

***Proposal for Executive Search Services***

Village Manager  
Village of Estero, Florida  
Village Manager Recruitment Services RFP 2015-01

June 2015

Strategic Government Resources

Ron Holifield, CEO  
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214-676-1691

[Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)





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June 22, 2015

Village of Estero  
21500 Three Oaks Parkway  
Estero, Florida 33928

Re: Village of Estero, Florida  
Village Manager Recruitment Services  
RFP 2015-01

Dear Honorable Mayor Batos and Council Members:

Thank you for the opportunity to submit this full service proposal to assist the Village of Estero in your search for a new Village Manager.

SGR is one of the top three local government executive search firms in the nation and has the unique ability to provide a personalized and comprehensive search service to meet your needs.

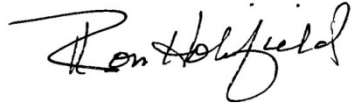
I would like to draw your attention to a few key items that distinguish SGR from other search firms:

- SGR has over 75,000 email subscribers to my weekly “10 in 10 Update on Leadership and Innovation” e-newsletter.
- SGR will also send targeted emails to our database of over 4,500 city management officials.
- SGR’s website, where this position would be posted, receives over 23,000 local government official visitors each month, with over 210,000 page hits per month – more than any other local government search firm website in the nation.
- SGR’s job board (a separate website), where this position would also be posted, is the 2<sup>nd</sup> largest local government job board in the nation, with over 16,000 local government job seeker visitors each month, and over 1,200 jobs listed at any given time.
- SGR is the only search firm with social media experts on staff, which provides a comprehensive social media marketing campaign that includes email, Facebook, Twitter, and LinkedIn.

The simple fact is that no other firm can touch our reputation for being trusted by both clients and candidates, and for successful long term placements.

We are truly excited about the prospect of doing this search for the Village of Estero. I look forward to discussing in more detail how we can help you select an exceptional Village Manager and am available to visit in person with you at your convenience.

Respectfully submitted,

A handwritten signature in black ink that reads "Ron Holifield". The signature is written in a cursive style with a large, stylized initial "R".

Ron Holifield  
Chief Executive Officer  
SGR Executive Search  
[Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)  
214-676-1691

## Contact Information

### Contact Information for Binding Official / Primary Contact

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Cyndy Brown, Managing Director of Recruitment & Administration  
Strategic Government Resources

Address: P.O. Box 1642, Keller, TX 76244  
Cell: 817-919-4778  
Office: 817-337-8581  
Fax: 817-796-1228  
Email: [CyndyBrown@GovernmentResource.com](mailto:CyndyBrown@GovernmentResource.com)  
Website: [www.governmentresource.com](http://www.governmentresource.com)

### Alternate Contact

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Ron Holifield, CEO  
Strategic Government Resources

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





## Company Profile

### Background

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

### Mission & Core Values

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

SGR's core values are: Customer Service; Integrity; Philanthropy; Continuous Improvement; Flexibility; The Golden Rule; Collaboration; and, Protecting Relationships.

### Office Locations

SGR's corporate headquarters is in the Dallas/Fort Worth Metro area in Keller, Texas. SGR also has regional offices in:

#### **Texas**

Abilene  
Cleburne  
College Station  
Coppell  
Dallas  
Graham  
Greenville  
Murchison  
New Braunfels  
Seabrook  
Sugar Land

#### **Florida**

Kissimmee  
Sarasota

#### **Louisiana**

Baton Rouge

#### **Oklahoma**

Edmond  
Stillwater

### Executive Search Team

- Ron Holifield, Chief Executive Officer
- Cyndy Brown, Managing Director of Recruitment & Administration
- Melissa Valentine, Director of Executive Search Operations
- Lori Philyaw, Director of Interim Management Services
- Cindy Hanna, Executive Search Manager
- Katie Corder, Executive Search Manager
- Abi Compton, Executive Search Coordinator
- Muriel Call, Research Coordinator

**Executive Search Team (continued)**

- Bill Peterson, Senior Vice President, Executive Search
- Chester Nolen, Senior Vice President, Executive Search
- Gary Holland, Senior Vice President, Executive Search
- Marlin Price, Senior Vice President, Executive Search
- Mike Tanner, Senior Vice President, Executive Search
- Molly Deckert, Senior Vice President, Executive Search
- Ron Robinson, Senior Vice President, Executive Search
- Tommy Ingram, Senior Vice President, Executive Search

## Unique Qualifications

### Marketing and Networking

- SGR's 10 in 10 Update on Leadership and Innovation e-newsletter, where all executive searches conducted by SGR are announced, reaches over 75,000 subscribers.
- SGR has a database of over 4,500 city management professionals.
- SGR has formal collaborative partnerships with Maryland Municipal League, Ohio City/County Management Association, Missouri Municipal League, Oklahoma Municipal League, National Public Employers Labor Relations Association, Emerging Leaders in Local Government, City Management Association of Oklahoma, and Texas Fire Chiefs Association.
- SGR trains approximately 800 local government employees each month in live training classes.
- SGR has almost 300 local government clients in 47 states for our recruitment, training, and leadership development business lines combined.

Each executive recruiter has many years of experience in local government and a national network of relationships. The entire executive search group works as a team to leverage their networks to assist with each search. SGR team members are active on a national basis, in both local government organization and professional associations. Many SGR team members frequently speak and write on issues of interest to local government executives. Only SGR can work all of the relevant networks as a peer and insider, resulting in better recruitment, better investigation, better intelligence, better information, and better final decisions.

### Comprehensive Needs Assessment

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

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

### Accessibility

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

### Responsive to You

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

### **Trust of Candidates**

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

### **Listening to Your Unique Needs**

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

### **Recorded Online Interviews with Candidates**

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

### **Comprehensive Media Reports**

One of the worst things that can happen for your organization is to be surprised by undisclosed information about a finalist, especially if the surprise comes in the form of a newspaper article that is found by your critics. SGR has never had a client embarrassed by surprises about a candidate. SGR produces a comprehensive media search report on each finalist candidate. Each Media Report is compiled from information gathered using our proprietary online search process. This is not an automated process, and produces far superior results than a standard Google search which is typically utilized by other search firms. The report length may be as long as 350 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. No other firm provides such comprehensive media reports.

### **Comprehensive Background Investigation Reports**

SGR provides the most comprehensive background investigations in the industry, and we are the only search firm to use a licensed private investigation firm for these services.

### **Psychometric Assessments**

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

### **Recruitment Videos**

SGR offers the option of developing a custom video recruitment ad for posting on YouTube and linking to the video in other media sources. A sample SGR recruitment video for the City of Owasso, Oklahoma, can be viewed at <http://bit.ly/OwassoOKCM>.

### **Equal Opportunity Commitment**

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

### **Value**

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

### **Emerging Leaders**

SGR has a unique and unparalleled reputation of engaging and mentoring emerging leaders and young professionals. We will utilize our frequent personal interaction with emerging leaders, as well as our entire team's social media networks, to market this position and to identify potential applicants.

### **Five Way Guarantee**

SGR provides the strongest guarantee in the industry.

1. Our price is our price. You will never be charged an additional fee because we need to come to another meeting or spend extra time.
2. You always have 24/7 cell phone and email access to the executive recruiter and SGR's CEO.
3. If you do not find the right candidate, we will start the process over with no additional professional fees.
4. If we place a candidate who stays less than two years, we will conduct the search again at for no additional professional fees.
5. If we place a candidate with you, we will not directly solicit them for another job.



## **Key Personnel for this Project**

### **Ron Holifield, CEO**

Ron Holifield is the Founder and CEO of SGR. He previously served as Assistant City Manager in Plano, Texas as well as City Manager in Garland, DeSoto, Farmersville and Sundown, and on the City Manager's staff in Lubbock.

In 1996, he left city management and purchased Government Relations Specialists which he grew into the 49th largest lobby firm in Texas, before selling it to an employee. In 1999, Ron founded Strategic Government Resources to specialize in facilitating collaboration among local governments, with a particular emphasis in employee training and development of next generation leaders.

He has grown SGR into the largest private sector training company that specializes in leadership, management and customer service for local governments in the nation. He is a frequent speaker at state and national conferences and remains high profile in the city management profession.

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





**Ron Holifield**  
**Resume – July 2014**

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

**PROFESSIONAL HISTORY**

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

- Owner and CEO of this strategic management firm, helping local governments Recruit, Assess and Develop Innovative, Collaborative and Authentic Leaders. Clients have include over 350 local governments.
- SGR is the largest provider of live and online training in the nation designed specifically for local government, training over 1,000 local government employees every month in 41 states.
- Interviewed and/or quoted by numerous news publications and media outlets including: National Public Radio, Entrepreneur Magazine, Texas City Manager Magazine, Texas Town and City, Government Technology Magazine, GovWire Online Magazine, Federal Computer Week Magazine, CIO Magazine, Dallas Morning News, Dallas Business Journal, Plano Star Courier, DFW Tech Biz, Today Newspapers, Focus on the News, D Magazine, International Association of Chiefs of Police Journal, WOAI TV and KRLD and KTET Radio, as well as the ABC and NBC affiliates in Tulsa and WAMU radio in Washington, DC.

