

COLIN BAENZIGER & ASSOCIATES

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EXECUTIVE RECRUITING



**EXECUTIVE RECRUITMENT SERVICES FOR  
CITY ATTORNEY**

***Colin Baenziger & Associates***

**Project Manager and Contact Person:**

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

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



# PROPOSAL TO CONDUCT THE EXECUTIVE SEARCH FOR FORT PIERCE NEXT CITY ATTORNEY

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November 4, 2015

The Honorable Mayor Linda Hudson, Mayor and Commissioners Rufus J. Alexander, Edward Becht,  
Thomas K. Perona and Reginald B. Sessions

**ATTN: Robert J. Bradshaw, City Manager**

City of Fort Pierce  
100 N. U.S. Highway 1  
Fort Pierce, FL 34950

**RE: Proposal to Provide Recruitment Services for City Attorney**

Dear Mayor Hudson and Commissioners Alexander, Becht, Perona and Sessions:

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

CB&A is a national recruiting firm having conducted assignments from Florida to Washington and Maine to California with Virginia as one of our focus areas. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a good fit for your community. As a result, we only take a few clients at a time and focus on getting the job done properly. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and manager selection. We also offer the best warranty in the industry.

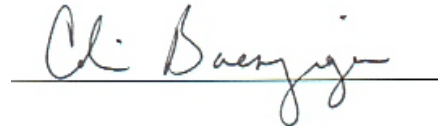
Not only do we offer unparalleled service at a reasonable price, we focus on finding just the right people for your organization. We say people, and not person, because our goal is to bring you five finalists who are so good that you will have a difficult time choosing among them. The proof is in the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

Some of our searches include the City Attorney for Roanoke, VA, the City Attorney and City Manager for West Melbourne, FL. We have found the City Manager for Scottsdale, AZ, the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia), the County Managers for Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Union County, NC; and York County, VA. We also found the City Managers for Ashland, KY, Ankeny, IA; Bellevue, WA; Fayetteville, NC; Destin, FL; Roanoke, VA; Tacoma, WA; Titusville, FL; and Winchester, VA.

Our current searches include, among others, the County Attorneys for Fulton County, GA, and Prince William County, VA, as well as Managers for Fort Myers and Orange City in Florida, Covington, and Danville, VA, Indianola, IA, Prosser, WA, Norwich, CT and the City Administrator for Fort Smith, AR. We are also seeking the Executive Director for Sun City Summerlin HOA in Las Vegas, NV, the Chief of Police for Mooresville, NC, and the Utility Director for Danville, VA.

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

Sincerely,

A handwritten signature in cursive script, reading "Colin Baenziger", is written over a horizontal line.

Colin Baenziger  
Principal / Owner

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## ***II. Colin Baenziger & Associates***

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### ***The Firm, Its Philosophy, & Its Experience***

Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL, with offices in Centerville, MD; Rhinelander, WI; and Richland, WA. As a sole proprietorship, we are not registered with any states as a corporation, foreign or otherwise. Although our primary focus is executive search, we are often involved in operational reviews of governmental operations. Our consultants live in other areas of the country and converge wherever the client's needs exist. We develop an operational plan prior to arrival and our team of experts quickly studies the issues, identifies problems and opportunities, performs the necessary analysis, develops solutions, prepares reports and action plans, and completes the assignment. The client receives prompt, professional service, and its needs are effectively addressed. We are available for follow-up work; however, our goal is to provide the client with solutions that its existing staff can implement without additional outside assistance.

Colin Baenziger & Associates' outstanding reputation is derived from our commitment to timeliness and quality. Our work is not done until you are satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our fee or in our action plan. We do not ask the client for additional fees. Rather, we accept these situations as part of our cost of doing business. We believe that once a contract is signed we have an obligation to fulfill its requirements excellently and within the budgeted amount.

Since beginning our search practice in 1998, we have conducted searches and other related work for clients in nineteen states. Overall our staff has performed over 150 City, County, and Special District Manager searches and approximately 200 local government searches. The basic approach we have presented herein is the approach we have used in each of our searches. It has been refined over the years to the point where it is problem-free.

