robinson
City, State: Palatka, FL
Telephone Number: 386-315-7829
Email Address: DROBINSON@PALATKA-FL.GOV
Description of goods or Services provided: City Manager search
Contract Amount: \$16,750.00
Start/End Date of Contract: Start June 2019 End November 2019

This document must be completed and returned with your Submittal.

LISTING OF PREVIOUS EXPERIENCE

Commercial Client List

The Proposer proposes that he/she is qualified to perform the referenced work and has successfully done so on recent projects similar in nature and size. A minimum of three (3) projects must be listed below. The Owner reserves the right to check references and confirm information provided herein.

List all clients to whom you currently provide or have in the past provided **Architectural Services** equal or similar to those required under the City's contract and as outlined in this Proposal package. A minimum of three (3) projects shall be listed below in order to Proposal on this contract. The Owner reserves the right to check references and confirm information provided herein.

	Contact Name	Phone	Current Client? Y or N	Number of years service provided	Description of service
1	Rodd Hale Asst City Manager	727-853-1016	Y	Current	Search and Recruitment Planning & Community Development Director
2	Tami Thornton Human Resources		Y and N	Current and Completed work 2020	Multiple searches • Parks, Rec Director - closed • Director Financial Services - closed • Dep Dir Public Utilities / Finance - closed • Deputy City Attorney - interviewing • Asst Dir Public Utilities/ Engineering – Open until filled
3	Village of Palmetto Bay Mayor Karyn Cunningham	305-799-0695	N	Completed Oct 2020	Village Manager search and recruitment - completed

This document must be completed and returned with your Submittal.

FORM 9.9 – LOCAL BUSINESS AFFIDAVIT OF ELIGIBILITY

City of Port Orange

*This declaration is executed under penalty of perjury of the laws to the United States and State of Florida***THIS AFFIDAVIT IS SUBMITTED IN REFERENCE TO THE FOLLOWING SOLICITATION:**RFSQ/RFP/ITN/BID/CONTRACT/PROJECT#(as applicable): RFP 21-05

BUSINESS NAME: Mercer Group Florida CONTACT PERSON/TITLE: Dona Higginbotham Sr. VP

MAILING ADDRESS: 3245 S Atlantic Ave #607CITY-STATE-ZIP Daytona Beach Shores, FL 32118 Length of Time at Address Provided: 5 yearsPhysical Presence of Business: ☐ Headquarters, ☐ Manufacturing Facility, or ☐ Locally Owned FranchiseAnd within Legal Boundaries: ☐ The City of Port Orange ☒ Volusia County ☐ The State ofFlorida FEIN (Federal Employer Identification Number): 82-2366728BUSINESS STRUCTURE: ☒ Corporation ☒ LLC ☐ Partnership ☐ Sole Proprietorship☐ Other (Specify): _____PHONE NUMBER: 386-256-7022 FAX: _____EMAIL: DHHiggin@att.net****Please attach a valid business tax receipt, or other such documentation******ATTESTATION – I understand that:**

- In accordance with City Of Port Orange City Code 2-275, local businesses shall have five (5) business days from bid/proposal opening to submit a best and final bid for evaluation. To qualify: A Port Orange business initial bid must be within (8%) of the lowest and best responsible bid from a non-Port Orange business; A Volusia County business initial bid must be within (5%) of the lowest and best responsible bid from a Non-Volusia County business; A State of Florida business initial bid must be within (3%) of the lowest and best responsible bid from a non-State of Florida business.
- A local business must have its headquarters, manufacturing facility, or locally owned franchise located within the legal boundaries of the City of Port Orange, Volusia County, or the State of Florida, as indicated herein, for at least twelve (12) months prior to the bid or proposal opening date and a valid business license, issued by the corresponding government agency. Post office boxes are not verifiable and shall not be used for the purpose of establishing said physical address. Bidders shall attach to this affidavit of eligibility with a bid or proposal, a copy of a valid business tax receipt or such other documentation, to the city's satisfaction, demonstrating the physical business presence of the firm within corresponding local limits.
- The preference does not apply to goods or services exempted by statute or prohibited by Federal law, State law, or other funding source restrictions.
- The preference established in this policy does not prohibit the right of the City, or other authorized purchasing authority, to compare quality or fitness for use of supplies, materials, equipment and services proposed for purchase and compare qualifications, character, responsibility and fitness of all persons, firms or corporations submitting bids or proposals.
- The information contained herein may be subject to verification.
- A Proposer who misrepresents the local preference status of its firm in a proposal or bid submitted to the City of Port Orange will lose the privilege to claim local preference status, and shall lose eligibility to claim local preference for a period of one (1) year. The City Manager may also recommend that the firm be referred for debarment.

As an authorized representative of the firm, I certify that this firm complies fully with the above requirements

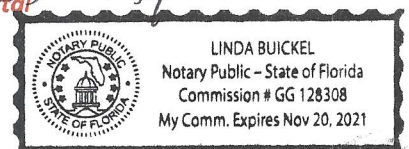
Mercer Group Florida

Name of Business

By: Dona HigginbothamPrinted Name: Dona HigginbothamTitle: Sr VPSTATE OF FloridaCOUNTY OF Volusia

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this 9th day of December, 2020, by Dona Higginbotham as SR VP of Mercer Group Inc, a. He or she is personally known or produced

Notary Public, State of Florida
 Printed, typed or stamped name, commission and expiration:

This document must be completed and returned with your Submittal



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by Entity Name](#) /

Detail by Entity Name

Florida Limited Liability Company
MERCER GROUP FLORIDA, LLC

Filing Information

Document Number L17000165017
FEI/EIN Number 82-2366728
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State FL
Status ACTIVE
Last Event REINSTATEMENT
Event Date Filed 10/19/2020

Principal Address

3245 S ATLANTIC AVENUE
SUITE 607
DAYTONA BEACH SHORES, FL 32118

Mailing Address

P.O. BOX 7312
DAYTONA BEACH SHORES, FL 32116-7312

Changed: 03/13/2018

Registered Agent Name & Address

HIGGINBOTHAM, DONA L
3245 S ATLANTIC AVENUE
SUITE 607
DAYTONA BEACH SHORES, FL 32118

Name Changed: 10/16/2019

Authorized Person(s) Detail

Name & Address

Title AMBR

HIGGINBOTHAM, DONA L
3245 S ATLANTIC AVE, SUITE 607
DAYTONA BEACH SHORES, FL 32118

Title President

ATTACHMENT 1 – PROPOSAL FORM

"ATTACHMENT 1" SCHEDULE OF UNIT PRICING

PROPOSAL FORM

CITY OF PORT ORANGE

RFP# 21-05

Executive Search Services

Completed Attachment 1 Bid Proposal form MUST be included with Bid Submission

Instruction to save Attachment from DemandStar website:

Perform "File Save As" and save spreadsheet to your computer. Fill in pricing in highlighted cells, preferably electronically.