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

- Owner and CEO of this 20 year old governmental consulting firm which represented businesses doing business with government and in legislative advocacy efforts.
- Doubled it in size, becoming the 49<sup>th</sup> largest lobby firm in Texas, and then sold it to an employee to focus all efforts on the launch of SGR.
- Major clients included over 40 Fortune 500 firms including American Express, Aramark, Automated Licensing Systems, Children's Comprehensive Services, IBM, Quorum Health Group, Library Systems and Services, PeopleSoft, SCT, Space Imaging, TXI, Verizon, Xerox and many others.

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

- City Manager of this highly diverse suburban community.
- Hired to lead a rapid cultural change at City Hall, into a City known for being aggressively customer service driven, highly successful in the economic development arena, and operating in a very cost effective manner.
- Significant accomplishments include:
  - Named by Texas Business Magazine as a top 20 Texas city to relocate a business.
  - Named by Texas Outlook Magazine as a top 25 city for economic development.
  - Named by Texas Business Magazine as one of the “Best Run Cities in Texas.”
  - Increase in commercial building permits in excess of 1,000% over previous year.
  - Lowest crime rate of any major city in the Dallas-Fort Worth Metroplex.

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

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

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

- Served in a variety of capacities in this rapidly growing, premier city, including: Assistant City Manager of Community Services, Assistant City Manager of Administration, Acting Assistant City Manager for Development, and Assistant to the City Manager.
- Significant accomplishments while with Plano include:
  - Designed a program that doubled mid- and upper-level management minority and female representation in four years.
  - Designed a Disadvantaged Business Purchasing Program that dramatically increased minority business contracts without quotas.
  - Served as Project Manager for a \$19.5 million Civic Center Project, bringing it in \$2 million under budget.
  - Assisted in negotiating details of the JC Penney headquarters relocation from New York City to Plano.

- Created Plano's first Convention/Visitor's Bureau that exceeded year six sales and bookings projections in the first year.
- Initiated Plano's first Neighborhood Integrity Program.
- Creatively designed construction projects for EDS and JC Penney to achieve a \$750,000 sales tax windfall for the city.
- Designed an Employee Wellness Program which resulted in participant health care costs equaling only one-third those of non-participants.

**City of Farmersville, Texas – City Manager**

**1984 to 1986**

- First City Manager of this full service city, which operates an electric distribution system and two city lakes.

**City of Sundown, Texas – City Manager**

**1982 to 1984**

- City Manager of this full service city, which operates a natural gas distribution system and a municipal golf course.

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

**1981 to 1982**

- Administrative Intern to the City Manager of this major city, which operates a municipally owned electric utility.

**EDUCATION**

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

**MAJOR AWARDS for Municipal Organizations Managed**

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- 3CMA Economic Development Marketing Campaign Savvy Award Certificate of Excellence for International Development and Local Realtor Ads - Garland
- International Association of Chiefs of Police, Excellence in Policing Award for Neighborhood Service Team - Garland
- Finalist, Governor's Environmental Excellence Award - Garland
- Texas Natural Resource Conservation Commission Award for Excellence - Garland
- American Society of Landscape Architects, Texas Chapter, Environmental Stewardship Award for Garland's Spring Creek Forest Preserve - Garland

- Dallas Business Journal, “Metroplex Real Estate Deal of the Year (Existing Building),” – Garland
- Dallas Business Journal “Metroplex Real Estate Deal of the Year (New Construction),” - Garland
- GFOA Award for Distinguished Budget Presentation, every year, 1987-1996
- GFOA Certificate of Achievement for Excellence in Financial Reporting, 1987-1991

### **CURRENT PROFESSIONAL PARTICIPATION**

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- ICMA Task Force on Inclusiveness
- National Institute for Governmental Purchasing Talent Management Council
- Missouri Municipal League Governance Institute Fellow
- Member, Texas Fire Chief’s Association Best Practices Recognition Board
- Author, “the 16%” weekly blog, 2013-present
- Author, “Fourth Dimension Leadership”, 2010
- Member, International City/County Management Association (ICMA), 1982-present
- Member, Texas City Management Association (TCMA), 1982-present
- Member, Texas Municipal Human Resources Association, 2006 - present
- Member, Governmental Finance Officers Association, 2010 - present

### **PREVIOUS PROFESSIONAL PARTICIPATION**

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

**SPEAKING ENGAGEMENTS**

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- National Forum for Black Public Administrators DFW Chapter Conference, 2014
- Public Purchasing Association of North Texas, 2014
- Missouri Intergovernmental Risk Association Annual Conference, 2014
- Texas City Management Association Annual Conference, 2014
- American Public Works Association Midwest Annual Conference, 2014
- Governmental Finance Officers Association Annual Conference, 2014
- National Public Employers Labor Relations Association Annual Conference, 2014
- North Texas Municipal Clerks Association, 2014
- National Institute for Governmental Purchasing Lone Star Conference, 2014
- Missouri Municipal Clerks and Finance Officers Association Annual Conference, 2014
- South Texas City Manager's Association 2014
- Urban Counties Annual Conference, 2014
- SGR Annual Conference on Creating a Learning Organization, 2014
- National Public Employers Labor Relations Association Annual Conference, 2013
- National Parks and Recreation Annual Conference 2013
- Missouri Municipal League Annual Conference, 2013
- Washington City/County Management Association Annual Conference, 2013
- Nebraska City/County Management Association Annual Conference, 2013
- Tennessee Municipal League Annual Conference, 2013
- Texas City Manager's Association Annual Conference, 2013
- Government Finance Officers Association of Texas Annual Conference, 2013
- American Public Works Association Regional Conference, 2013
- Kansas Public Works Association Annual Conference, 2013
- Texas Recreation and Parks Association Annual Conference, 2013
- Texas Public Purchasing Association Annual Conference, 2013
- Colorado City County Management Association Annual Conference, 2013
- Kansas City County Management Association Annual Conference, 2012
- National Parks and Recreation Management School, 2012
- Texas City Management Study Group, 2012
- International City County Management Association Annual Conference, 2012
- National Procurement Institute, 2012
- Missouri Municipal League Annual Conference, 2012
- Texas City Clerk's Association Annual School, 2012
- Texas County Clerk's Association Annual School, 2012
- Kansas Governmental Finance Officers Association Annual Conference, 2011
- Texas City Management Association Annual Conference, 2010
- Public Risk Management Assoc. Annual Conference, 2010
- Oklahoma City Manager's Association Annual Conference, 2010
- Northwest States City Management Association Annual Conference, 2010
- Ohio City/County Management Assoc. Annual Conference, 2009
- West Texas City Management Association Annual Training Conference, 2009

- Texas Municipal League Regional Meeting, 2009
- Texas Municipal Human Resources Association Annual Nuts and Bolts Conference, 2009
- East Texas City Management Association Annual Training Conference, 2008
- East Texas City Management Association Annual Training Conference, 2007
- International City/County Management Association Conference, 2006
- Certified Public Manager Program, 2006
- North Texas Municipal Clerks Association Management Institute, 2006
- City of Carrollton, Texas, Leadership Academy, 2006
- City of Arlington, Texas, Leadership Academy, 2005
- Urban Management Assistants of North Texas Annual One Day Conference, 2005
- Leadership Southwest, 2004, 2006, 2008
- International City/County Management Association Annual Conference, 2003
- Keynote Speaker (along with the Deputy Secretary of Defense), Government Electronics and Information Technology Association Information Technology and Defense Electronics Forecast Annual Conference – State and Local Homeland Security, 2002
- Transforming Local Government Conference, 2001
- National Association of Counties Annual Conference, 1999
- World Services Congress – Building Public Private Partnerships, 1999
- Central Texas City Management Association, 1999
- Carolinas-Virginia Hospital Trustee/Physician Conference, 1999
- Quorum Ohio CEO Conference, 1999
- Chairman of the Board In-Service Training, Quorum, 1999
- Quorum Foundations for the Future, 1999
- Quorum Chairman of the Board Training, 1998
- International City County Management Association, 1998
- Iowa Municipal Management Institute, 1997
- Quorum Foundations for the Future, 1997
- Quorum Board of Trustees Training, 1997
- Urban Management Assistants of North Texas, Conference of Minority Public Administrators, and National Forum for Black Public Administrators Workshop – 1996
- Innovation Groups Regional Conference, 1996
- Texas City Management Association Annual Conference, 1996
- Florida City/County Management Assoc. Annual Conference, 1996
- North Carolina City/County Management Association Annual Conference, 1996
- Quorum Foundations for the Future, 1996
- International City/County Management Association Conference, 1996
- Texas City Management Association Conference, 1995
- Kansas Innovation Groups Regional Workshop, 1995
- City-County Communications & Marketing Association National Conference, 1994
- National League of Cities Innovations in Government National Conference, 1994
- Innovation Groups Regional Workshop, 1994
- Texas Foundation for the Improvement of Local Government Institute, 1994