### ***Technical Capabilities and Organizational Structure***

Colin Baenziger & Associates has developed its business model over the past 15 years. The model has proven to be extremely effective in every state where we have applied it and for every type of position for which we have searched. In fact, we are often called when a government has a particularly difficult position to fill or where one of our competitors has failed. Overall, we utilize approximately eighteen people. Most staff members are independent contractors and are given assignments on a task order basis. Consequently we can pay well while having a great deal of flexibility without the overhead of many firms. In addition to Mr. Baenziger, other senior staff members are former City and/or County Managers or elected officials. As a result, we understand multiple perspectives and have been very successful in identifying the right candidates for our clients. CB&A's other staff are all competent researchers and writers and most have been with us for a long time.

## ***II. Colin Baenziger & Associates (continued)***

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### ***Completion of Projects within Budget***

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

### ***Completion of Projects on Schedule***

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

### ***Diversity***

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the County. The proof is that from the beginning of 2009 through the end of 2011, forty-three percent of the individuals whom we placed as City and County Managers were minorities and/or women. In 2014 our placement percentage of women and minorities was also 43%.

### ***Prior Names and Litigation***

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

### ***Insurance***

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

### ***Overall Executive Search Experience***

CB&A started its executive search business in 1998 from scratch. As a single father, he needed to stay nearby and so his goal was to become Florida's preeminent recruiter. In 2007 with his children mature, he branched out into other states. His firm has now worked in 23 states, from Maine to California and Florida to Alaska. A complete list of our searches is contained in Appendix A

### ***III. Firm Experience and Capabilities***

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#### ***Search Firm Specialization***

100% of our work is now local government executive search and consequently, that is our practice. Between 2005 and 2014, general consulting accounted for approximately 2% of our revenue. When such work was undertaken, it was generally done by the principal and owner on an ad hoc basis. He no longer takes any assignments other than executive search. All the work on this effort will be conducted by other offices, the vast majority of which will be conducted by our offices in Florida and Wisconsin.

#### ***Why Hire CB&A?***

The primary reason is our outstanding track record for success. We started our business in 1998 from scratch. At the time our goal was to be the preeminent local government recruiting firm in Florida. It took a few years to become established but since 2005, we have performed 70% of the City and County Manager searches where a Florida government has utilized a recruiter. In other words, we have performed more than twice as many searches as all of our competitors combined. We have also now expanded into 23 other states. We do not advertise. Instead the reason is our performance and our reputation.

Achieving that reputation depends on many factors, all of which we excel at. We have a unique ability to assess a situation to determine who will be the best fit. We are able to both translate that into our recruiting material and in our assessment process. We outwork our competition in terms of finding people and we have a better network. We are flexible and work with our clients to make the search as success. We want your input and ideas as they will improve the process. We perform the best and most thorough background checks in the industry (see pages 7-8 for a description of what we do and Appendix D for a sample candidate report) and we do them before you determine your finalists. Our selection process is more complete than that of others. Our customer service is outstanding. As noted, you will have our cell phone numbers and will be expected to use them whenever you need or want to. Finally, our warranty is the best in industry. All of that leads to you getting the best candidates to choose from and to a successful placement.

## ***IV. Search Methodology***

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

### ***Phase I: Information Gathering and Needs Assessment***

#### ***Task One: Needs Assessment***

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

- Compile background information from the jurisdiction's website and other sources.
- Interview the City Commission, City Manager, and other key stakeholders. Our goal is to develop a strong sense of your organization, its leadership, its short and long term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will likely include experience, longevity, education, personality, demeanor, and achievements as well as other items the Commissioners and stakeholders consider important, and
- Determine a reasonable compensation package.

We will also finalize the timeline so candidates can mark their calendars well in advance and will be available when the Commission wishes to conduct the interviews.