Bidders are required to complete all fields shaded in green. All other fields will be automatically calculated.

NAME OF BUSINESS: Mercer Group Inc dba Mercer Group Florida

CONTACT PERSON: Dona Higginbotham

EMAIL ADDRESS: dhhiggin@att.net

AUTHORIZED NAME:

AUTHORIZED SIGNATURE:

PROPOSAL

Item	Description	Unit Price
	GENERAL	
1	COST PER SCOPE OF SERVICES	\$17,750.00 plus expenses

This document must be completed and returned with your Submittal

AFFIDAVIT REGARDING WORKERS' COMPENSATION

IMPORTANT

This certificate must be completed and returned by the Awarded Vendor, upon issuance of a Notice of Intent to Award by the Purchasing Department of the City of Port Orange. Please note, the City of Port Orange does not accept exemptions for Workers' Compensation coverage.

State of FLORIDA

County of VOLUSIA

I, _____, being duly sworn according to law, deposes and says (it, he, she, they) have accepted the Workers' Compensation laws of the State of Florida, with its supplements and amendments and has insured (its, his, her, their) liability there under accordance with the terms of said Laws with the _____ Company, under the terms of Policy Number _____ for a period from _____, 20__ to _____, 20__.

WITNESS.

By: Marcial Gomez

Name: Marcial Gomez

CONTRACTOR:

Company:

Mercer Groiup Inc dba Mercer Group
Florida

By: Dona Higginbotham

Name/Title: SR.VP

STATE OF FLORIDA

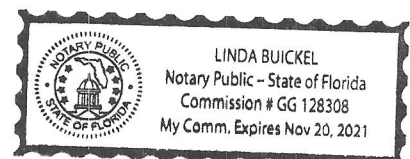
COUNTY OF VOLUSIA

The foregoing instrument was acknowledged before me by means of physical presence or _____ online notarization, this 9TH day of DECEMBER, 2020, by DONA HIGGINBOTHAM, as SR VICE PRESIDENT of MERCER GROUP INC, a _____. He or she is _____ personally known or _____ produced _____ as identification.

LINDA BUICKEL

Notary Public, State of FLORIDA

Printed, typed or stamped name, commission and expiration:



**CERTIFICATE OF INSURANCE
FOR WORKERS' COMPENSATION**

IMPORTANT

This certificate must be completed and returned by the Awarded Vendor, upon issuance of a Notice of Intent to Award by the Purchasing Department of the City of Port Orange. Please note, the City of Port Orange does not accept exemptions for Workers' Compensation coverage. This certificate must be completed by a duly authorized official of the Insurance Company carrying the risk, or a separate certificate of similar context executed On Insurance Company's Standard Form may be attached hereto.

This is to certify that Mercer Group Inc dba Mercer Group Florida, Company has issued To the Finance Department, of the City of Port Orange, State of Florida, the following policy or policies:

Workers' Compensation and Employer's Liability Policy No.

Commercial General Liability Policy # 39SBvv1896

Worker's Compensation Liability Policy # 30WECAB4F1H

Professional Errors & Omission Policy # PHSD150797 Effective on August 20, 2020, 20, and expiring on July 14, , 2021. Description of limits: SEE ATTACHED

If at any time this coverage is to be cancelled, the undersigned will notify the insured and the _____ in writing thirty (30) days prior to cancellation of policy.

WITNESS:

By: _____

Name: _____

INSURANCE COMPANY:

Company: Philedelphia Insurance Co.

By: Caitlin Magdalinski

Name/Title: Sr. Account Executive



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

08/20/2020

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER	Maguire Insurance Agency One Bala Plaza, Suite 100 Bala Cynwyd, Pa 19004	CONTACT NAME: Caitlin Magdalinski PHONE (A/C, No, Ext): 610 617 7704 E-MAIL: caitlin.magdalinski@vfib.com ADDRESS:	FAX (A/C, No):
INSURED	The Mercer Group, Inc 28 Sierra Del Sol Santa FE, NM 87508	INSURER(S) AFFORDING COVERAGE	NAIC #
		INSURER A : Philadelphia Insurance Co	18058
		INSURER B : Hartford Insurance Company	29424
		INSURER C :	
		INSURER D :	
		INSURER E :	
		INSURER F :	

COVERAGES

CERTIFICATE NUMBER:

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
B	COMMERCIAL GENERAL LIABILITY CLAIMS-MADE ☒ OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY ☐ PRO-JECT ☐ LOC OTHER:			39SBAVV1896	6/20/2020	6/20/2021	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 1,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ 4,000,000
B	AUTOMOBILE LIABILITY ANY AUTO OWNED AUTOS ONLY ☒ HIRED AUTOS ONLY ☐ SCHEDULED AUTOS ☒ NON-OWNED AUTOS ONLY			39SBAVV1896	6/20/2020	6/20/2021	COMBINED SINGLE LIMIT (Ea accident) \$ 2,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB EXCESS LIAB DED RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
B	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N ☐	N/A	30WECAB4F1H	7/14/2020	7/14/2021	☒ PER STATUTE E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000
A	Professional Errors & Omissions			PHSD1507078	02/06/2020	02/06/2021	Per Claim \$2,000,000 Aggregate \$2,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

The Mercer Group, Inc 28 Sierra Del Sol Santa FE, NM 87508	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.
	AUTHORIZED REPRESENTATIVE Shamora Lowe

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This certificate must be completed and returned by the Awarded Vendor, upon issuance of a Notice of Intent to Award by the Purchasing Department of the City of Port Orange. Please note, the City of Port Orange does not accept exemptions for Workers' Compensation coverage.

