



**PROPOSAL TO PROVIDE EXECUTIVE SEARCH SERVICES
FOR A CITY MANAGER FOR COCOA, FL**

Volume I: Proposal

Colin Baenziger & Associates

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PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES

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March 27, 2020

The Honorable Mayor Jake Williams, Jr., Deputy Mayor Alex Goins, and Councilmembers Don Boisvert, Lorraine Koss, and Brenda Warner
Attn: Tammy Gemmati, Administrative Services Director
The City of Cocoa
65 Stone Street
Cocoa, FL 32922

The Honorable Mayor Williams, Deputy Mayor Goins, and Councilmembers Boisvert, Koss, and Warner:

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

While CB&A is a nationwide municipal recruiting firm, our home base is Florida. In fact, we have been selected to perform 113 of the last 165 recruitments where a Florida city or county has chosen to use a recruiter to find its Manager / Administrator. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients and candidates. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a great fit for you and your community. As a result, we only take a few clients at a time and focus on completing the assignment in an exemplary manner. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and selection. We also offer one of the better warranties in the industry.

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

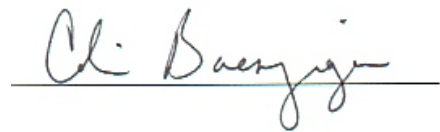
Some of our Florida searches include City Managers for Aventura, Cooper City, Dania Beach, Destin, Fort Myers, Fruitland Park, Gainesville, Hallandale Beach, Key Biscayne, Madeira Beach, Melbourne, Miramar, Mount Dora, Ocala, Orange City, Palm Beach Gardens, Palm Coast, St. Pete Beach, Stuart, Tavares, and Treasure Island, and West Melbourne. Nationally we have found City Managers for Ankeny, IA; Bellevue, WA; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also sought the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia), County Managers for Brevard County, FL; Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Polk County, IA; St. Lucie County, FL; St. Johns County, FL; and Union County, NC.

Some of our current searches include City Managers for Brighton, CO, Cape Coral, FL, Doraville, GA, Montverde, FL and Winchester, VA, a City Attorney for Lawton, OK, a Finance Director for Gainesville, FL, Public Works Administrator for Renton, WA, and a General Manager for the Des Moines (IA) Water Works.

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

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

Sincerely,



Colin Baenziger
Principal / Owner

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

I. Qualifications and Experience of the Firm

The Firm, Its Philosophy, & Its Experience

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

Colin Baenziger & Associates' outstanding reputation is derived from our commitment to the quality of our product and the timeliness of the delivery. Our work is not done until you are satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our fee or in our action plan. When we do so, we do not ask for more than the originally quoted price. Rather, we accept these situations as part of our cost of doing business. We are your experts and once a contract is signed we have an obligation to fulfill its requirements with excellence, on time, and within budget, regardless of the circumstances.