As an aside, we are assuming the next City Attorney will need to be licensed to practice in Florida or be able to waive in. We do not believe recruiting someone who would have to sit for the Florida Bar Examination is a viable option.

#### ***Task Two: Develop Position Description and Recruitment Materials***

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

### ***Phase II: Recruitment***

#### ***Task Three: Recruit Candidates***

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

## ***IV. Search Methodology*** *(continued)*

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The approaches we use to find candidates are:

- ***Networking:*** The best approach is diligent outreach. We will network with our colleagues and consult our data base. We will also work closely with appropriate sections of the Florida Bar Association, the International Municipal Lawyers Association, and so on to identify highly skilled potential candidates. As we identify outstanding candidates (many of whom are not in the market), we will approach them and request that they apply. Often excellent candidates are reluctant to respond to advertisements because doing so may alienate their current employers. When we approach them, their credentials are enhanced rather than diminished. We will also utilize LinkedIn as a networking tool.
- ***Advertising*** While we will seek out the best, we will not ignore the trade press as it often also yields strong candidates. We intend to advertise with the Florida Bar Association, the American Bar Association and the International Municipal Lawyers Association. We will also post it on our website, [www.cb-asso.com](http://www.cb-asso.com) and appropriate legal job listing sites. We generally do not use newspapers or generic websites because, while they produce large numbers of applications, they generally do not produce the type of candidates our clients are seeking. In the past, the Florida Bar has also been very helpful in providing us with email addresses for its members in the relevant sections.
- ***Email:*** We will also e-mail the recruitment profile to our listserv of ten thousand managers and professionals who are interested in local government management. One of the advantages of e-mail is that if the recipient can easily forward the recruitment profile to someone who may be interested.

### ***Phase III: Screening and Finalist Selection***

#### ***Task Four: Evaluate the Candidates***

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

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

Specifically, our efforts will involve:

**Step One. Resume Review.** CB&A will evaluate all resumes and identify the eight to fifteen strong candidates. Some of these may be in-house candidates or individuals who have held high-level positions in other governments but who have never been the top Attorney. Often these people simply need the opportunity.

#### ***IV. Search Methodology*** *(continued)*

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

**Step Three. Candidate Materials and Background Investigations.** For those that remain in consideration, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to prepare a written introduction to themselves as part of their preliminary background checks. This is done for several reasons. First, it allows the candidates to tell their own story and balance the negativity that is so often characteristic of the press. It also allows the City to evaluate the candidates written and communicative skills.
- **Candidate Disclosure Statement:** We will ask candidates if there is anything controversial in their background that we should be made aware of prior to further consideration. While it is unlikely that we find anything not previously publicized in the press, we believe redundant checks offer superior security for our client.
- **Interviews of References:** We tell the candidate with whom we wish to speak. These include current and former Board/Commission/Council Members, the fellow attorneys, staff members, news media representatives, the director of the local chamber of commerce, community activists, and others who know the candidate. We also attempt to contact some individuals who are not on the candidate's list. Typically we reach eight to ten people and prepare a written summary of each conversation.
- **Legal Checks:** Through our third party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state and national level; civil records for any litigation at the county and federal level; and bankruptcy and credit.
- **Search the Internet and Newspaper Archives:** Virtually every local newspaper has an archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the elected officials. Of course, not all news sources are unbiased and we consider that in our evaluation. This step is conducted in order to quickly discover candidates with problems in their backgrounds and eliminate them.
- **Verification of Education:** We also verify claimed educational degrees to assure the candidate is being totally forthright.

## ***IV. Search Methodology*** *(continued)*

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- **Verification of Work History:** We verify employment for the past fifteen years.

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

### ***Task Five: Preparation and Presentation of Candidate Materials***

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

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

### ***Task Six: Finalist Selection***

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

We will then notify the selected finalists of their status and schedule the interviews with the Commission.