**OTHER HONORS AND ACTIVITIES**

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





# Project Methodology

SGR provides a comprehensive scope of executive search services, and each executive search service contract is tailored to meet the client's specific needs. However, a full service executive search typically entails the following:

- 1. Organizational Inquiry and Analysis**
  - Outline Project Plan and Timeline
  - Individual Interviews with Search Committee/ Key Personnel/ Community Leaders (if desired)
  - Development of Position Profile and Professional Production of Brochure
  
- 2. Advertising and Recruitment**
  - Ad Placement
  - Recruitment Video (optional)
  - Social Media and Marketing of Position
  - Ongoing Communication with Applicants and Prospects
  
- 3. Initial Screening and Review**
  - Management of Applications
  - Evaluation and Triage of Resumes
  - Search Committee Briefing to Facilitate Selection of Semifinalists
  
- 4. Evaluation of Semifinalist Candidates**
  - Personal Interaction with Semifinalist Candidates
  - Written Questionnaire
  - Recorded Online Interviews
  - Media Search Stage 1
  - Semifinalist Briefing Books
  - Search Committee Briefing to Select Finalists
  
- 5. Evaluation of Finalist Candidates**
  - Comprehensive Media Search Stage 2
  - Comprehensive Background Investigation Report
  - DiSC Management Assessment
  - I-OPT Assessment
  - Finalist Briefing Books
  - Press Release (if desired)
  - Stakeholder Engagement (if desired)
  
- 6. Interview Process**
  - First Year Game Plan (if desired)
  - Assessment Exercise
  - Conduct Interviews
  - Deliberations
  - Reference Checks
  
- 7. Negotiations and Hiring Process**
  - Determine the Terms of an Offer
  - Negotiate Terms and Conditions of Employment
  - Transition Strategy
  
- 8. Post-Hire Team Building Workshop (supplemental service, if desired)**
  - I-OPT Team Building Workshop

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

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In the Organizational Inquiry and Analysis Stage, SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your particular needs.

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

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

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

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

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

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

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

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

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

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

SGR's preferred strategy is to rely on email distribution of the Position Profile brochure to key opinion leaders and potential prospects across the country. The position will be announced in our "10 in 10" e-newsletter, which reaches over 75,000 local government professionals, in

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

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

### **Recruitment Video**

SGR offers the option of developing a custom video recruitment ad, which can be posted on YouTube and linked to other media sources. It is estimated that job postings with video icons are viewed 12 percent more than traditional job postings, and that the job application rate increases by an average of 34 percent when video is added. A sample SGR recruitment video for the City of Plano, Texas, can be viewed at: <http://bit.ly/OwassoOKCM>.

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

SGR communicates with all applicants on a frequent and ongoing basis to ensure applicants stay enthusiastic about the opportunity. Outstanding prospects often will not submit a resume until they have done considerable homework on the available position. A significant number of inquiries will be made, and it is essential that the executive search firm be prepared to answer those questions with fast, accurate, and complete information, and in a warm and personal manner. This is one of the first places a prospective candidate will develop an impression about organization, and it is an area in which SGR excels. SGR also utilizes Google Alerts for each client organization and provide updates to our Executive Recruiters and applicants of any references made regarding the client organization in various media outlets.

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

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

#### **Management of Applications**

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personal responses to any questions or inquiries.

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

SGR uses a triage process to identify high probability, medium probability, and low probability candidates. The triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues regarding previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process described above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to

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

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

At this briefing, SGR will provide a comprehensive progress report via PowerPoint presentation and will facilitate the selection of approximately 10-12 semifinalists. The presentation will include summary information on the process so far, the candidate pool overall, and any trends or issues that have arisen, as well as a briefing on each candidate and their credentials. No other firm offers this level of reporting detail and transparency.

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

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

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

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

#### **Written Questionnaire**

SGR will ask semifinalist candidates to complete a comprehensive written exercise designed to provide greater insight into candidate thought processes and communication styles. SGR's written instrument is custom-designed around the priorities identified by the Search Committee and usually includes about 20 questions focusing on 5-6 key areas of particular interest to the client. This written instrument will be included with the semifinalist briefing book with the cover letters and resumes.

#### **Recorded Online Interviews**

SGR offers recorded online videos of candidates answering pre-recorded questions. This provides a very insightful, efficient and cost effective way to gain additional insights to utilize in selecting finalists you want to come in for live interviews. The online interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Online interviews also convey to candidates that the organization is using leading edge technology in its business processes and provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest. Online interviews are emailed to the Search Committee for viewing prior to selection of finalist candidates.

### **Media Search Stage 1**

Stage 1 of our media search involves a comprehensive review of all newspaper articles on the candidate in major news outlets within the previous two years. These media reports at the semifinalist stage have proven helpful by uncovering issues that were not previously disclosed by prospective candidates. The Executive Recruiter will communicate any “red flags” to the Search Committee immediately upon discovery.

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

Prior to this briefing, SGR will provide each member of the Search Committee with a briefing book on the semifinalist candidates. The briefing book will include written questionnaires, online interviews, and any additional information obtained about the candidate. The purpose of this briefing is to facilitate narrowing the list to 4-6 finalists who will be invited for personal interviews.

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

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

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

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

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

### **Comprehensive Background Investigation Reports**

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

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report
- Federal criminal search
- National criminal search
- County wants and warrants

- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)
- County criminal search (for every county in which candidate has lived or worked)
- County civil search (for every county in which the candidate has lived or worked)
- Education verification

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

### **Assessments (DiSC and I-OPT)**

It is critical for you to know as much as you can about your new executive before hiring him/her. Historically, employers have depended upon resumes, references, and interviews as sources of information for making hiring decisions. In practice, these sources have often proved inadequate for consistently selecting successful employees. The use of assessments has become essential for employers who want to place the right people in the right positions.

SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management Profile analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager.

The I-OPT Assessment is a tool that measure how a person perceives and processes information. How someone perceives and processes information has a profound impact on what motivates a person, how a person sees an issue, and how that person interacts with others on team projects. Understanding one's own I-OPT Profile makes it possible to be more self-aware. Understanding another's I-OPT Profile helps predict how he or she will approach any given situation. (In a City Manager search, this will include I-OPT reports of the finalist candidates, direct reports, and city council. In department head searches, this will include I-OPT reports of the finalist candidates, City Manager, Assistant City Manager, peer department heads, and direct reports.)

### **Press Release (if desired)**

Until you have "sealed the deal," you need to be cautious in order to avoid the embarrassment of a premature announcement that does not work out. You also want to try to notify all senior staff and unsuccessful candidates before they read about it in the newspaper. SGR will assist with this coordination and with drafting any announcements or press releases.

### **Stakeholder Engagement (if desired)**

At the discretion of the Search Committee, we will work closely with your organization to engage stakeholders in the recruitment process. Our recommendation is that we design a specific stakeholder engagement process after we learn more about the organization and the community. Different approaches work best in different communities. Below is an array of options we have used in the past, but we will collaborate with your organization to determine

which option, or combination of options, will be the most effective for the unique needs of the organization.

- Interviewing community leaders at the outset of the search;
- Holding a public forum for citizen engagement at the outset of the search;
- Facilitating a Q&A series in the local newspaper with finalist candidates. This would run a week or two prior to the interviews;
- Utilize a citizen committee to conduct the early stage candidate screening and then turn over a semifinalist list to the City Council;
- Community leader reception;
- Meet and greet;
- Search Committee and key community leader dinner meeting;
- “Round Robin” forum meetings with various community groups during a multi-day interview process; and,
- Site visits by citizen committee members to the finalist candidates’ communities to report back.

## **Step 6: Interview Process**

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

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

“First Year Game Plan” process where finalist candidates are provided with elected official, key staff, and community leader contact information, and the candidates are given free rein to make contact with all of them in advance and use those insights to develop a “first year game plan” based on what they know so far. Feedback is received from the key contacts on their impressions of the finalist candidates from the interactions with the candidates prior to the interviews.

### **Assessment Exercise**

This is a proprietary assessment exercise customized to your search. Our assessment exercise provides the opportunity to evaluate candidates’ written and interpersonal communication skills, as well as critical analysis skills.

### **Conduct Interviews**

SGR will schedule interviews at a date/time convenient to your organization. This process can be as simple, or as complex, as your organization desires. SGR will help you determine the specifics you need. SGR will prepare sample interview questions and will participate throughout the process to make it smooth and efficient.

### **Deliberations**

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

## **Reference Checks**

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

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

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

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

Upon request, SGR will provide comparative data for selected organizations, appropriate employment agreement language, and other similar information to assist you in determining an appropriate offer to extend to your candidate of choice.

### **Negotiate Terms and Conditions of Employment**

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will determine and define any special needs or concerns of the chosen candidate, including anything that could be a complicating factor. SGR is experienced and prepared to help craft win-win-solutions to negotiation "log-jams."