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

Technical Capabilities and Organizational Structure

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

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

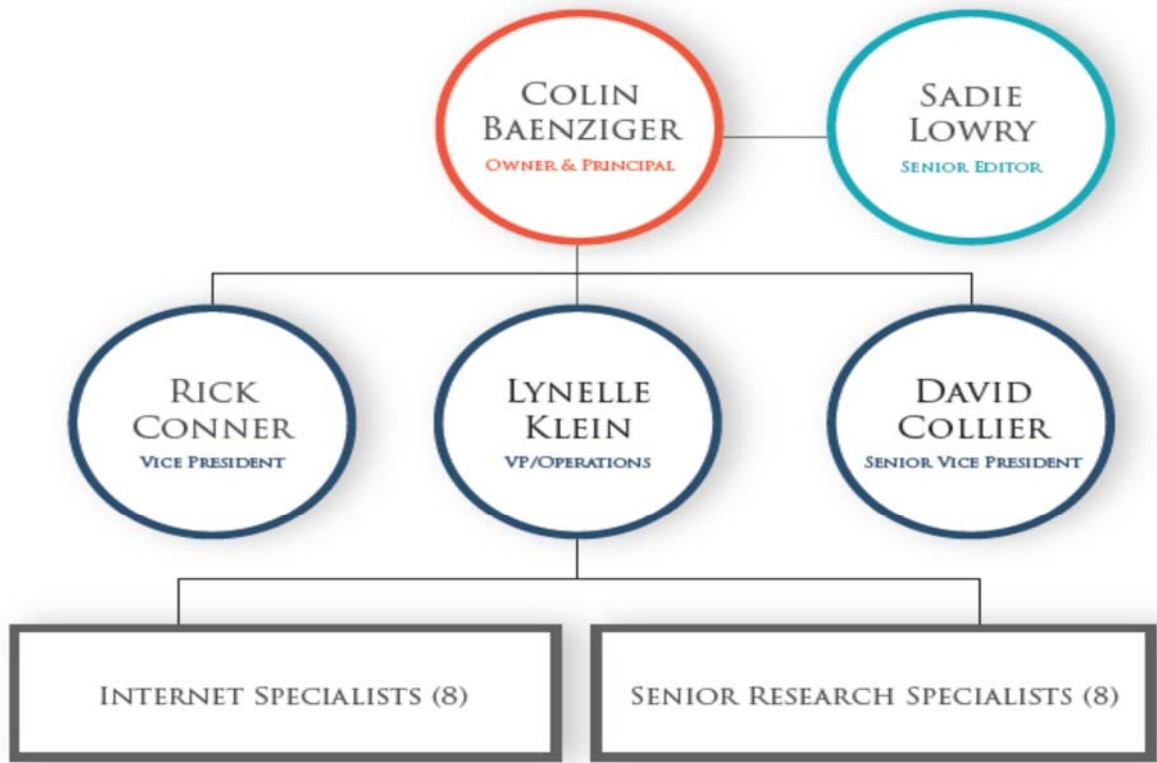
Completion of Projects within Budget

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

Completion of Projects on Schedule

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

I. Qualifications and Experience of the Firm (continued)



Diversity

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the City. The proof is that from the beginning of 2009, 29% of our placements have been females and/or minorities with the high in any given year being 47%.

Prior Names and Litigation

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

Insurance

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

I. Qualifications and Experience of the Firm *(continued)*

Overall Executive Search Experience

CB&A started its executive search business in 1998 from scratch. As a single father, he needed to stay nearby and so his goal was to become Florida's preeminent recruiter. In 2007 with his children mature, he branched out into other states. His firm has now worked in 32 states, from Maine to California and Florida to Alaska. See the map below.



A complete list of our searches can be supplied upon request.

I. Qualifications and Experience of the Firm (continued)

City / County Manager Searches for the past Five Years

2020 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Agency Size: Number of Employees
1	City Manager	Crescent City, FL	1,542	Michael Esposito	26

I. Qualifications and Experience of the Firm (continued)

2020 City / County Manager Searches Completed (continued)					
	Client	Contact Name	Title	Phone	Email
1	Crescent City, FL	Brett Peterson	Mayor	(386) 698-2525	mayor@crescentcity-fl.com

I. Qualifications and Experience of the Firm (continued)

2019 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Agency Size: Number of Employees
1	County Manager	Clay County, FL	212,230	Howard Wanamaker	614
2	City Manager	Clewiston, FL	7,943	Randy Martin	94 FT / 39 PT
3	City Manager	Deerfield Beach, FL	80,863	Dave Santucci	673
4	City Manager	Gainesville, FL	133,857	Lee Feldman	1,300
5	City Manager	Opa-locka, FL	16,426	John Pate	152
6	City Manager	Panama City Beach, FL	14,338	Tony O'Rourke	300 FT / 29 PT
7	City Manager	St. Pete Beach, FL	9,647	Alex Rey	139
8	City Manager	Sammamish, WA	64,548	Rick Rudometkin	101
9	City Manager	Vero Beach, FL	16,919	Monte Falls	209