### ***Task Seven: Notify All Candidates of Their Status***

We will notify the selected candidates by telephone and give them the opportunity to ask additional questions. CB&A will also contact those not selected to advise them of their status. Part of the notification will include advice concerning the candidates' resume and/or cover letter so, even though they were not selected to go forward, they will have gained something valuable from participating in the process.

## ***IV. Search Methodology (continued)***

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### ***Phase IV: Coordinate the Interview Process and City Attorney Selection***

#### ***Task Eight: Coordinate the Candidate Assessment Process***

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

**Day #1:** The finalists are given a tour of the community and its facilities by a knowledgeable staff member. Later, senior staff members meet briefly with the candidates. This opportunity allows the finalists to ask questions and the senior staff to assess the candidates.

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

**Day #2:** Beginning at approximately 8:30 a.m., each candidate interviews individually with each elected official for approximately 40 minutes. These meetings provide the Commissioners with an opportunity to assess how the candidates might interact with them on an individual basis. It is very important to know if good chemistry exists. Ultimately, the Attorneys succeed and fail based on their interaction with the Commissioners and the one-on-one interviews are an excellent way to test that interaction.

After lunch, the Commissioners and their designees as a group will interview each candidate so that they can assess the candidates in a formal meeting. Part of the interviews may include a case study presentation so the Commission can observe the candidates' presentational skills.

#### ***Task Nine: Debriefing and Selection***

Once the interviews have concluded, CB&A suggests the Commissioners recess and resume meeting a few days later to select the City Attorney. Although the selection can be made the same day, CB&A feels it is better to take the time to consider the decision and get feedback from others.

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

## ***IV. Search Methodology*** *(continued)*

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### ***Phase V: Negotiation and Continuing Assistance***

#### ***Task Ten: Notification, Contract Negotiations and Warranty***

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

#### ***Task Eleven: Continuing Assistance***

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

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

#### ***The City's Obligations***

The City will be responsible for providing approximately 20 high quality images for the recruitment brochure, facilities for the interview process, coordinating lodging for candidates from outside the area, and making arrangements for the reception. The City will also be responsible for reimbursing the candidates for all expenses associated with their travel, meals, and incidentals for the interview weekend.

## ***IV. Search Methodology (continued)***

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The following is the schedule we would suggest and assumes CB&A is selected to perform by November 16<sup>th</sup>.

### ***Phase I: Needs Assessment / Information Gathering***

- November 23<sup>rd</sup>: CB&A begins working with the City Commission and City Manager and other stakeholders to understand the job and its challenges
- December 1<sup>st</sup>: CB&A submits the draft of the full recruitment profile to the City for its review. Comments will be due back by December 8<sup>th</sup>.

### ***Phase II: Recruiting***

- December 14<sup>th</sup>: CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to over 12,500 local government managers and professionals.
- January 8<sup>th</sup>: Closing date for submission of applications.
- January 13<sup>th</sup>: CB&A reports the results of the recruitment to the City.

### ***Phase III: Screening, Reference Checks and Credential Verification***

- February 8<sup>th</sup>: CB&A forwards complete semi-finalist material electronically to the City.
- February 15<sup>th</sup>: City selects finalists.

### ***Phase IV: Interview Process Coordination and City Attorney Selection***

- February 25<sup>th</sup>: County holds reception for the finalists.
- February 26<sup>th</sup>: One-on-one and full Commission Interviews as well as possible selection.
- February 29<sup>th</sup>: City selects its next City Attorney if it has not already done so.