### **Transition Strategy**

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

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

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SGR can provide a customized team building workshop after you hire for the position. SGR utilizes I-OPT, which is a validated measurement tool that shows how a person perceives and processes information. Because people "see" different things when they assess a situation, they are motivated to take various courses of action, so understanding you and your colleagues' I-OPT Profiles will enable you to work much more effectively as a team. Price is \$4,000 for a half-day onsite workshop, plus travel expenses, and \$150 per person for I-OPT reports (if not previously completed as part of the search process), which include Individual Analysis Report, Emotional Impact Management Report, Change Management Report, and Team Management Report. Two-Person Reports can be ordered for an additional fee of \$50 per report.



## Timeline (Standard Search)

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

***\*Each search timeline is different based on the particular needs of the organization. SGR has completed searches in as little as 45 days, although this is not the recommended approach. We have also extended searches well beyond 15 weeks, based on the preference of the client.***



## Proposed Cost

### All-Inclusive Maximum Price

Professional Services Fee:	\$ 18,500
<u>Expenses Not-to-Exceed:</u>	<u>\$ 8,500</u>
<b>All-Inclusive, Not-to-Exceed Maximum Price:</b>	<b>\$ 27,000*</b>

### Expense Items (*Included in Not-to-Exceed Price Above*)

SGR considers incidentals to be covered by the professional services fee, and we do not bill the client for any expenses except for those explicitly detailed herein.

Expense items include:

- Professional production of a high quality brochure. This brochure (typically 3-4 pages) is produced by SGR's graphic designer for a flat fee of \$1,500.
- Ad placement in appropriate professional publications, including trade journals and websites, and related advertising to announce the position. This is billed at actual cost, with no markup for overhead.
- Printing of documents and materials. Reproduction costs for reports and briefing books presented to the client at 23 cents per copy, plus the cost of binders/binding. Electronic discs are billed at \$5 each. Flash drives are billed at \$10 each.
- Online interviews. There is a cost of \$200 for each recorded online interview. SGR recommends conducting online interviews at the semifinalist stage (up to 12 semifinalists).
- Psychometric Assessments. There is a cost of \$150 per candidate for the DiSC Management Profile. There is a cost of \$150 per candidate for the I-OPT Assessment as well (up to 6 finalists).
- Comprehensive Media Reports – Stage 2. There is a cost of \$350 per candidate. SGR recommends conducting Stage 2 media searches on the finalist candidates (up to 6 finalists).
- Comprehensive Background Investigation Reports. There is a cost of \$300 per candidate for comprehensive background screening reports prepared by our licensed private investigations provider. SGR recommends conducting comprehensive background investigations on the finalist candidates (up to 6 finalists).
- Travel and related costs for the Project Manager incurred for the benefit of the client. Meals are billed back at a per diem rate of \$10 for breakfast, \$15 for lunch, and \$25 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost, with no markup for overhead.

## **\*Supplemental Services**

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

- Candidate Travel. Candidates are typically reimbursed directly by the client for travel expenses. If the client prefers a different arrangement for candidate travel, SGR will be glad to accommodate the client's wishes.
- Recruitment video. SGR offers the option of a customized recruitment video for a cost of \$5,000.
- Post-Hire Team Building Analysis. A half-day onsite workshop is \$4,000, plus travel expenses, and \$150 per person for I-OPT reports (if reports were not previously completed as part of the search process), which include Individual Analysis Report, Emotional Impact Management Report, Change Management Report, and Team Management Report. Two-Person Reports can be ordered for an additional fee of \$50 per report.
- Site Visits to Communities of Finalist Candidates. If desired, the Project Manager will travel to the communities of the finalist candidates to conduct onsite visits. Site visits will be charged at a day rate of \$1,000 per day, plus travel expenses.
- In the unexpected event the client shall request that unusual out of pocket expenses be incurred, said expenses will be reimbursed at the actual cost with no mark up for overhead.
- If the client desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval. Supplemental services will be billed out at \$250 per hour.

## **Billing**

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

## **Provision of Service Guarantee**

SGR guarantees that you will be satisfied with the results of the search process, or we will repeat the entire process at no additional professional fee until you find a candidate that you desire. Additionally, if you select a candidate who resigns or is released within 24 months of their hire date, SGR will repeat the process at no additional professional fee to the client. We also guarantee that we will not directly solicit a candidate we bring to you for another job.



## References

Doug Schulze, City Manager  
City of Bainbridge Island, Washington (pop. 21,000)  
Email: [dschulze@bainbridgewa.gov](mailto:dschulze@bainbridgewa.gov)  
Phone: 206-780-8626

Jennifer Fadden, City Manager  
City of Colleyville, Texas (pop. 24,000)  
Email: [jfadden@colleyville.com](mailto:jfadden@colleyville.com)  
Phone: 817-503-1116

Jon Amundson, Assistant City Manager  
City of Richland, Washington (pop. 47,000)  
Email: [jamundson@ci.richland.wa.us](mailto:jamundson@ci.richland.wa.us)  
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Lynn Barboza, Human Resources Manager  
City of Las Vegas, Nevada (pop. 567,000)  
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Phone: 702-229-4879

Matt Mueller, Town Manager  
Town of Little Elm, Texas (pop. 5,100)  
Email: [mmueller@littleelm.org](mailto:mmueller@littleelm.org)  
Phone: 214-975-0405

Passion Hayes, Director of Human Resources  
Town of Addison, Texas (pop. 15,000)  
Email: [phayes@addisontx.gov](mailto:phayes@addisontx.gov)  
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Kurt Bressner  
ICMA Range Rider-Florida and former City  
Manager for Boynton Beach, Florida  
Email: [kbressner@gmail.com](mailto:kbressner@gmail.com)  
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Jim Landon, City Manager  
City of Palm Coast, Florida (pop. 73,000)  
Email: [jlandon@palmcoastgov.com](mailto:jlandon@palmcoastgov.com)  
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Doug Smith, City Manager  
City of Margate, Florida (pop. 54,000)  
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Phone: 954-972-6454





## Recent City Manager and Deputy/Assistant City Manager Searches

### 2015

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#### City/Town Manager

- Abilene, Texas (pop. 118,000)
- Altus, Oklahoma (pop. 19,000)
- Alvin, Texas (pop. 23,000)
- Arcadia, Florida (pop. 7,500)\*
- Baytown, Texas (pop. 70,000)
- Ballwin, Missouri (pop. 30,000) – in process
- Bedford, Texas (pop. 49,000) – in process
- Bridgeport, Texas (pop. 6,000)
- Georgetown, Texas (pop. 50,000)
- Granbury, Texas (pop. 6,800)
- Guthrie, Oklahoma (pop. 10,000)\*
- Kaufman, Texas (pop. 8,900)
- Lamesa, Texas (pop. 9,300)
- Missouri City, Texas (pop. 74,000) – in process
- Montgomery, Texas (pop. 600)
- Muskegon Heights, Michigan (pop. 11,500) – in process
- Sealy, Texas (pop. 6,000) – in process

#### Deputy/Assistant City Manager

- Fort Worth, Texas, ACM (pop. 790,000) – in process
- Waco, Texas, ACM (pop. 129,000) – in process

### 2014

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#### City/Town Manager

- Chapel Hill, Tennessee (pop. 1,500)\*
- Converse, Texas (pop. 19,500)\*
- Duncanville, Texas (pop. 36,400)
- Fate, Texas (pop. 7,000)
- Galveston, Texas (pop. 56,000)\*
- Joshua, Texas (pop. 6,000)
- Kilgore, Texas (pop. 13,000)
- Kyle, Texas (pop. 30,500)
- Lindale, Texas (pop. 5,000)
- Miami, Oklahoma (pop. 13,500)
- Nolensville, Tennessee (pop. 3,100)\*
- Port Arthur, Texas (pop. 56,700)
- Stephenville, Texas (pop. 17,400)
- Tyler, Texas (pop. 98,800)

### **Deputy/Assistant City Manager**

- Addison, Texas, DCM (pop. 15,700)
- Denison, Texas, ACM (pop. 24,000)
- El Paso, Texas, DCM-Transportation and Public Works (672,000)\*
- Manhattan, Kansas, ACM (pop. 56,000)\*
- Plainview, Texas, ACM (pop. 3,200)\*

## **2013**

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### **City/Town Manager**

- Bellaire, Texas (pop. 17,000)
- Big Spring, Texas (pop. 27,500)\*
- Burien, Washington (pop. 49,000)
- Burkburnett, Texas (pop. 10,500)
- College Station, Texas (pop. 98,000)
- Delray Beach, Florida (pop. 62,000)\*
- Fate, Texas (pop. 800)
- Ferris, Texas (pop. 2,500)
- Henderson, Texas (pop. 14,000)
- League City, Texas (pop. 88,000)
- Manhattan, Kansas (pop. 56,000)\*
- Owasso, Oklahoma (pop. 31, 500)
- Pearland, Texas (pop. 96,000)
- San Marcos, Texas (pop. 50,000)
- Sikeston, Missouri (pop. 16,000)
- South Padre Island, Texas (pop. 3,000)
- Wills Point, Texas (pop. 3,500)