LEASED EMPLOYEE AFFIDAVIT
EXHIBIT CONTRACT # _____

XI hereby certify that I do not utilize an employee leasing company or employee leased employees. I further agree to notify the City in the event these circumstances change.

OR

☐ I affirm that an employee leasing company provides my workers' compensation coverage. I further understand that my contract with the employee leasing company limits my workers' compensation coverage to enrolled worksite employees only. My leasing arrangement does not cover un-enrolled worksite employees, independent contractors, uninsured sub-contractors or casual laborexposure.

I hereby certify that 100% of my workers are covered as worksite employees with the employee leasing company. I certify that I do not hire any casual or uninsured labor outside the employee leasing arrangement. I agree to notify the City in the event that I have any workers not covered by the employee leasing workers' compensation policy. In the event that I have any workers not subject to the employee leasing arrangement, I agree to obtain a separate workers' compensation policy to cover these workers. I further agree to provide the City with a certificate of insurance providing proof of workers' compensation coverage prior to these workers entering any Cityjobsite.

I further agree to notify the City if my employee leasing arrangement terminates with the employee leasing company and I understand that I am required to furnish proof of replacement workers' compensation coverage prior to the termination of the employee leasing arrangement.

I certify that I have workers' compensation coverage for all of my workers through the employee leasing arrangement specified below:

Name of Employee Leasing Company: _____

Workers' Compensation Carrier: _____

A.M.Best Rating of Carrier: _____

Inception Date of Leasing Arrangement: _____

I further agree to notify the City in the event that I switch employee-leasing companies. I recognize that I have an obligation to supply an updated workers' compensation certificate to the City that documents the change of carrier.

I hereby attest that the information provided in this affidavit is accurate. In addition, I certify that I have read and understand the above statements regarding my responsibility under the Workers' Compensation coverage.

Name of Contractor: MERCER GOUPR INC dba MERCER GROUP FLORIDA

Signature of Owner/Officer: _____

Title: SR. VICE PRESIDENT Date: 09 DECEMBER 2020



CITY OF PORT ORANGE STANDARD CONTRACT FOR SERVICES

This Standard Contract for Services ("Contract") is entered into this 9 t h day of December, 2020, by and between the **CITY OF PORT ORANGE**, a Florida municipal corporation, whose principal address is 1000 City Center Circle, Port Orange, Florida 32129 (the "City"), and **MERCER GROUP INC dba MERCER GROUPFLORIDA** corporation whose principal address is 3245 S Atlantic Ave Daytona Beach Shores, FL (The City and collectively referred to herein as the "Parties.") Contractor are

1. Provision of Services

- (a) The Contractor hereby agrees to provide Executive Management Search Firm Services as outlined in Request for Proposal 21-05, Addenda, if any, and Contractor's proposal ("Services"). This Contract, together with the Request for Proposal 21-05 ("RFP 21-05"), Addenda, and Contractor's proposal, all of which are made a part hereof by reference, shall constitute the formal written contract between the City and Contractor, hereinafter "Contract". For convenience, Section 3, Scope of Services of RFP 21-05, Addenda, and the Contractor's response as submitted by Contractor in Contractor's Proposal, are attached hereto as Exhibit "1". A complete copy of RFP 21-05, Addenda, and Contractor's Proposal are available in the Office of the City Clerk, City Hall, 1000 City Center Circle, Port Orange, Florida. Contractor represents that they are familiar with the documents that make up the Contract, as referenced hereinabove.

- (b) The time, manner and place for performance of such services shall be:

Term: The term of this Contract shall commence on the date this Contract is signed on behalf of the City and shall continue thereafter until a City Manager is hired and on the job. The City desires to have a new City Manager hired and ready to start work on May 3, 2021.

Manner and Place: As outlined in RFP 21-05 and any attachments of exhibits to this Contract whether delivered herewith or subsequently approved as a part thereof, and in a manner as required by all current federal, state, county, fire, building and land development codes, laws, ordinances and regulations, and with applicable permits and licenses per the City Code of Ordinances. Contractor shall not deliver goods or services without a written purchase order, signed by an authorized agent of the City of Port Orange.

Time and Essence: Contractor acknowledges that time is of the essence for the Purchase Order(s) or Notice to Proceed issued hereunder.

Authorization for Services: This Contract standing alone does not authorize the purchase of any goods or services or require the City to place any orders for goods or service. Authorization for the purchase of goods or services from Contractor under this Contract shall be upon issuance of a Notice to Proceed and a written Purchase Order issued and executed by the City. The City reserves the right to contract with other parties for the goods and services contemplated by this Contract, as determined in the City's sole and absolute discretion.

2. City Obligations. In return for the services identified above, the City agrees to compensate Contractor at the prices set forth in Exhibit " " attached hereto, subject to a limit up to but **not to exceed \$20,000.00**. The City's obligation to pay Contractor under this Contract is limited to the budgeted amount for the fiscal year approved by the Port Orange City Council for the then current fiscal year. All payments shall be governed by the Local Government Prompt Payment Act as set forth in Sections 218.70 through 218.79, Florida Statutes, as amended.

3. Contract Administration. The Administrative Services Director, Jamie Miller, shall perform contract administration of this Contract. The City may change the contract administrator, from time to time and at any time, upon written notice to Contractor. For notice provisions, see the paragraph below entitled "Notice."

4. Liens. Contractor acknowledges that Contractor shall not be entitled to lien the City or other public property.

5. Termination for Convenience of the City

(a) The parties agree that the City may terminate this Contract, or any work or delivery required hereunder, from time to time either in whole or part, whenever the City Manager of Port Orange shall determine that such termination is in the best interest of the City.