I. Qualifications and Experience of the Firm (continued)

2019 City / County Manager Searches Completed (continued)					
	Client	Contact Name	Title	Phone	Email
1	Clay County, FL	Mike Cella	Commissioner	(904) 269-6394	mike.cella@claycountygov.com
2	Clewiston, FL	Mali Gardner	Mayor	(863) 983-1484	mali.gardner@clewiston-fl.gov
3	Deerfield Beach, FL	Bill Ganz	Mayor	(954) 816-1936	web.commission@Deerfield-Beach.com
4	Gainesville, FL	Lauren Poe	Mayor	352-334-5000	poelb@cityofgainesville.org
5	Opa-locka, FL	Matthew Pigatt	Mayor	(305) 953-2868	mpigatt@opalockafl.gov
6	Panama City Beach, FL	Mike Thomas	Mayor	(850) 233-5100	mthomas@pcb.gov
7	St. Pete Beach, FL	Alan Johnson	Mayor	(727) 543.2794	ajohnson@stpetebeach.org
8	Sammamish, WA	Ramiro Valderrama	Councilmember	(206) 247-4519	RValderrama-Aramayo@sammamish.us
9	Vero Beach, FL	Val Zudans	Mayor	(772) 978-4700	VZudans@covb.org

I. Qualifications and Experience of the Firm (continued)

2018 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Agency Size: Number of Employees
1	City Manager	Aventura, FL	37,724	Ronald Wasson	198
2	City Administrator	Dickinson, ND	22,186	Joseph Gaa	220
3	City Manager	Groveland, FL	12,493	Mike Hein	121
4	City Manager	Jacksonville Beach, FL	23,518	Mike Staffopoulos	343 FT / 134 PT
5	City Administrator	Lake Forest Park, WA	13,059	Phillip Hill	66
6	City Manager	Naples, FL	21,845	Charles Chapman	478.1
7	City Manager	North Topsail Beach, NC	734	Bryan Chadwick	34
8	City Manager	Sebastian, FL	24,772	Paul Carlisle	150
9	Township Manager	Spring Garden Township, FL	12,840	Marcy Krum-Tinsley	44
10	City Manager	Sunnyside, WA	16,407	Martin Casey	107

I. Qualifications and Experience of the Firm (continued)

2018 City / County Manager Searches Completed (continued)					
	Client	Contact Name	Title	Phone	Email
1	Aventura, FL	Enid Weisman	Mayor	(305) 466-8900	eweisman@cityofaventura.com
2	Dickinson, ND	Scott Decker	Mayor	(701) 483-8620	Scott_Decker@ndsupernet.com
3	Groveland, FL	Mike Radzik	Council Member/Vice Mayor	(352) 557-3066	Mike.Radzik@groveland-fl.gov
4	Jacksonville Beach, FL	Charlie Latham	Mayor	(904) 247-6100	CLatham@jaxbchfl.net
5	Lake Forest Park, WA	Jeff Johnson	Mayor	(206) 368-5440	jjohnson@ci.lake-forest-park.wa.us
6	Naples, FL	Bill Barnett	Mayor	(239) 213-1000	mayorbill@naplesgov.com
7	North Topsail Beach, NC	Daniel Tuman	Mayor	(910) 328-2424	ntopsail@gmail.com
8	Sebastian, FL	Jim Hill	Mayor	(727) 224-5246	jhill@cityofsebastian.org
9	Spring Garden Township, PA	Thomas Warman	President	(717) 848-2858	twarman@sgtwp.org
10	Sunnyside, WA	Julia Hart	Mayor	(509) 836-6305	jhart@sunnyside-wa.gov