### **Deputy/Assistant City Manager**

- Amarillo, Texas, ACM- Development Services (pop. 195,000)
- Cape Girardeau, Missouri, ACM-Development Services (pop. 38,500)\*
- Cape Girardeau, Missouri, ACM-Administrative Services (pop. 38,500)\*
- McKinney, Texas, DCM (pop. 143,000)\*
- Orange County, North Carolina, ACM (pop. 138,000)\*

## **2012**

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### **City Manager**

- Argyle, Texas (pop. 3,500)
- Bainbridge Island, Washington (pop. 23,000)
- Breckenridge, Texas (pop. 5,500)
- Burkburnett, Texas (pop. 11,000)
- Canton, Texas (pop. 3,500)
- Cleveland, Texas (pop. 7,600)
- Duncanville, Texas (pop. 39,000)
- Elk City, Oklahoma (pop. 12,000)
- Fate, Texas (pop. 7,500)

- Flower Mound, Texas (pop. 67,500)
- Guthrie, Oklahoma (pop. 10,500)\*
- Hot Springs, Arkansas (pop. 35,000)
- Huntsville, Texas (pop. 39,500)
- Jacksboro, Texas (pop. 4,000)
- La Porte, Texas (pop. 34,500)
- Little Elm, Texas (pop. 28,500)
- Miami, Oklahoma (pop. 13,500)
- Paris, Texas (pop. 25,000)
- Piney Point Village, Texas (pop. 3,200)\*
- Rockwall, Texas (pop. 39,000)
- San Angelo, Texas (pop. 95,500)
- Texarkana, Texas (pop. 37,000)
- Van Alstyne, Texas (pop. 3,000)
- Willow Park, Texas (pop. 4,000)

**Deputy/Assistant City Manager**

- Brentwood, Tennessee, ACM (pop. 39,000)\*
- Cedar Park, Texas, ACM (pop. 58,000)
- Corpus Christi, Texas, ACM (pop. 312,000)
- Victoria, Texas, ACM (pop. 64,000)\*

**2011**

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**City Manager**

- Breckenridge, Texas (pop. 5,500)
- College Station, Texas (pop. 98,000)\*
- Gonzales, Texas (pop. 7,000)
- Kilgore, Texas (pop. 13,500)
- Van Alstyne, Texas (pop. 3,000)
- Yoakum, Texas (pop. 5,500)

**2010**

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**City Manager**

- Amarillo, Texas (pop. 195,000)
- Burkburnett, Texas (pop. 10,500)
- Denison, Texas (pop. 23,000)

**Deputy/Assistant City Manager**

- Midland, Texas, ACM (pop. 119,000)\*

\*Component based services include, but are not limited to, social media and marketing, application management, psychometric assessments, background investigation reports, media search reports, reference checks, and resume evaluations.

Population numbers are approximate. Resource: [www.City-Data.com](http://www.City-Data.com)



## Executive Search Clients

Abilene, Texas	Commerce, Texas	Hancock County Port & Harbor Commission, Mississippi
Addison, Texas	Converse, Texas	Harris County ESD No. 48, Texas
Alamo Heights, Texas	Copper Canyon, Texas	Henderson, Texas
Alice, Texas	Corpus Christi, Texas	Hewitt, Texas
Altus, Oklahoma	Dalhart, Texas	Highland Park, Texas
Alvin, Texas	Delray Beach, Florida	Hot Springs, Arkansas
Amarillo, Texas	Denison, Texas	Hudson Oaks, Texas
Arcadia, Florida	Denton, Texas	Huntsville, Texas
Argyle, Texas	Denton County Fresh Water Supply District 1-A, Texas	Hutto EDC, Texas
Arlington, Texas	Duncanville, Texas	Irving, Texas
Atlanta, Texas	El Paso, Texas	Jacksboro, Texas
Azle, Texas	El Paso MPO, Texas	Jacksonville Development Corporation, Texas
Bainbridge Island, Washington	Elk City, Oklahoma	Joshua, Texas
Baytown, Texas	Farmers Branch, Texas	Kaufman, Texas
Bellaire, Texas	Farmersville, Texas	Keller, Texas
Big Spring, Texas	Farmington, New Mexico	Kilgore, Texas
Breckenridge, Texas	Fate, Texas	Kyle, Texas
Brentwood, Tennessee	Ferris, Texas	La Porte, Texas
Bridgeport, Texas	Flower Mound, Texas	Lakeland, Florida
Burkburnett, Texas	Forney, Texas	Lakeway, Texas
Burleson, Texas	Fort Worth, Texas	Lamesa, Texas
Burien, Washington	Freeport, Texas	Lancaster, Texas
Burnet, Texas	Friendswood, Texas	Las Vegas, Nevada
Canton, Texas	Gainesville, Texas	Lawton, Oklahoma
Cape Girardeau, Missouri	Galveston, Texas	League City, Texas
Cedar Hill, Texas	Georgetown, Texas	Leander, Texas
Cedar Park, Texas	Gonzales, Texas	Lenexa, Kansas
Chapel Hill, Tennessee	Granbury, Texas	Lindale, Texas
Cleveland, Texas	Grand Prairie, Texas	Little Elm, Texas
College Station, Texas	Grapevine, Texas	Longview, Texas
Colleyville, Texas	Greenville, Texas	
Colorado River Municipal Water District, Texas	Guthrie, Oklahoma	

## Executive Search Clients

Lorena, Texas	Richland Hills, Texas	Washoe County, Nevada
Los Lunas, New Mexico	Riverbend Water District, Texas	Waxahachie, Texas
Lufkin, Texas	Rockwall, Texas	Weatherford, Texas
Manhattan, Kansas	Round Rock, Texas	Westlake, Texas
McKinney, Texas	Rowlett, Texas	West Lake Hills, Texas
McKinney EDC, Texas	Royse City, Texas	Westworth Village, Texas
Memorial Villages PD, Texas	San Angelo, Texas	Wheat Ridge, Colorado
Miami, Oklahoma	San Marcos/Hays County EMS, Texas	Willow Park, Texas
Midland, Texas	San Marcos, Texas	Wills Point, Texas
Midlothian, Texas EDC	Seabrook, Texas	Yoakum, Texas
Montgomery, Texas	Seagoville, Texas	
Mount Pleasant, Texas	Sealy, Texas	
Mustang, Oklahoma	Shoreline, Washington	
Nolensville, Tennessee	Sikeston, Missouri	
North Texas Emergency Communications Center, Texas	Socorro, Texas	
Orange County, North Carolina	Southlake, Texas	
Overland Park, Kansas	South Padre Island, Texas	
Owasso, Oklahoma	St. Charles, Missouri	
Palestine, Texas	Stephenville, Texas	
Paris, Texas	Sugar Land, Texas	
Pearland, Texas	Sunny Isles Beach, Florida	
Piney Point Village, Texas	Temple, Texas	
Plainview, Texas	Terrell, Texas	
Plano, Texas	Texarkana, Texas	
Port Arthur, Texas	TexAmericas Center	
Port Lavaca, Texas	Thompson's Station, Tennessee	
Prosper, Texas	Tomball, Texas	
Red Oak, Texas	Trophy Club, Texas	
Richardson, Texas	Tyler, Texas	
Richland, Washington	Van Alstyne, Texas	
	Victoria, Texas	

# Executive Search Recruited Positions

## **Administration**

City Manager/City Administrator  
Deputy City Manager  
Assistant City Manager  
Assistant County Manager  
City Secretary

## **Administrative Services/Internal Services**

Administrative Services Director  
Manager of Town Services  
Management Assistant  
Chief Performance Officer  
Human Resources/Civil Services Director  
Director of Human Resources & Risk Management  
Intergovernmental Services Manager  
Fleet Equipment Services Manager  
Facilities Services Manager  
Assistant Municipal Garage Superintendent  
Fixed-Base Operator Services  
Arts Director

## **Animal Services/Environmental Health**

Animal Services Manager  
Animal Shelter Manager  
Animal Welfare Director  
Animal Welfare Manager  
Chief Medical Examiner  
Environmental Health Director  
Assistant Director of Code Compliance/Animal Welfare  
Director of Regional Animal Services

## **Development Services**

Community Development Director/Manager  
Development Services Director  
Deputy Director of Development Services  
Tourism and Community Development Director  
Community Services Administrator  
Senior Building Inspector/Building Inspector  
Chief Building Official  
Building Official  
City Inspector  
New Urbanist

## **Economic Development, CVB**

Assistant Economic Development Director  
CVB Executive Director  
Downtown Development Director  
Economic Development Director  
Economic Development Executive Director

Executive Director of Port & Harbor Commission  
Vice President/Chief Econ Development Officer  
President of Development Corporation

## **Finance**

Finance Director  
Chief Financial Officer  
Finance Manager  
Assistant Director of Finance  
Finance Controller/Auditor/Comptroller  
Senior Accountant  
Budget Officer

## **Information Technology**

IT Director  
Chief Technology Officer/Chief Information Officer  
IT Assistant Director  
IT Manager  
IT Developer  
GIS Manager  
Senior Software Developer

## **Legal**

City Attorney (Individual and Firm)  
First Assistant City Attorney  
Court Administrator

## **Library**

Library Director  
Librarian

## **Marketing and Community Engagement**

Director of Marketing and Community Engagement  
Community Relations Manager  
Community Services Director  
Public Information Officer

## **Metropolitan Planning Organization**

Director of Metropolitan Planning Organization

## **Museum**

Museum Director

## **Parks and Recreation**

Parks and Recreation Director  
Park Superintendent  
Program Area Manager (Parks)  
Recreation Superintendent

# Executive Search Recruited Positions

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

Emergency Management Coordinator  
EMS Executive Director  
Executive Director  
Police Chief  
Assistant Police Chief  
Fire Chief  
Assistant Fire Chief  
Lieutenant

## **Public Works/Utilities/ Engineering**

City Engineer  
Assistant City Engineer  
Director of Public Services  
Public Works Director  
Public Works Assistant Director  
Water District Executive Director  
Water District General Manager  
Planning & Engineering Director  
Director of Projects & Engineering  
Engineering Project Manager  
City Planner  
Chief Plant Operator  
Assistant Utilities Director  
Director of Utilities  
Engineering Services Manager for Water District  
Assistant General Manager for Water District



## Unsolicited Feedback Regarding SGR's Performance

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

March 2015: "Thanks, [Executive Recruiter]. You and [SGR staff] made it an enjoyable experience and I am very pleased with the results. I hope we don't need your services anytime soon, but if we do, I will call you first.]