(b) Termination, in whole or in part, shall be effected by delivery of a Notice of Termination signed by the City Manager or his designee, mailed or delivered to the Contractor, and specifically setting forth the effective date of termination.

(c) Upon receipt of such Notice, the Contractor shall:

- (i) cease any further deliveries or work due under this Contract, on the date, and to the extent, which may be specified in the Notice;
- (ii) place no further orders with any subcontractors except as may be necessary to perform that portion of this Contract not subject to the Notice;
- (iii) terminate all subcontracts except those made with respect to contract performance not subject to the Notice;
- (iv) settle all outstanding liabilities and claims which may arise out of such termination, with the ratification of the Finance Director of Port Orange; and
- (v) use best efforts to mitigate any damages which may be sustained by the Contractor as a consequence of termination under this clause.

(d) After complying with the provisions of subparagraph (c), above, the Contractor shall submit a termination claim, in no event later than six (6) months after the effective date of termination, unless one or more extensions of three (3) months each are granted by the Finance Director.

(e) The Finance Director, with the approval of the City Manager, shall pay from the using department's budget, reasonable costs of termination, including a reasonable amount for profit on supplies or services delivered or work completed. In no event shall this amount be greater than the original contract price, reduced by any payments made prior to Notice of Termination, and further reduced by the price of the supplies not delivered or the services not provided. This Contract shall be amended accordingly, and the Contractor shall be paid the agreed amount.

(f) In the event that the parties cannot agree on the whole amount to be paid to the Contractor by reason of termination under this clause, the Finance Director shall pay the Contractor the amounts determined as follows, without duplicating any amounts which may have already been paid under the preceding paragraph of this clause:

- (i) With respect to all Contract performance prior to the effective date of Notice of Termination, the total of:
 - (1) the cost of work performed or supplies delivered;
 - (2) the cost of settling and paying any reasonable claims as provided in paragraph (c) (iv), above;
 - (3) a sum as profit on (a) determined by the Finance Director to be fair and reasonable.
- (ii) The total sum to be paid under (i) above shall not exceed the contract price, as further reduced by the contract price of work or supplies not terminated.

(g) In the event that the Contractor is not satisfied with any payments which the Finance Director shall determine to be due under this clause, the Contractor may appeal any claim to the City Council in accordance with Paragraph 20 of this contract concerning disputes.

6. Termination for Convenience for Subcontractors. In accordance with the termination for the convenience of the City provision of this contract, the Contractor shall include similar provisions in any subcontract, and shall specifically include a requirement that subcontractors make all reasonable efforts to mitigate damages which may be suffered. Failure to include such provisions shall bar the Contractor from any recovery from the City whatsoever of loss or damage sustained by a subcontractor as a consequence of termination for convenience.

7. Termination for Default. Either party may terminate this Contract, without further obligation, for the default of the other party or its agents or employees with respect to any agreement or provision contained herein. In the event of default by the contractor, the City reserves the right to procure the item(s) bid from other sources and holds the bidder responsible for excess costs incurred as a result. City Council may elect to refrain from doing business with the bidder as stipulated in City Code 2-276 Suspension and Disbarment.

8. Examination of Records

(a) The Contractor agrees that the City, or any duly authorized representative, shall, until the expiration of five (5) years after final payment hereunder, have access to and the right to examine and copy any pertinent books, documents, papers and records of the Contractor involving transactions related to this Contract.

(b) The Contractor further agrees to include in any subcontract for more than \$10,000 entered into as a result of this Contract, a provision to the effect that the subcontractor agrees that the City or any duly authorized representative shall, until the expiration of five (5) years after final payment under the subcontract, have access to and the right to examine and copy any pertinent books, documents, papers and records of such contractor involved in transactions related to such subcontract, or this Contract. The term subcontract as used herein shall exclude purchase orders for public utility services at rates established for uniform applicability to the general public.

(c) The period of access provided in subparagraphs (a) and (b) above for records, books, documents and papers which may relate to any arbitration, litigation, or the settlement of claims arising out of the performance of this contract or any subcontract shall continue until any appeals, arbitration, litigation or claims shall have been finally disposed of.

9. Public Records Compliance. Contractor shall comply with public records laws as set forth in Chapter 119, Florida Statutes, and shall specifically:

- (a) Keep and maintain public records required by the City to perform the service.
- (b) Upon request from the City's custodian of public records, provide the City with a copy of the requested record or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided in Section 119, Florida Statutes, or as otherwise provided by law.
- (c) Ensure that public records that are exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the Contract term and following completion of the Contract if the Contractor does not transfer the records to the City.
- (d) Upon completion of the Contract, Contractor shall transfer to the City, at no cost, all public records in possession of the Contractor and destroy any duplicate public records that are exempt from public records disclosure requirements. All records stored electronically must be provided to the City, upon request from the City's custodian of public records, in a format that is compatible with the information technology systems of the City.

If Contractor does not comply with a public records request, the City shall deem the non-compliance a breach of this Contract, and the Contractor may be subject to penalties under Section 119.0701, Florida Statutes.

CONTRACTOR QUESTIONS RELATING TO CONTRACTOR'S DUTIES TO PROVIDE PUBLIC RECORDS RELATING TO THIS CONTRACT MUST BE FORWARDED TO THE OFFICE OF THE CITY CLERK, CITY HALL, 1000 CITY CENTER CIRCLE, PORT ORANGE, FLORIDA 32129; TELEPHONE: (386) 506-5563; E-MAIL: CITYCLERK@PORT-ORANGE.ORG.

10. Termination for Non-Appropriation of Funds

- (a) If funds are not appropriated for any succeeding fiscal years subsequent to the one in which this contract is entered into, for the purpose of this Contract, then the City may terminate this Contract upon thirty (30) days prior written notice to the Contractor. Should termination be accomplished in accordance with this Section, the City shall be liable only for payments due through the date of termination.
- (b) The City agrees that should it terminate in accordance with this Section, it shall not obtain services which are substantially equal to or similar to those for which this contract was entered into. This provision shall survive any termination of the Contract.