### ***Phase V: Negotiation, Warranty & Continuing Assistance***

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

## ***V. Project Team Qualifications and Experience***

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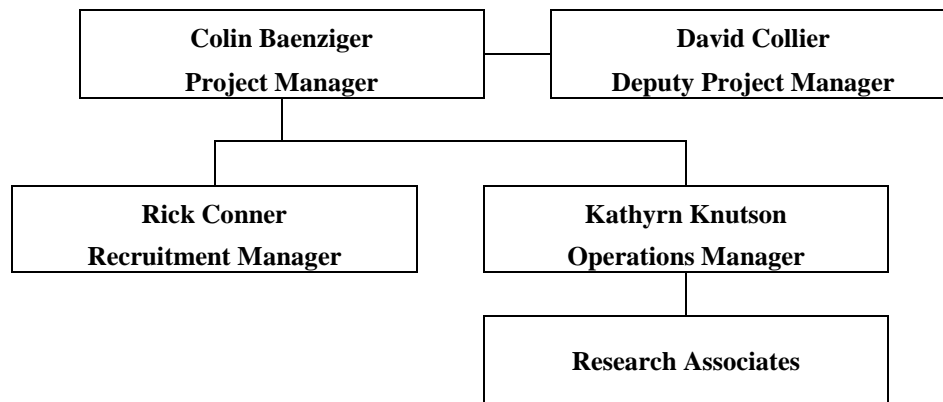
### ***Project Team and Involvement***

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

David Collier, senior vice president, will be the Deputy Project Manager and support for Mr. Baenziger. Mr. Collier will assist in virtually every aspect of the search effort and prepared to step in if needed. Before joining CB&A, he had over 30 years of experience as a senior level local government manager in several states and in that capacity hired many key staff. He earned his Bachelor of Arts degree in economics and his Master’s degree in public administration from the American University in Washington, D.C. He is a past president of the Maryland City Managers Association and the Florida Association of County Administrators.

Rick Conner, vice president, will serve as the recruitment manager and assist with the identification and screening of candidates. He has over 30 years of in local government and in executive recruiting. He earned Bachelors of Science Degrees in Business Administration and Engineering from the University of Missouri.

Kathryn Knutson, Vice President for Operations, will be responsible for coordinating the advertising and production of the materials we will present to you as described in the Recruitment Approach.



**Note:** Colin Baenziger & Associates does not track its time and expenses on a project basis. Rather we have determined over the years the fee we need to charge in order to make a modest profit. When we did track costs on a project basis, we found it created an incentive to sacrifice quality in order to meet budget. Hence we cannot provide an estimate of staff hours or expenses.

## ***V. Project Team Qualifications and Experience*** (continued)

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### ***Colin Baenziger, M.P.A.***

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#### **Principal**

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



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

- City Attorney, Roanoke, VA,
- City Attorney, West Melbourne, FL,
- City Manager, Cottonwood Heights, UT,
- City Manager, Fayetteville, NC,
- Village Manager, Key Biscayne, FL,
- Economic Development Director, Loudoun County, VA,
- Community Development Director, Miami, FL,
- Borough Manager, Matanuska-Susitna Borough, Alaska,
- City Manager, Mount Dora, FL,
- County Manager, Clackamas County, OR,
- City Manager, Palm Coast, FL,
- City Manager, Roanoke, VA,
- City Manager, Tacoma, WA,
- General Manager, Tampa Bay Water Authority, and
- County Manager, Union County, NC,

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

Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association. He has also been called upon frequently to speak at conferences of the Utah and Florida City/County Managers' Associations, and the Florida Public Personnel Association. He founded the firm in 1997 and has owned and operated it since then.

## ***V. Project Team Qualifications and Experience*** (continued)

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### ***Dave Collier, M.P.A.***

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#### **Senior Vice President**

Before joining CB&A in 2006, Dave Collier spent over 30 years of management experience in county and city government. Since there is not much that he has not seen previously, Dave quickly produces efficient and effective solutions to problems for his clients.

One of Dave's specialties is executive search. With his many years of experience, he can quickly separate the wheat from the chaff and find the right person to join your senior staff or be your department head. He also has successfully conducted organizational reviews, sessions in team building and strategic planning workshops. Just as importantly in this day and age of the pressure to lower taxes, he has developed strategies and action plans for coping with the tough financial problems that local government often experience.