January 2015: "Even though it didn't work out, I appreciate you and your staff at SGR. Very professional and helpful; simply the best."

November 2014: "It was a pleasure working with you and your team, [Executive Recruiter]. SGR is a great organization and I'm very proud to work with you all!"

November 2014: "Thank you for your time and consideration. The communication received during this process was outstanding and very rare to receive in today's world. Thanks again."

October 2014: "Fantastic, you are making this whole process easy, informative and pleasant. Thank you for your attention and patience."

September 2014: "Thanks for all your great work. Your team is the best!"

August 2014: "Amazing customer service. It is so obvious that your whole team really cares and is very passionate about what they do. It is the best I have ever experienced."

August 2014: "Thanks for the great news! My experience during this process has been excellent. It can be unnerving to be on this side of the recruitment. You and your team have provided excellent communications and updates. Your efforts are greatly appreciated. I am very pleased to continue in the process."

August 2014: "Thanks so much for the quick response. I just have to ask - do you folks work 24/7? I get emails from you, [SGR staff] and Ron on the weekends, late at night, early in the morning. I must say, I've been in local government a long time and have never experienced a firm as responsive, prompt, courteous, and informative you all at SGR. You guys are fantastic!"

July 2014: "Not the news I was hoping for, but I'm glad you have such a great field of candidates. Once again, from my experience, you and your team execute the most professional search!"

July 2014: "I wanted to thank you for the great job that [Executive Recruiter] has done on our position. She was responsive to our needs and did a superb job of organizing and presenting the candidates. It has made our job much easier in moving forward in the process. It is great to be able to work with professionals like [Executive Recruiter] in the difficult task of finding the right individuals for our organization."

July 2014: "I was very impressed with our meeting and I feel like you were really listening to all the concerns and suggestions of the committee. Thank you very much for keeping me posted and I look forward to hearing from you soon."

July 2014: "Thank you for the professional handling of this search and the communication to the candidates. Makes us feel very much appreciated and not just 'another number'."

July 2014: "Thank you for letting me know the status of the search process. I appreciate the informative and timely updates from both you and [SGR staff]. I wasn't familiar with your firm prior to this search and am most impressed with the high level of personal service and professionalism that I have experienced over the past week."

July 2014: "I just want to thank you for the work that [Executive Recruiter] and SGR did on our recent Fire Chief search. Once again, you guys knocked it out of the park. [Executive Recruiter] was extremely accommodating, extremely accessible and extremely patient. He even indulged me when I asked tons of questions. You both are such great guys. I feel privileged to work with you guys and consider you friends. Thanks again."

July 2014: "I just wanted to take a moment and validate what I am sure you already know...your staff is top shelf! I recently went through the [city] [position] search with your company and everybody that I worked with at SGR was stellar; it was a pleasure working with each of them. [SGR staff] and especially [Executive Recruiter] were true professionals and kept me abreast of the process every step of the way with no surprises. It speaks volumes about SGR that you can attract and retain such quality individuals."

June 2014: "The selection process has ended for me as the [city] has gone with another candidate but I wanted to express my thanks to you for the assistance you provided me during my preparation. The information you provided was valuable and assisted me greatly. Thank you again, and I wish you and SGR all the best in the future."

June 2014: "I can already tell the SGR executive recruitment process is quite an experience. You and your team do a great job and I have no doubt you drive additional business through your courtesy and responsiveness to candidates. In short, extremely well done!"

June 2014: "Thanks for keeping us all updated...it speaks volumes for SGR's corporate culture and your personal integrity. I know that you know full well what we go thru. You guys are awesome and no matter the outcome of this process I will chalk it up to another positive experience with working with SGR."

May 2014: "We really appreciate all your help. Note: every candidate complimented [Executive Recruiter] and SGR!"

May 2014: "I also very much appreciate your assistance, and the assistance of everyone else associated with your company, during this process. Everyone was very helpful and kept me informed of the process."

April 2014: "My compliments again to SGR and the [city] on a well-organized, innovative, and highly responsive recruitment process."

March 2014: "I really appreciate all your help from start to finish in our search for a new city manager. I will definitely call you the next time we have an opening we need help filling. There is no doubt we, as a city, made the right decision to select SGR to bring us quality candidates."

March 2014: "Just a brief note to thank you both, and particularly [Executive Recruiter], for the professional and thorough search effort. Our final selection of [candidate] received unanimous support. This result speaks to the merits of the SGR process in recruiting and selecting the kind of top talent we were after."

October 2013: "I cannot begin to thank [SGR] enough for the services that were provided. SGR did an incredible job with this search. It ran very smoothly and efficiently. I cannot think of one thing that could be improved. Thank you so much!"

October 2013: "Just a short note to thank you for the multiple communications regarding your search. You folks are a class act as one rarely hears a thing from a search these days."

September 2013: "Thank you so much for a superb effort in assisting us in a search for [position]. ... I would recommend SGR to anyone. Your process is one that is highly likely to lead to success, certainly more so than a typical head-hunting outfit."

September 2013: "This was without a doubt as professional as I have seen. You did an amazing job. I look forward to working with you in the future. Thank again."

September 2013: "Thank you for the professionalism that you brought to this community when it was needed the most."

July 2013: "Just a brief note to say thank-you for considering me for [position]. While I am obviously disappointed in the final outcome, I cannot help but view the overall experience positively...I would also like to thank you for your professionalism through the process. You are a credit to your firm, and do all of us who serve the public a great service."

July 2013: "On behalf of [Department Head] and our entire HR team, I just want to thank you and your team members for making this search such a smooth and easy process for us."

June 2013: "I want you to know that [Executive Recruiter] did a fantastic job for us. He got us an outstanding list of applicants, made excellent recommendations regarding who we should be considering, and it was just a really terrific effort on SGR's part all the way around. [SGR staff] was most helpful during the posting process and wonderful to deal with over the phone. Your company added tremendous value to the process."

June 2013: "I am impressed with the technology, thoroughness and professionalism of SGR in the selection process you're conducting for [client]."

May 2013: "THANK YOU FOR ALL YOUR ASSISTANCE! What an AMAZING team at SGR... I'm loving this experience working with you all."

May 2013: "Just wanted to pass along my sincere THANKS to you and [Executive Recruiter]. [SGR's] efforts to support our search for [position] were extremely professional and meshed well with our constrained timeline. We feel confidence that the candidate selected will perform to our high level of expectation. Thanks again."

April 2013: "It has been a pleasure being considered for the position [with client]. Although not chosen for the position, I feel I am better prepared for future interviews (live or recorded) due to my interaction with Strategic Government Resources. The level of professionalism shown by your entire staff at SGR has been exemplary. Throughout the entire process phone messages and emails were returned promptly, enabling me to become more prepared for the interview process. If I can be of any assistance to you in the future, please do not hesitate to call upon me."

March 2013: "...having been part of a few national searches over the past year, I sincerely appreciate the prompt and meaningful communication you and your firm embraced in this process. It made it a refreshing experience."

February 2013: “[Executive Recruiter] and SGR deserve significant credit for not only helping us find the best fit for our community but moreover for being an integral component in ensuring the [client] has vital human resources necessary to meet [department] challenges ahead and excel beyond the goals set before us. For your guidance and expertise, we are truly appreciative.”

January 2013: “Thank you. The fact that you have continually taken the initiative to keep me up to date speaks volumes to your ethics and professionalism. Quite honestly, both of these qualities have become less evident in the field.”

December 2012: “Your firm and employees have a level of caring and customer service our organization aspires to. You have made excellence of product and service the standard for your firm. You guys are one of very few firms (maybe the only one I know of) that has made superior customer service its everyday standard to the point where even great customer service would be a letdown.”

November 2012: “Thanks for the simple and continuous communications throughout the process. I have submitted over 20 applications and you are the only one that has provided communication throughout. I truly appreciate the communication in a tough process to find employment.”