11. Insurance. Contractor shall maintain insurance, as required herein, during the life of this Contract. Contractor shall provide to the City, a certificate of insurance endorsing the City of Port Orange as an additional named insured. All insurance coverages of the Contractor shall be primary and non-contributory. All insurance coverages of the Contractor shall not seek contribution from any other insurance or self-insurance available to the City. For workers' compensation coverage, the Contractor's insurance certificate shall include the insurer's waiver of subrogation in lieu of endorsing the City as an additional insured for workers' compensation. The City shall not accept Workers' Compensation Exemptions Contractor may use leased employees if the Contractor ensures that all workers who access the jobsite are employees covered by the employee leasing company, and no non-employees are permitted to access the jobsite. Any Contractor using a leased employee shall complete the City's Leased Employee Affidavit Form Exhibit. Policies for Workers' Compensation may be issued by companies authorized as a group self-insurer by F.S. 440.572.

Policies other than Workers' Compensation shall be issued by insurers licensed and/or duly authorized under Florida Law to do business in the State of Florida and all insuring companies are required to have a minimum rating of "A-" in the "Best Key Rating Guide" published by A.M. Best & Company, Inc. Contractor shall not

commence work under this Contract until the City has received a certificate or certificates of insurance with endorsement evidencing the required insurance. Insurer shall provide the City written notice of cancellation, nonrenewal or any other changes in coverage no later than thirty (30) days prior to the effective date of the change and shall provide notice to the City no later than 10 days after non-payment. The Certificates of Insurance and required insurance policies shall contain provisions that thirty (30) days prior written notice shall be given to the City of any cancellation, intent not to renew, or reduction in the policies or coverages.

Contractor shall require and ensure each of its subcontractors to maintain, until the completion of the subcontractor's work, insurance of the types and to the limits set forth herein. All insurance coverages shall be primary and non-contributory. All insurance coverages of the subcontractors shall not seek contribution from any other insurance or self-insurance available to the City. The Contractor is responsible for ensuring that its subcontractors maintain the required coverage. Failure of the Contractor to ensure the subcontractors maintain the required coverage, shall not relieve the Contractor of any contractual responsibility, obligation or liability.

The City reserves the right to increase insurance coverage as determined for higher risk contracts.

The acceptance by the City of any Certificate of Insurance does not constitute approval or agreement by the City that the insurance requirements have been satisfied or that the insurance policy shown on the Certificate of Insurance is in compliance with this Contract and does not waive the insurance required by this Contract.

Should at any time the Contractor or subcontractors not maintain the insurance coverages required herein, the City may terminate the Contract or at its sole discretion shall be authorized to purchase such coverages and charge the Contractor for such coverages purchased. The City shall be under no obligation to purchase such insurance, nor shall it be responsible for the coverages purchased or the insurance company or companies used. The decision of the City to purchase such insurance coverages shall in no way be construed to be a waiver of any of its rights under the Contract.

Standard Insurance Requirements				
	Insurance	Standards		Additional Requirements
☒	<u>Workers' Compensation</u> The Contractor shall maintain coverage for its employees with statutory workers' compensation limits, and no less than the limits indicated in the Schedule of Limits for Employers' Liability. Said coverage shall include a waiver of subrogation in favor of the City. The City will not accept elective exemptions. Any contractor using an employee leasing company shall complete the Leased Employee Affidavit Form Exhibit.	<u>Contract Amount</u> Up to \$10 million \$10 - \$20 million Contracts over \$20 million To Be Determined by the City.	<u>Limits</u> Statutory/\$500,000 Statutory/\$1,000,000	☐ If Contract requires work on or about navigable waters, Longshoreman's and Harbor Workers' Coverage required. ☐ If vessels involved, Jones Act coverage with limits of \$500,000 required.

☒	Comprehensive General Liability (including Completed Operations and Contractual Liability)	<u>Limits:</u> Combined Single Limit Bodily Injury and Property damage \$1,000,000 occurrence \$1,000,000 aggregate	☐ When work is on or under Railroad rights of way or properties, the Contractor shall take out and maintain during the life of the Contract, Railroad protective liability and property damage insurance in amounts as requested by the Railroad.
☒	Comprehensive Business, Automobile Liability to include all owned, hired and non-owned automobiles.	<u>Limits:</u> Auto Liability Body Injury and Property Damage: \$1,000,000 each occurrence \$1,000,000 aggregate	
Additional Insurance Requirements			
☐	Property Insurance Builders Risk. <u>Additional Coverage:</u>	<u>Limits:</u> Buildings - Completed value of Contract. "All Risk" coverage on latest ISO for or its equivalent. Permission granted to occupy. Owner named as insured AIMA	If Agreement requires handling or installation of Owner's equipment, coverage should be furnished on "All Risk" form, including transit and Owner shall be named.
☒	Professional Liability	<u>Limits:</u> Coverage - \$1,000,000	
☐	Installation Floater (IT)	<u>Limits:</u> Coverage - \$ <u>To be determined.</u>	
☐	Contractor Pollution Liability	<u>Limits:</u> Coverage - \$1,000,000	
☒	Errors and Omissions	<u>Limits:</u> Coverage - \$1,000,000	
☐	Umbrella Policy	<u>Limits:</u> Coverage - \$ <u>To be determined.</u>	
☐	Payment and Performance Bond Required	<u>Limits:</u> Coverage - Equal to amount of Contract.	
☐	City Manager waives Payment and Performance Bond for work under \$25,000.00.		
☐	Unless otherwise required by law, City Manager waives Insurance for FOB goods under \$25,000.00.		

12. A Contract for the purchase of supplies shall be governed by the City of Port Orange Code of Ordinances, as amended, and such supplies shall be deemed "goods," as defined therein.

13. Assignability of Contract. Neither this contract, nor any part hereof, may be assigned by the Contractor to any other party without the express written approval of the City Council.