Dave has overseen the recruitment and selection of:

- County Manager, Brevard County, FL,
- City Manager, Coral Gables, FL,
- City Manager, Cape Canaveral, FL,
- City Manager, Dania Beach, FL,
- City Manager, North Miami, FL,
- City Manager, Orange City, FL,
- City Manager, West Melbourne, FL,
- City Administrator, West Park, FL,
- Finance Director for Tamarac, FL, and
- Environmental Resources Director for St. Lucie County, FL.

While serving as City Manager of Stuart, Florida for 14 years, he improved the professionalism of City Department Heads and staff through an emphasis on professional development and team building. He also used his hands-on management style to emphasize the need for effective project management and maintaining tight timelines in order to show citizens that the city government was effectively managed and had a strong commitment to its customers. Prior serving in Stuart, Dave was a County Manager in Florida, Kansas and Michigan. He also has extensive experience in local government consulting.

Mr. Collier earned his Bachelor of Arts degree in Economics and his Master's degree in Public Administration from the American University in Washington, D.C. He was a member of the International City/ County Management for over thirty years, served as President of the Maryland City Managers Association and the Florida Association of County Administrators. Mr. Collier is involved in his community as a member of the City of Stuart's CRA Advisory Board and as a Director of Stuart's Main Street Association. He has been with the firm since 2006.

## ***V. Project Team Qualifications and Experience*** (continued)

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### ***Rick Conner, P.E.***

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**Vice President**

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



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

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

- City Manager of Sunny Isles Beach, Florida,
- City Manager of Portland, Texas,
- City Manager of Marble Falls, Texas,
- Public Works Director of Nashville/Davidson County, Tennessee, and
- Public Works Director of Bryan, Texas

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

- City Manager, Fayetteville, NC,
- City Manager, Sarasota, FL,
- City Manager, Cocoa Beach, FL
- Chief Executive Officer/General Manager, Des Moines (IA) Water Works,
- Finance Director/Procurement Officer for a bedroom community to Corpus Christie, TX,
- Accounting Director for a medium size West Texas city
- Police Chief for a Florida barrier island community,
- Water and Wastewater Director for a medium size, central Texas city,
- Airport Fixed Base Operator for a Texas university community, and
- Airport Manager for a medium size Texas university city.

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

## ***V. Project Team Qualifications and Experience*** (continued)

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### ***Kathryn Knutson***

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#### **Vice President for Operations**

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



Since beginning her working relationship as a subcontractor with Colin Baenziger & Associates, Ms. Knutson has been involved in virtually every executive search the firm has conducted. Some of the more notable searches include:

- City Attorney, Roanoke, VA,
- City Attorney, West Melbourne, FL,
- City Manager, Ankeny, IA,
- City Manager, Bellevue, WA,
- City Manager, Cottonwood Heights, UT,
- City Manager, Cutler Bay, FL,
- City Manager, Greensboro, NC,
- City Manager, Homestead, FL,
- City Manager, City of Marathon, FL,
- Village Manager, Village of Palmetto Bay, FL,
- City Manager, Portland, ME, and
- City Manager, Winchester, VA.

As noted, a major part of Ms. Knutson's work has been on special projects. For example, she is responsible for the firm's annual City Manager compensation survey and also has worked with Palm Beach County Water Utilities reviewing a portion of its billing database. The utility's concern was possible under-billing, and our work involved a review of billing records for reasonableness and consistency, as well as extensive work in the field. Thanks to Ms. Knutson's work, the Utility recovered our fee several times over.

Ms. Knutson's prior employment includes stints with Palm Beach County's Department of Building, Planning, and Zoning, and with the County Health and Rehabilitative Services. She has also worked with the State of Florida's Department of Corrections and with the State's Department of Employment Services. She has also been involved with a number of private and non-profit concerns, such as the Visiting Nurses Association and Oakwood Mental Health Center of the Palm Beaches. Ms. Knutson has an associate's degree in business education from West Georgia College in Carrollton, Georgia. She has been with the firm since 2002.

## ***VI. References***

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### ***Local Government Attorney – Past Searches***

Note: In each case, the jurisdiction hired its top choice.