I. Qualifications and Experience of the Firm (continued)

2017 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Agency Size: Number of Employees
1	City Manager	Auburn, AL	58,582	James Buston	788
2	City Manager	Aventura, FL	37,724	Susan Grant	182 FT / 16 PT
3	City Manager	Burien, WA	50,500	Brian Wilson	63 FT / 8 PT
4	City Manager	Carnation, WA	1,873	Amy Arrington	12
5	City Manager	Doraville, GA	10,896	Regina Williams-Gates	97 FT / 14 PT
6	City Manager	Fairborn, OH	33,452	Robert Anderson	250
7	City Manager	Parkland, FL	28,200	Robert Payton	80 FT / 74 PT
8	City Manager	Petersburg, VA	32,123	Aretha Ferrell	511
9	City Manager	Roanoke, VA	98,465	Bob Cowell	1,700
10	City Manager	Stuart, FL	16,462	David Ross	282
11	City Manager	Tacoma, WA	205,200	Elizabeth Pauli	2,100
12	City Manager	Treasure Island, FL	6,783	Garrison Brumback	99
13	City Manager	Winter Haven, FL	36,500	Michael Herr	486

I. Qualifications and Experience of the Firm (continued)

2017 City / County Manager Searches Completed (continued)					
	Client	Contact Name	Title	Phone	Email
1	Auburn, AL	Bill Ham	Mayor	(334) 559-8804	bham@auburnalabama.org
2	Aventura, FL	Enid Weisman	Mayor	(305) 466-8900	eweisman@cityofaventura.com
3	Burien, WA	Lucy Krakowiak	Mayor	(206) 244-1952	lucyk@burienwa.gov
4	Carnation, WA	Jim Berger	Mayor	(425) 333-4192	jim.berger@carnationwa.gov
5	Doraville, GA	Donna Pittman	Mayor	(770) 451-8745	donna.pittman@doravillega.us
6	Fairborn, OH	Dan Kirkpatrick	Mayor	(937) 673-4178	dan.kirkpatrick@ci.fairborn.oh.us
7	Parkland, FL	Christine Hunschofsky	Mayor	(954) 993-3009	chunschofsky@cityofparkland.org
8	Petersburg, VA	Samuel Parham	Mayor	(804) 586-5528	sparham@petersburg-va.org
9	Roanoke, VA	Sherman Lea	Mayor	(540) 853-2444	sherman.lea@roanokeva.gov
10	Stuart, FL	Troy McDonald	Mayor	(772) 288-5300	TMcdonald@ci.stuart.fl.us
11	Tacoma, WA	Marilyn Strickland	Mayor	(253) 468-2518	marilyn.strickland@cityoftacoma.org
12	Treasure Island, FL	Robert "Bob" Minning	Mayor	(727) 415-8883	rminning@mytreasureisland.org
13	Winter Haven, FL	Steven Hunnicutt	Mayor	(863) 289-9971	smhunnicutt@mywinterhaven.com

I. Qualifications and Experience of the Firm (continued)

2016 City / County Manager Searches Completed					
	Position	Client	Population	Placement	Agency Size: Number of Employees
1	City Manager	Cocoa Beach, FL	11,200	James McKnight	250
2	City Manager	Covington, VA	5,961	Richard Douglas	100
3	City Manager	Danville, VA	42,900	Ken Larking	1,100
4	Chief Administrator	El Paso, County, TX	827,700	Betsy Keller	480 under the Administrator
5	City Manager	Fort Myers, FL	70,918	Saeed Kazemi	944
6	City Administrator	Fort Smith, AR	87,350	Carl Geffkin	937
7	City Manager	Gainesville, FL	117,000	Anthony Lyons	1,300
8	City Manager	Mountlake Terrace	20,200	Scott Hugill	150
9	City Manager	Norwich, CT	40,500	John Salomone	430
10	City Manager	Orange City, FL	11,600	Dale Arrington	100
11	City Manager	Port St. Lucie, FL	178,590	Russ Blackburn	1,000
12	City Administrator	Prosser, WA	5,845	David Stockdale	50
13	City Manager	Savannah, GA	144,350	Roberto Hernandez	2,610
14	Township Manager	Springettsbury Township, PA	26,700	Benjamin Marchant	100