14. Modifications or Changes to this Contract

(a) Change Orders. The Department Head, with the concurrence of the City's signatory as required by the City's Purchasing Policy, shall without notice to any sureties, have the authority to order changes in this Contract which affect the cost or time of performance. Such changes shall be ordered in writing specifically designated to be a change order. Such orders shall be limited to reasonable changes in the services to be performed or the time of the performance. The City will not be held liable for any changes which have not been properly authorized and approved in accordance with this Contract.

(b) If any change under this clause causes an increase or decrease in Contractor's cost of, or time required for the performance of the work hereunder, Contractor shall receive an equitable adjustment in accordance with subparagraph (d), which shall include all compensation to the Contractor, or the City, of any kind in connection with such change, including all costs and damages related to or incidental to such change.

(c) Contractor need not perform any work described in any change order unless it has received a certification from the City that there are funds budgeted and appropriated sufficient to cover the cost of such changes.

(d) No claim for changes ordered hereunder shall be considered if made after final payment in accordance with the Contract.

15. Sovereign Immunity. The City expressly retains all rights, benefits and immunities of sovereign immunity in accordance with Section 768.28, Florida Statutes. Notwithstanding anything set forth in any section of this Contract to the contrary, nothing in this Contract shall be deemed as a waiver of immunity or limits of liability of the City beyond any statutory limited waiver of immunity or limits of liability which may have been adopted by the Florida Legislature or may be adopted by the Florida Legislature and the cap on the amount and liability of the City for damages regardless of the number or nature of claims in tort or equity shall not exceed the dollar amount set by the legislature for tort. Nothing in this Contract shall inure to the benefit of any third party for the purpose of allowing any claim against the City which would otherwise be barred under the Doctrine of Sovereign Immunity or operation of law.

16. Warranties/Guarantees. Contractor guarantees services to be delivered to the City of Port Orange as stated in the Contractor's proposal dated 09 DECEMBER 2020 as previously referenced herein and made part of this

Agreement. This guarantee includes replacement of successful candidate for twenty-four (24) month period following the date of placement with the client, at no additional professional fees.

17. Inspection

(a) All supplies (which term throughout this clause includes without limitation raw materials, components, intermediate assemblies, and their products) shall be subject to inspection and test by the City, to the extent practicable at all times and places including the place of manufacturer, and in any event prior to acceptance.

(b) In the event any supplies or lots of supplies are defective in material or workmanship, or otherwise not in conformity with the requirements of this Contract, the City shall have the right either to reject them (with or without instructions as to their disposition) or to require their correction. Supplies or lots of supplies which have been rejected or required to be corrected shall be removed or, if permitted or required by the Finance Director, corrected in place by and at the expense of Contractor promptly after notice, and shall not thereafter be tendered for acceptance unless the former rejection or requirement of correction is disclosed. If Contractor fails promptly to remove such supplies or lots of supplies which are required to be removed or promptly to replace or correct such supplies or lots of supplies, the City may either (i) by contract or otherwise replace or correct such supplies and charge Contractor the cost for such replacement or correction; or (ii) may terminate this Contract for default as provided in the clause of this Contract entitled "Termination for Default." Unless Contractor corrects or replaces such supplies within the delivery schedule, the Finance Director may require the delivery of such supplies at a reduction in price, which is equitable under the circumstances. Acceptance or rejection of the supplies shall be made as promptly as practicable after delivery, except as otherwise provided in this Contract. Failure to inspect and accept or reject supplies shall neither relieve Contractor from responsibility for such supplies as are not in accordance with the Contract requirements nor impose liability on the City therefor.

(c) The inspection and test by the City of any supplies or lots thereof does not relieve Contractor from any responsibility regarding defects or other failures to meet the Contract requirements, which may be discovered prior to acceptance. Except as otherwise provided in this Contract, acceptance shall be conclusive except as regards latent defects, fraud, or such gross mistakes as amount to fraud.

18. Liability for Loss or Damage.

(a) Contractor shall be liable for any loss of, or damage to, City property caused by the negligence, recklessness, or intended wrongful misconduct of Contractor, his/its agents, servants and employees and shall indemnify and save the City harmless against all actions, proceedings, claims, demands, costs, damages and expenses, including attorney's fees, by reason of any suit or action brought for any actual or alleged injury to or death of any person or damage to property other than City property, resulting from the performance of the Contract by Contractor, his/its agents, servants and employees. Contractor shall submit a full written report to the Finance Director within twenty-four (24) hours following the occurrence of such damage, loss or injury.

(b) To the fullest extent permitted by law, in addition to the express duty to indemnify City when there is any causal connection between Contractor's work and any injury, loss, damage, death or property damage, Contractor expressly undertakes a duty to defend City as a separate duty, independent of and broader than the duty to indemnify. The duty to defend agreed to by Contractor hereby expressly include all costs of litigation, attorney's fees, settlement costs and reasonable expenses in connection with the litigation, whether or not the claims made for loss, injury, damage or property damage are valid or groundless and regardless of whether the defense of City is maintained by the City or assumed by Contractor as long as the claims made could be causally connected to Contractor as reasonable determined by City.

19. Non-discrimination. During the performance of this Contract, Contractor agrees as follows:

(a) Contractor will not discriminate against any employee or applicant for employment because of race, religion, color, sex, disability, marital status, age or national origin, except where such is a bona-fide occupational qualification reasonably necessary to the normal operation of Contractor. Contractor agrees to post in conspicuous places, available to employees and applicants for employment, notices setting forth the provisions of this non-discrimination clause. Contractor agrees and fully supports and complies with the Americans with Disabilities Act of 1990.

(b) Contractor shall state in all solicitations or advertisements for employees placed by or on behalf of Contractor that Contractor is an equal opportunity employer.

(c) Notices, advertisements and solicitations placed in accordance with federal law, rule or regulation shall be deemed sufficient compliance with this provision. Contractor shall include the provisions of the foregoing subparagraphs (a), (b), and (c) in every subcontract or purchase order of over \$10,000 so that the provisions will be binding upon each subcontractor or vendor.