November 2012: “I wanted to thank you for an outstanding experience regardless of eventual outcome. [The search] was very well done, head and shoulders above any past experience that I have had...well done and thanks!”

September 2012: “I have really enjoyed being able to participate in the recruitment process to date. I was especially intrigued with the use of online interview technology...I also really like the way you’ve organized the First Year Game Plan exercise. It’s a really neat way for the candidates, city staff and council members to get to know one another better before the formal interviews take place.”

September 2012: “Like many in the city manager profession, I have experienced and participated in a number of different search processes as a candidate as well as employer. The search process for the [client] City Manager position was my first experience with a search conducted by SGR. Without question, your process was the most thorough search I have experienced in 25 years and dozens of searches. As a candidate, I felt the process challenged me to be extremely well-informed about the position and the community. In addition, all SGR representatives provided me with accurate, timely and complete information throughout the search process. Congratulations and thank you!”

June 2012: “Again, I want to THANK YOU and your staff I have had the pleasure to work with. There definitely is a reason you are swamped with searches. The “Golden Rule” is serving SGR well. Please know that [staff members] have all been great and they have certainly helped me through this transition.”

June 2012: “Our organization continues to be delighted with our search results. When we made the commitment to take [the department] to the next level we only hope our search would equip us with the tools...man, did we get what we were looking for!”



## CITY OF BALLWIN, MISSOURI

### City Administrator Position Profile

#### THE COMMUNITY

Located in the heart of prestigious West St. Louis County, Ballwin, Missouri is a dynamic community of more than 30,000 residents. Covering 10 square miles, the city is ideally situated in the St. Louis Metro area with easy access to Interstates 270, 64, and 44. Ballwin is the fifth largest city in St. Louis County which has a population of more than 1 million people. Ballwin is located 30 minutes from the St. Louis–Lambert International Airport and only 40 minutes from downtown St. Louis.

Ballwin was founded in 1800 by John and Mary Bray Ball. The town's original name was Ballshow and was changed to Ballwin in 1837. Ballwin grew from a small town with few homes and businesses to a small village of 750 people when it was incorporated on December 29, 1950 as a City of the Fourth Class under Missouri Law.

Named as **“One of the Best Places to Live”** by *Money Magazine* in 2005, 2011, and again in 2013, Ballwin prides itself on the wide range of programs and services available to its residents. Consistently recognized as one of the safest and best places to raise a family, Ballwin was designated **“2<sup>nd</sup> Safest City in Missouri”** and **“9<sup>th</sup> Safest City in the US”** by Neighborhood Scout. In 2012, Ballwin was named by both *Businessweek* and *Family Circle* magazines as a **“Top City for Family”** and one of the **“Best 10 Towns for Families”** respectively. In 2014 Ballwin was recognized as the **#7 Top Small City in Missouri** by Cities-Journal.com.

Ballwin offers a wide range of quality of life amenities. Two state-of-the-art recreational facilities, The Pointe at Ballwin Commons Community Center and North Pointe Family Aquatic Center, provide exceptional opportunities for family fun, leisure time, and personal fitness. Ballwin's municipal golf course is recognized as the best public nine-hole facility in the area and was acclaimed with the prestigious *“Editor's Choice Award”* by *St. Louis magazine* as **“Best Quality Golf.”**

Beautiful Vlasick Park is the crown jewel of the City's parks system and covers 31 acres featuring baseball diamonds, tennis courts, ponds, a pavilion, volleyball courts, and an array of outdoor and recreational elements. The park is home to the annual Ballwin Days festival featuring activities for the entire family including a parade, carnival rides, fireworks, live entertainment, and the Ballwin Days 5K and 1 Mile Run.

Residents and visitors enjoy easy access to various professional sports teams including the St. Louis Cardinals, the St. Louis Blues, and the St. Louis Rams. With Castlewood State Park and Meramac River nearby, there are ample opportunities for a variety of outdoor adventures.





## City of Ballwin, Missouri // City Administrator Position Profile

### THE COMMUNITY, continued

Quality education is a priority in Ballwin. The community is served by two AAA rated districts. The premiere Rockwood School District serves 21,351 students in grades Pre-K through 12 on 30 campuses. Rockwood SD is recognized for high student achievement, outstanding teachers and staff, and great community support. Parkway School District serves 17,148 students in grades Pre-K through 12. Parkway's college entrance exam scores are among the best in the county and the District has 14 nationally recognized "Blue Ribbon" schools of excellence. Additionally, Parkway is accredited and recognized for "Distinction in Performance for High Achievement," the highest rating available by the Missouri Department of Elementary and Secondary Education.

Several major universities and colleges are located nearby including Washington University, St. Louis University, Maryville University of St. Louis, Missouri Baptist University, Webster University, St. Louis Community College, Lindenwood University, and University of Missouri-St. Louis.

The median income in Ballwin is \$81,351, and the average home price is \$210,000.

### GOVERNANCE & ORGANIZATION

The City of Ballwin operates under a Mayor-Alderman-City Administrator form of government. The Mayor and eight Aldermen make up the governing body and serve two-year terms. The Mayor is elected at large, and two Aldermen are elected from each of four wards. The City Administrator is the chief administrative official of the City and is responsible to the Mayor and Alderman for the day-to-day operations of the organization. The City Administrator is designated by ordinance to retain authority for all personnel decisions.

The City has 142 employees organized into four departments including Administration, Parks and Recreation, Police, and Public Works. Administration encompasses legislation, public relations, occupancy/building permits and inspections, code enforcement, planning, zoning, licensing, finance, human resources, and municipal court.

The City has a 2015 operating budget of \$18.9 million. There has been no municipal property tax since 1987, and City services are financed primarily by sales tax, utility gross receipts taxes, and recreational revenues. Real estate taxes are collected by St. Louis County, the area school districts, and other governmental agencies. The utility tax rate is 7% and the sales tax rate is 8.113%.





## City of Ballwin, Missouri // City Administrator Position Profile

### LEADERSHIP & INNOVATION

There will be several key issues for the new City Administrator to address:

- Currently under review is the method of pooled sales tax distribution to municipalities in St. Louis County. Regardless, the new City Administrator should be prepared to explore viable new revenue sources to augment sales tax revenues.
- Several long-tenured department directors are expected to retire in the next three to seven years. It will be essential that the new City Administrator prepare for succession management and glean the significant “institutional memory” from these key staff members.
- Retention and attraction of retail businesses will be an important goal to ensure Ballwin’s continued economic growth in the region.
- The City seeks an initiative to encourage development of housing options for residents aged 55 and over with the City Administrator playing an important role in devising a plan.
- As with many communities, Ballwin has aging housing stock and aging infrastructure. The new City Administrator will need to develop a strategy to address these issues.
- The City Administrator will lead the development of a new city hall facility.



### IDEAL CANDIDATE

The City of Ballwin has a very stable governing board. The Mayor and Aldermen seek a new City Administrator to lead the organization that includes a long-tenured senior staff and a dedicated work force that delivers a slate of high quality municipal services to residents. The current City Administrator is retiring after serving Ballwin in that role for 27 years.

The ideal candidate will:

- Desire to make Ballwin home for the long term
- Be energetic, yet have a calm and diplomatic leadership style
- Lead by example, maintain positive staff morale, and reward good work efforts
- Possess excellent presentation skills
- Be skilled at providing guidance to the governing board
- Have demonstrated knowledge of information technology and the use of social media
- Be active in the community
- Embrace innovation and be an “idea” person
- Have the ability to establish a leadership position among the city managers in St. Louis County





## City of Ballwin, Missouri // City Administrator Position Profile

### EDUCATION & EXPERIENCE

A Bachelor's Degree in public or business administration or a related field from an accredited college or university is required. A Master's Degree is required. The new City Administrator must have seven years of city management experience in a comparable community, or assistant city management experience in a larger city. Experience in a suburban community is a plus.

### COMPENSATION & BENEFITS

The salary range for this position is \$120,000 - \$150,000 depending on qualifications and experience. The City participates in Missouri's Local Government Employees' Retirement System (LAGERS), and a full range of leave and insurance benefits is also provided. It is preferred that the chosen candidate establish residency in Ballwin. A car allowance and a relocation expense reimbursement are also provided.