I. Qualifications and Experience of the Firm (continued)

2016 City / County Manager Searches Completed (continued)					
	Client	Contact Name	Title	Phone	Email
1	Cocoa Beach, FL	Laurie Kalaghchy	City Clerk	(321) 868-3235	lkalaghchy@cityofcocoabeach.com
2	Covington, VA	Thomas Sibold	Mayor	(540) 958-8983	tomsibold@yahoo.com
3	Danville, VA	Sherman Saunders	Mayor	(434) 489-8738	sherman.saunders@danvilleva.gov
4	El Paso County, TX	Carlos Leon	Commissioner	(915) 546-2014	mmejia@epcounty.com
5	Fort Myers, FL	Randall Henderson	Mayor	(239) 321-7020	gpack@cityftmyers.com
6	Fort Smith, AR	Sandy Sanders	Mayor	(479) 784-2204	Mayor@fortsmithar.gov
7	Gainesville, FL	Todd Chase	Council Member	(352) 514-0168	chasetn@cityofgainesville.org
8	Mountlake Terrace, WA	Rick Ryan	Mayor Pro Tem	(206) 940-0108	RRyan@ci.mlt.wa.us
9	Norwich, CT	Deberey Hinchey	Mayor	(860) 823-3743	DHinchey@cityofnorwich.org
10	Orange City, FL	Tom Laputka	Mayor	(386) 775-5403	tlaputka@ourorangecity.com
11	Port St. Lucie, FL	Greg Orevac	Mayor	(772) 342-6072	mayor@cityofpsl.com
12	Prosser, WA	Randy Taylor	Mayor	(509) 875-4367	RTaylor@ci.prosser.wa.us
13	Savannah, GA	Eddie DeLoach	Mayor	(912) 210-1722	edeloach@savannahga.gov
14	Springettsbury Township, PA	Mark Swomley	Board Chair	(717) 805-3093	mark.swomley@springettsbury.com

II. Proposed Work Plan

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

Phase I: Information Gathering and Needs Assessment

Task One: Needs Assessment

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

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

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

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

Task Two: Develop Position Description and Recruitment Materials

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

II. Proposed Work Plan (Continued)

Phase II: Recruitment

Task Three: Recruit Candidates

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

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

Phase III: Screening and Finalist Selection

Task Four: Evaluate the Candidates

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

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

II. Proposed Work Plan *(Continued)*

Specifically, our efforts will involve:

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

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

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

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

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

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

II. Proposed Work Plan (Continued)

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

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

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

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

Task Five: Preparation and Presentation of Candidate Materials

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

Task Six: Finalist Selection

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

Task Seven: Notify All Candidates of Their Status

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

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

II. Proposed Work Plan (Continued)

Phase IV: Coordinate the Interview Process and City Manager Selection

Task Eight: Coordinate the Candidate Assessment Process

Prior to the interviews, we will recommend an interview/assessment process for the City's review including means to evaluate the candidates' communication skills, interpersonal skills, and decision-making skills. As part of the process, we will recommend the City Council observe the finalists in a number of settings. We will also recommend you invite the finalists' spouses, so they can spend time in and evaluate your community.

Day #1: The finalists are given a tour of the community by a knowledgeable staff member or resident.

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

Day #2: Beginning at approximately 8:00 a.m., the Council as a group will interview each candidate one at a time for approximately an hour. Part of the interviews may include a PowerPoint presentation, so the Council can observe the candidates' presentational skills.

At approximately 1:30 p.m., each candidate will interview individually with each elected official for approximately 30 minutes. These meetings provide the Council Members with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, Managers succeed and fail based on their interaction with the Council and the one-on-one interviews are an excellent way to test that interaction.

Task Nine: Debriefing and Selection

After the interviews are completed, we have developed a simple methodology that moves the elected body quickly and rationally to the desired outcome.