20. Disputes. The City Manager, who shall reduce his decision to writing and mail or otherwise furnish a copy thereof to Contractor, shall decide disputes with respect to this Agreement. The decision by the City Manager shall be final and binding unless, within five (5) business days from the date of delivery of the decision of the City Manager, appeal is made to the City Council in writing and delivered to the City Clerk, Robin L. Fenwick, CMC. The decision of the City Council shall be final and binding unless set aside by a court of competent jurisdiction as fraudulent, capricious, arbitrary, or so grossly erroneous as necessary to imply bad faith, or not to be supported by any evidence.

21. Force Majeure. Neither party shall be liable for any delay in performance or failure to perform any obligation hereunder if, and to the extent that, such failure or delay is caused by an event of Force Majeure. Force Majeure shall mean any act, event or condition that is beyond the party's reasonable control, that materially and adversely affects the party's ability to perform its obligations hereunder, and that is not the result of the party's willful neglect, error, omission or failure to exercise reasonable due diligence.

22. Controlling Law. **THIS AGREEMENT CONTAINS IMPORTANT MATTERS AFFECTING LEGAL RIGHTS AND IS ACCEPTED AND ENTERED INTO IN FLORIDA AND ANY QUESTION REGARDING ITS VALIDITY,**

CONSTRUCTION, ENFORCEMENT, OR PERFORMANCE SHALL BE GOVERNED BY FLORIDA LAW. ANY LEGAL PROCEEDING ARISING FROM OR IN ANY WAY REGARDING THE AGREEMENT SHALL HAVE ITS VENUE LOCATED EXCLUSIVELY IN THE CIRCUIT COURT OF VOLUSIA COUNTY, FLORIDA, AND THE PARTIES HEREBY EXPRESSLY CONSENT AND SUBMIT THEMSELVES TO THE PERSONAL JURISDICTION AND VENUE OF THE COURT.

23. Additional Provisions. This Contract includes all additional provisions as may have been outlined in written quotes and purchase orders and any attachments or exhibits to this Contract whether delivered herewith or subsequently approved as a part hereof, such as drawings or technical specifications prepared in the performance of this work. In the event of a conflict between any attachments or exhibits to this Contract, and this Contract, the language of this Contract shall control.

24. Integration. This Contract and the documents incorporated herein by reference shall constitute the whole agreement between the parties. There are no promises, terms, conditions, or obligations other than those contained herein, and this Contract shall supersede all previous communications, representations, or agreements, written or verbal, between the parties hereto.

25. Notice. For purposes of this agreement, notices shall be sent as follows:

City:	City of Port Orange Attention: Interim/City Manager 1000 City Center Circle Port Orange, Florida 32129 (386) 506-5501
Copy to:	City of Port Orange Attention: Administrative Services Director 1000 City Center Circle Port Orange, Florida 32129 (386) 506-5560
Contractor:	<u>MERCER GROUP</u> <u>FLORIDA</u> Attention: <u>DONA</u> <u>HIGGINBOTHAM</u> <u>3245 S Atlantic Ave #607</u> <u>Daytona Beach Shores, FL</u> <u>32118</u>

Any notice or other communication given under the Contract will be in writing and delivered by hand, sent by facsimile (provided acknowledgement of receipt thereof is delivered to the sender), sent by certified, registered mail, or sent by any nationally recognized overnight courier service to the addresses provided herein. The parties may, from time to time and at any time, change their respective addresses and each will have the right to specify as its address any other address by at least 10 days written notice to the other party.

26. Contract Construction

This Agreement may be executed in one or more counterparts, each of which shall be deemed to be an original but all of which together shall constitute one and the same instrument. The delivery by facsimile or e-mail of an executed copy of this Agreement shall be deemed valid as if an original signature was delivered. No contract shall be formed between Contractor and the City until the City signs this Agreement.

27. Authority to Sign. Each person signing this Agreement warrants that he or she is duly authorized to do so and to bind the respective party to the Agreement.

[Remainder of this page intentionally left blank]

Witnesses:

Marcial Gomez
Printed Name: Marcial Gomez

Ropen Nalbandian
Printed Name: Ropen Nalbandian

[Redacted]

By: Dona Higginbotham
Printed Name: Dona Higginbotham
Title: Sr. Vice President

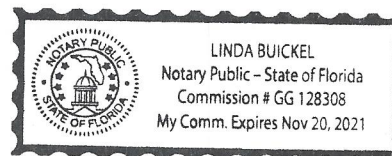
If this Contract is signed by an individual not identified as the President of the corporation in the records of the Florida Department of State, Division of Corporations, please provide written authorization for that individual to enter into contracts on behalf of the corporation.

Date: 09 December 2020

STATE OF Florida
COUNTY OF Volusia

The foregoing instrument was acknowledged before me by means of physical presence or online notarization, this 09th day of December, 2020, by Dona Higginbotham, as Sr. Vice President of Mercer Group Inc, a [Redacted]. He or she is personally known or produced [Redacted] as identification.

Linda Buickel
Notary Public, State of FLORIDA
Printed, typed or stamped name, commission and expiration:



Witnesses:

CITY OF PORT ORANGE

Printed Name: _____ By: _____
Donald O. Burnette, Mayor

Printed Name: _____ Date: _____

STATE OF FLORIDA
COUNTY OF VOLUSIA

The foregoing instrument was acknowledged before me by means of _____ physical presence or _____ online notarization, this _____ day of _____, 20____, by Donald O. Burnette, as Mayor the City of Port Orange, a Florida municipal corporation, on behalf of the city. He is _____ personally known or _____ produced _____ as identification.

Notary Public, State of Florida

Printed, typed or stamped name, commission and expiration:

Witnesses:

ATTEST:

Printed Name: _____ By: _____
Robin L. Fenwick, MMC, City Clerk

Printed Name: _____ Date: _____

STATE OF FLORIDA
COUNTY OF VOLUSIA

The foregoing instrument was acknowledged before me, by means of _____ physical presence or _____ online notarization, this _____ day of _____, 20____, by Robin L. Fenwick, as City Clerk of the City of Port Orange, a Florida municipal corporation, on behalf of the city. She is _____ personally known or _____ produced _____ as identification.