### APPLICATION PROCESS

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

For more information on this position, contact:

**Gary Holland, Senior Vice President**  
Strategic Government Resources  
[GaryHolland@GovernmentResource.com](mailto:GaryHolland@GovernmentResource.com)  
405-269-3445

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

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

### RESOURCES

**City of Ballwin, MO**  
[www.ballwin.mo.us](http://www.ballwin.mo.us)

**Parkway School District**  
[www.parkwayschools.net](http://www.parkwayschools.net)

**Rockwood School District**  
[www.rockwood.k12.mo.us](http://www.rockwood.k12.mo.us)







## Background Screening Report

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

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

## Application Information

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

## Identity Development

## Person Search - SSN TRACE/ ADDRESS VERIF

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

## SSN Information

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

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

## Credit

## Credit Summary

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

## Financial Summary

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

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

## Variations

## Personal Information Comparison

	<b>NAME</b>	<b>SOC SEC</b>	<b>DOB</b>	<b>AKA</b>
APPLICANT	TESTCASE, JANET	XXX-XX-6789	10/05/1962	
TU	TESTCASE, JANET	MISMATCH		

**Address Comparison**

	<b>ADDRESS</b>	<b>REPORTED</b>
APPLICANT	TU 19 FOREST DR , BEDROCK, TX 75214	04-02-2015

**Employment Comparison**

<b>COMPANY</b>	<b>POSITION</b>	<b>REPORTED</b>
	NO EMPLOYERS DEVELOPED	

**Credit Bureau Report**

**Credit History**

CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE			TYPE TERMS	PRESENT STATUS	E C O A
						30	60	90+			

NO TRADELINES DEVELOPED

ECOA KEY: B = BORROWER; C = CO-BORROWER; S = SHARED; J = JOINT; U = UNDESIGNATED; A = AUTHORIZED USER

**Public Records**

NO PUBLIC RECORDS DEVELOPED

**Prior Inquiries**

<b>CREDITOR</b>	<b>INQUIRY TYPE</b>	<b>DATE</b>	<b>SRC</b>	<b>KIND OF BUSINESS</b>	<b>ECOA</b>

NO PRIOR INQUIRIES DEVELOPED

**Repository Remarks**

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

**Source Information**

**Creditors**

CREDITOR	SUB CODE	ADDRESS	PHONE
NO CREDITORS DEVELOPED			

**Submission Results**

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

**Repository Referral**

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

**Comments**

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

**Investigative**

**County Criminal Records Search**

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

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

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

**Count-1**

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

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

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

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**COUNTY WANTS AND WARRANT**


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NO REPORTABLE RECORDS FOUND - DALLAS COUNTY  
JANET TESTCASE

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**State Criminal Records Search**


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

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

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**Federal Criminal Records Search**


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

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

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**InstaCriminal National Search**


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

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

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

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**Global Homeland Security Search**


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

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

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

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#### Sex Offender Records Search

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

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

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#### County Civil Records Search

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

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

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

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

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#### Credentials

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##### Education Verification

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

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#### Instant Driving Records

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

**License Info**

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

**Other License Info**

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

**Messages**

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

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

## COMPREHENSIVE REPORT

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

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

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

Age: 31

**Names Associated With Subject:** 

JANET L TESTCASE LexID: 8071868866 DOB: 1962


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

Names Associated With Subject:


2 Found

Others Associated With Subjects SSN:

None Found

 Address Summary:

2 Found

 Active Address(es):


1 Found

 Previous & Non-Verified Addr:


1 Found

 Possible Criminal Records:

None Found

 Sexual Offenses:


None Found

 Driver's License:

1 Found

 Motor Vehicles Registered:


1 Found

 Concealed Weapons Permit:


None Found

DEA Controlled Substances:


None Found

 Professional Licenses:


None Found

 Watercraft:


None Found

 Bankruptcies:

None Found

 Liens and Judgments:


None Found

 UCC Filings:

None Found


 Possible Properties Owned:

1 Found

 Possible Associates:

None Found

**Address Summary:** 

19 FOREST DR , BEDROCK, TX 77469-1826, HIDALGO COUNTY ( 1995- Jan 2015)  
 12924 PECOS RD, KNOXVILLE TX 37934-0885, KNOX COUNTY (Feb 2002 - Jan 2015)  
 7404 TOWN CENTER BLVD APT 808, ROSENBERG TX 77471-6232, FORT BEND COUNTY (Apr 2011 - May 2014)  
**Utility Locator - Connect Date:** 4/28/2011  
 21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY (Jun 2007 - Oct 2013)  
 1611 LAUREL AVE APT 303, KNOXVILLE TN 37916-2078, KNOX COUNTY (Oct 2005)  
 135 WHITE DR APT -2, TALLAHASSEE FL 32304-3090, LEON COUNTY (May 2004 - Jun 2004)  
 1505 W THARPE ST APT 3632, TALLAHASSEE FL 32303-4575, LEON COUNTY (Sep 2002 - Jan 2004)

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

JANET TESTCASE

**Current Residents at Address:**

DAVID TESTCASE

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

Parcel Number - 5121-06-001-0320-901  
 Owner Name: DAVID WTESTCASE LexID: 2561089892  
 Owner Name 2: JANET TESTCASE LexID: 2561096692  
 Property Address: - 19 FOREST HILL, BEDROCK TX 77406-6453, HILDAGO COUNTY  
 Owner Address: 21027 JAMES LONG CT, RICHMOND TX 77406-6453, FORT BEND COUNTY  
 Sale Date - 05/29/1995  
 Sale Price - \$325,850  
 Subdivision Name - LONG MEADOW  
 Total Market Value - \$467,230  
 Assessed Value - \$443,810  
 Land Value - \$89,250  
 Improvement Value - \$377,980



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

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

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

##### Name Associated with Address:

DAVID TESTCASE

##### Current Residents at Address:

STEVEN FRYER

##### Property Ownership Information for this Address

##### Property:

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

1

#### Possible Criminal Records:

[None Found]

#### Sexual Offenses:

[None Found]

#### Driver's License Information:


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

#### Motor Vehicles Registered To Subject:

##### Vehicle:

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

##### Registrant(s)

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

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

#### Concealed Weapons Permit:

[None Found]

#### DEA Controlled Substances:

[None Found]

#### Professional License(s):

[None Found]

#### Watercraft:

[None Found]

 **Bankruptcies:** 

[None Found]

 **Liens and Judgments:** 

[None Found]

 **UCC Filings:** 

[None Found]

 **Possible Properties Owned by Subject:** 

**Property:**

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

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

 **Possible Associates:** 

NONE FOUND

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**Disclaimer**

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

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

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SECTION IV  
PROPOSAL FORMS

**RFP # 2015-01**

The undersigned hereby declares that after examining the Proposal Documents, does hereby submit a response to the proposal and warrants that:

- a. She/He is an officer of the organization.
- b. She/He is authorized to offer a proposal in full compliance with all requirements and conditions, as set forth in the RFP.
- c. She/He has fully read and understands the RFP and has full knowledge of the scope, nature, quantity and quality of the work to be performed, and the requirements and conditions under which the work is to be performed.

Cyndy Brown  
Authorized Signature

Cyndy Brown, Managing Director  
Printed Name & Title

SGR  
Company Name

PO Box 11642  
Company Address

Keller TX 76244  
City, State, Zip Code

06-22-2015  
Date

817-337-8581  
Phone Number

Cyndy Brown@governmentresource.com  
Email Address

SWORN STATEMENT UNDER SECTION §287.133(3)(A), FLORIDA STATUTES, ON THE PUBLIC ENTITY CRIMES (To be signed in the presence Of a notary public or other officer authorized to administer oaths.)

STATE OF Texas COUNTY Tarrant

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

Name of Proposer: SGR, Cindy Brown  
Business Address: PO Box 1642 Keller TX 76244

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 agency or political subdivision of any other state or with the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or any such agency or political subdivision and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

I understand that “convicted” or “conviction” is defined by the statute 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, nonjury trial, or entry of a plea of guilty or nolo contendere.

I understand that “affiliate” is defined by the statute 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.

**Please mark the appropriate paragraph below:**

Neither the proposer, contractor, nor any officer, director, executive, partner, shareholder, employee member or agent who is active in the management of the proposer or contractor nor any affiliate of the proposer or contractor has been convicted of a public entity crime subsequent to July 1, 1989.

\_\_\_\_\_ There has been a conviction of a public entity crime by the proposer or contractor, or an officer, director executive, partner, shareholder, employee, member or agent of the proposer or contractor who is active in the management of the proposer or contractor or an affiliate of the proposer 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 vendor list. The name of the convicted person or affiliate is \_\_\_\_\_.

A copy of the order of the Division of Administration Hearings is attached to this statement.

  
Proposer's Signature

Sworn to and subscribed before me on this 22 day of June, 20 15

(affix seal)

  
Notary Public Signature



NON-COLLUSION AFFIDAVIT

By submission of this affidavit, the proposer certifies that this proposal is made independently and free from collusion. Proposer shall disclose below, to the best of its knowledge, any Village of Estero officer or employee, or any spouse, son, daughter, stepson, stepdaughter, or parent of any such officer or employee, who is an officer or director of, or has a material interest in, the proposer's business who is in a position to influence the procurement. Any Village of Estero officer or employee who has any input into the writing of specifications or requirements, solicitation of offers, decision to award, evaluation of offers, or any other activity pertinent to this procurement is presumed, for purposes hereof, to be in a position to influence this procurement. For purposes hereof, a person has a material interest if he or she directly or indirectly owns more than five percent (5%) of the total assets or capital stock of any business entity, or if he or she otherwise stands to personally gain if the contract is awarded to this vendor.

NAME

RELATIONSHIPS

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

NONE: ✓

Candy D

Signature of Proposer

Sworn to and subscribed before me on this 22 day of June, 2015

(affix seal)

Abi Compton

Notary Public Signature