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

II. Proposed Work Plan (Continued)

Phase V: Negotiation and Continuing Assistance

Task Ten: Notification, Contract Negotiations and Warranty

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

Task Eleven: Continuing Assistance

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

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

The City's Obligations

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

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

II. Proposed Work Plan (Continued)

Proposed Project Schedule

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

Phase I: Needs Assessment / Information Gathering

- April 6th: CB&A begins meeting with the Council Members and, if suggested, other stake holders to understand the job and its challenges.
- April 13th: CB&A submits the draft of the full recruitment profile to the City for its review.
- April 17th: City provides comments on the recruitment profile.

Phase II: Recruiting

- April 21th: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 13,700 local government professionals.
- May 15th: Closing date for submission of applications.
- May 20th: CB&A reports on the results of the recruitment.

Phase III: Screening, Reference Checks and Credential Verification

- June 9th: CB&A forwards its reports and materials to the City for the recommended candidates. These will include the candidates' resumes and introduction as well as the results of our reference, background and Internet/newspaper archives checks.
- June 15th: City selects / confirms the finalists for interviews.

Phase IV: Interview Process Coordination and City Manager Selection

- June 25th: City holds reception for the finalists.
- June 26th: One-on-one and full Council interviews and decision.

Phase V: Negotiation, Warranty & Continuing Assistance

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

Some of CB&A Clients...



Village of Estero, FL

Village Manager



City of Groveland, FL

***City Manager
Human Resource Director***



Village of North Palm Beach, FL

Village Manager



City of Sebastian, FL

City Manager

III. Proposed Project Team

Project Team and Involvement

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

Rick Conner, senior vice president, will be the Deputy Project Manager and support for Mr. Baenziger. Mr. Conner will assist in virtually every aspect of the search effort but will focus on the search for strong candidates and candidate evaluation. Before joining CB&A he had over 30 years of experience as a senior level local government manager in several states and in that capacity hired many key staff. He has over 30 years of in local government and in executive recruiting. He earned Bachelor of Science Degrees in Business Administration and Engineering from the University of Missouri. In his spare time, he invents scuba diving equipment and accessories.

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

CB&A will involve its team of 10 experienced research assistants to interview references and conduct checks of newspapers, social media and the internet.

III. Proposed Project Team *(continued)*

Colin Baenziger, M.P.A.

Principal

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



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

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

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

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

III. Proposed Project Team *(continued)*

Rick Conner, P.E.

Vice President

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



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

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

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

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

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

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

III. Proposed Project Team *(continued)*

Lynelle Klein

Vice President for Operations

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



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

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

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

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

IV. References

City Manager, City of Cooper City, FL (population 32,000)

Contact: Former Mayor Debby Eisinger at (954) 434-4300, or mayordebby@gmail.com
Former Council Member Neil de Jesus at (954) 558-4734 or NealDJ@bellsouth.net

CB&A began work in May 2008, to assist the city in finding its next **Manager**. Our work included scouring the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, recommending finalists for the city to interview and helping with the contract negotiations. *Bruce Loucks, formerly County Administrator for Charlotte County, Florida*, was selected in early August, 2008, and remained with the City until November 2018 when he retired.



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

Contact: Mayor Charles Latham at (904) 910-4004 or CLatham@jaxbchfl.net

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



Village Manager, Pinecrest, FL (population 19,400)

Contact: Former Mayor Cindy Lerner at (305) 992-3433, of mayorlerner@gmail.com
City Clerk Guido Inganzo at (305) 234-2121, or clerk@pinecrest-fl.gov

In late April 2011, CB&A was hired to assist Pinecrest in finding its next Village Manager. We worked with a Citizen's Advisory Committee and sought out candidates from around the nation while, due to the Council's desire, focusing on candidates from Florida. The process included a public reception which was extremely well received by the elected officials and the public. Interviews were held on July 17th and 18th with *Ms. Yocelyn Galiano Gomez* being selected as the Village Manager on the 18th. Ms. Gomez was an internal candidate and the Assistant Village Manager. Ms. Gomez remains with the City.