Notary Public, State of Florida

Printed, typed or stamped name, commission and expiration:



End of Solicitation Documents



CITY COUNCIL AGENDA ITEM

REQUESTED COUNCIL MEETING DATE 12/22/2020

Consent item: No

SUBJECT: (B6) Council Direction on Appointment of Interim City Manager Process

DEPARTMENT: Administrative Services

GOAL:

RECOMMENDED MOTION:

SUMMARY: The City's Assistant City Manager, Alan Rosen, was appointed as Interim City Manager by Council on November 17, 2020; however, Mr. Rosen has accepted a position as the County Manager for Lake County. Assuming his contract negotiations are successful and his contract is approved by the Lake County Commission on December 22, 2020, City Council will need to move forward with appointing another Interim City Manager.

Below are possible options:

- 1) Use a Interim Placement Firm: This process would be almost like completing a direct hire, but be aided by a firm who represents desirable candidates. It could be quicker than an external recruitment but slightly longer than a direct hire.
- 2) Complete a direct-to-hire from an external candidate (no recruitment process): Can be utilized if Council has an available external manager they know they would like to select. (See attached Manager in Transition List.)
- 3) Complete an external recruitment for an Interim Manager: Last time we had an Interim City Manager, an in-house recruitment was completed. The ad was posted on 07/21/2014 and the first date of employment for the interim Manager was 08/25/2014. This does not guarantee this current recruitment would be able to be completed in that same timeline, but serves as a reference. Attached is a draft posting that could be used for an external recruitment.

Please note, we have identified a very aggressive timeline for an external recruitment. This involves posting the vacancy on 12/23/2020 and taking applications until 01/07/2021. Applications would be provided to Council throughout the posting so they could review them regularly. Council would then shortlist who they want to interview through a Special Meeting on 1/12/2021. HR would then complete an initial media search of those candidates and interviews can be held during the day on 1/19/2021. After the interviews Council could make a selection, subject to successful background check. Assuming the selected candidate is immediately available and could find local housing, the hope would be they could be on board on 2/1/2021. This is a very aggressive timeline that does not account for any of the traditional slippage seen

with recruitment processes. The contract would also need to be negotiated and approved after the 01/19/2021 selection.

4) Assign an internal interim Manager: This would be the quickest route to find an interim manager, if an internal candidate is willing and desirable.

Project No.: Funding Account No.:

Presenter: Alan Rosen

ATTACHMENTS:

1.	Manager in Transition 20201216	Manager in Transition 20201216.PNG
2.	City of Port Orange Interim Ad Draft 20201216	City of Port Orange Interim Ad Draft 20201216.docx

Robin Fenwick	Created/Initiated - 12/16/2020
Jamie Miller	Approved - 12/16/2020
Matthew Jones	Approved - 12/17/2020
Alan Rosen	Approved - 12/17/2020
Robin Fenwick	Final Approval - 12/17/2020

Member-in-Transition Profiles

ett

District VIII

Former Manager of Frostproof

(850) 740-8575

00@gmail.com

Area of Expertise:

Investment analysis including 3rd party

Construction of financial foundations

Organizational design and development

Development and implementation

Design and management

Surveys

Descriptions and performance

As

Identification of personnel needs

Emergency Management – Disaster

Prevention, Response and Recovery

Improvement Project development

Management

Development of departmental designs,

Plans and responsibilities

Development costs and impact fees

Cost and fees analysis

Formation and Incorporation analysis

Applications for Request for Information,

Skills and Qualifications

Employee Benefit Programs, analysis and

Applications

Personal strengths:

Team building

Adoption of strong ethics in the

Organizational culture

Excellent communication in all forms,

Written, oral and presentations

Lawless

District VI

Former Manager of Islamorada

(850) 740-0020

lawless@yahoo.com

[Caryn Gardner-Young](mailto:Caryn.Gardner-Young)

District IV

Former Assistant Manager of Delray Beach

(561) 740-3286

caryngyoung@gmail.com

Jim Gleason

District III

Former Manager of Mascotte

(407) 790-0816

jgleason58@cfl.rr.com

Ted Lakey

District II

Former Manager of Taylor County

(850) 573-1412

Ted_lakey@yahoo.com

William F. Underwood II

District IV

Former Manager of Loxahatchee Groves

(772) 233-1511

umsg@att.net



City of Port Orange, Florida

Advertisement for Interim City Manager Position

The City of Port Orange, located on Florida's East Central Coast in Volusia County, is recruiting for an Interim City Manager to begin service as early as February 1, 2021 and lasting for a period of 3 to 6 months. The Interim City Manager will be responsible for administering daily city operations and implementing City Council directives. The City Manager is the direct liaison between city staff and elected officials.

Port Orange, with a population of over 62,000, covers an area of approximately 29 square miles and is a full service city that provides its own police, fire, emergency medical services, parks and recreational activities, streets and parks maintenance, water, wastewater and reclaimed water services, storm water improvements, community development, code enforcement, planning and zoning, forest management, wetland mitigation and general administration. The City has approximately 500 employees and an annual budget of \$121,999,168, with the General Fund totaling \$43,180,416. For additional information about the City of Port Orange, please visit the City's website at www.port-orange.org.

Qualifications: The Interim City Manager will be selected by the City Council based upon a review of experience, education, and management ability as it pertains to running a municipal government. There is no residency requirement for the Interim City Manager. The individual selected as Interim City Manager will be eligible to apply for the position of City Manager once recruitment for that position commences. Residency is a requirement for the position of City Manager.

How to Apply: To be eligible for consideration for the position of Interim City Manager, all interested candidates must apply online at (ENTER LINK). Applications will be received until January 7th, 2021 at 5 P.M. The City Council is anticipated to shortlist candidates on January 12, 2021 for interviews tentatively scheduled for January 19, 2021. For additional information, please contact the Administrative Services Department at 386-506-5560. Applicants are requested to submit a cover letter that indicates availability and desired salary.

Please note the State of Florida has a very broad Public Records law and applications received would be subject to disclosure in accordance with such.