IV. References (continued)

City Manager, Satellite Beach, FL (population 10,100)

Contact: Mayor Frank Catino at (321) 223-7700, or
fcatino@satellitebeach.org

Satellite Beach retained CB&A just after Christmas, 2012 to help find its next **City Manager**. We began work immediately by meeting with the Council Members and based on what we learned, we crafted a recruitment profile. We searched the country for outstanding candidates. Background checks were thorough and four finalists were selected. Interviews were held on March 15th and 16th and *Courtney Barker, formerly Executive Director of the Planning and Growth Management Department for Titusville, FL*, was selected on the March 21st. Ms. Barker remains with the City.



City Manager, Sebastian, FL (population 27,772)

Contact: Mayor Jim Hill at (727) 224-5246 or
jhill@cityofsebastian.org

CB&A was hired in mid- January to find Sebastian's next **City Manager**. We were asked to identify someone with strong leadership capabilities and, ideally, with Florida experience. Our efforts involved searching the country for strong candidates, conducting extensive background checks, recommending a strong field of candidates, overseeing the interviews and providing a small amount of assistance with the contract negotiations. *Paul Carlisle, then County Manager of Glades County, FL*, was selected on April 5th, 2018. Mr. Carlisle remains with the City.



City Manager, Seminole, FL (17,800)

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

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



IV. References (continued)

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

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

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



City Manager, Winchester, VA (population 16,000)

Contact: Councilor John Willingham at (540) 931-4655, or
John.Willingham@WinchesterVA.gov

CB&A was hired in mid-March 2014 to find Winchester's next **City Manager**. The City was seeking someone with energy and enthusiasm to move the City forward. We accepted the challenge and searched the nation for just the right person. Our efforts included extensive outreach and we an excellent group of high quality candidates. We then performed background checks, coordinated the interview process, and assisted the Town in selecting Eden Freeman, *formerly Assistant City Manager for Sandy Springs, GA*, in early June. Ms. Freeman resigned in 2020 to become the Deputy City Manager for Greenville, SC.



City Manager, City of Winter Haven, FL (population 36,500)

Contact: Mayor Brad Dantzler at (863) 289-9947, or
bdantzler@mywinterhaven.com

CB&A was hired in mid-October, 2016, to find Winter Haven's next **City Manager**. We started our work in late October, and conducted a nationwide search. We recommended eight candidates to the City. One dropped out at the last minutes and three finalists were interviewed on January 6, 2017. While it rarely happens, the City was unable to agree on a candidate and we conducted a second search which concluded with *Mike Herr, then City Manager of Plant City*, being selected in late April, 2017. Mr. Herr remains with the City.



IV. References (continued)

Candidate References

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

Placement	Formerly	Recruited To Be	Contact at
Dale Martin	City Manager Winchester, CT	City Manager Fernandina Beach, FL Appointed September 2015	(904) 557-5047 dmartin@fbfl.org
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June, 2014	(540) 667-1815 citymanager@ winchesterva.gov
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014 Hired as the County Executive for Fairfax County, VA in January 2018	(843) 368-7458
John Salomone	Town Manager Newington, CT	City Manager Norwich, CT Appointed January 2016	(860) 539-8906 cmoffice@cityofnorwich.org
Tony O'Rourke	City Manager, Canon City, CO	City Manager Panama City Beach, FL Appointed December 2019	(719) 792-9515

V. Fee and Warranty

Fee

CB&A offers a firm, fixed price of \$26,500, which includes all expenses, except the costs associated with bringing the finalists to interview with the City (travel, meals, hotel etc.). Bills will be rendered as the search progresses and due at the end of each Phase as indicated below:

We will bill the fee as the phases are completed and according to the following schedule:

Requested Services – City Manager	
Phase I: Needs Analysis / Information Gathering	\$ 3,000
Phase II: Recruiting	11,000
Phase III: Screening	10,000
Phase IV: Interview Process Coordination and Manager Selection	1,500
Phase V: Negotiation and Continuing Assistance	1,000
Firm, Fixed Fee Total*	\$26,500

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

Warranty

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

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