#### ***City Attorney, City of Roanoke, VA (population 96,000).***

**Contact:** Council Member Court Rosen at  
(540) 420-3473, or [crozen@smithpackett.com](mailto:crozen@smithpackett.com)  
City Clerk Stephanie Moon at (540) 853-2541 or  
[Stephanie Moon@roanokeva.gov](mailto:Stephanie.Moon@roanokeva.gov)  
215 Church Avenue, SW  
Roanoke, VA 24011-1517



CB&A was hired in early March 2012 to find Roanoke's next **City Attorney**. Roanoke is the cultural and commercial hub of southwestern Virginia. One of its primary employers is the Carilion Clinic with almost 8,000 employees. We were asked to identify someone who was sound legally but also creative and who could practice law in Virginia without sitting for the Bar examination. We quickly realized that any attorney admitted to practice law before the court of last resort in any other state, could waive in and practice law in Virginia. That permitted us to conduct a nationwide search and consider a reasonably broad range of applicants. Our efforts involved searching the country for strong candidates, conducting extensive background checks, recommending a strong field of candidates, overseeing the interviews and providing a small amount of assistance with the contract negotiations. *Daniel Callaghan, a shareholder with Devine, Millimet & Branch of Manchester, NH*, was selected in July 2012. He spent several months wrapping up his practice and began work and was admitted to the Virginia Bar in October 2012. We have since helped recruit the **City Manager, Finance Director, Human Resources Director, Planning Director and Economic Development Director**.

#### ***City Attorney, City of West Melbourne (population 15,000)***

**Contact:** Mayor Hal Rose at 321-795-2164  
2240 Minton Road  
West Melbourne, FL 32904



CB&A was retained in late March, 2008, to assist the City in finding a City Attorney. The City had previously conducted its own search and the results had been less than satisfactory. Within a month of the new attorney beginning work, the City learned of several significant issues in the individual's past and terminated the contract on a four to three vote. Emotions were high when we arrived and began our work. Given the City Attorney's position highly specific requirements, (such as being licensed to practice in Florida and membership in the U.S. District Court for the Middle District of Florida Bar) we focused our efforts on recruiting Florida attorneys. We conducted an extensive outreach effort that included telephone calls, advertising and e-mail. A major portion of our effort included working with the Florida Bar and using a list of its members in relevant sections (local

## ***VI. References (continued)***

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government, personnel and labor relations, growth management and environmental) to reach out to likely candidates. Upon our initial review, we determined twelve candidates were highly qualified and began our background checks. Six were eliminated very quickly due to issues we found in our Internet and newspaper archive searches. The remainder proved to be solid candidates and were interviewed by the City. Ultimately, *James P. Wilson*, who had served as the City of St. Augustine's City Attorney from 1995 to 2007 was selected. The City was so pleased with our work that it will be passing a resolution thanking us for our outstanding efforts on the City's behalf at its July 1, 2008 meeting.

### ***County Attorney, Fulton County, GA (population 992,000)***

**Contact:** Mark Massey at (404) 612-8232 or [Mark.Massey@fultoncountyga.gov](mailto:Mark.Massey@fultoncountyga.gov)  
Fulton County Clerk to the Commission  
141 Pryor Street SW  
Atlanta, GA 30303

We have virtually all our work on this assignment. We are waiting for the County to provide us with interview dates for the finalists. We also assisted the County with its County Manager Search, however, and Mr. Massey is very familiar with our work.

### **Candidate References**

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

<b>Placement</b>	<b>Formerly</b>	<b>Recruited To Be</b>	<b>Contact at</b>
Kristen Denne	City Manager Johnstown, PA	Township Manager Springettsbury Township, PA Appointed August 2014	(717) 757-3521 <a href="mailto:kristen.denne@springettsbury.com">kristen.denne@springettsbury.com</a>
Eden Freeman	Assistant City Manager Sandy Springs, GA	City Manager Winchester, VA Appointed June, 2014	(540) 667-1815 <a href="mailto:citymanager@winchesterva.gov">citymanager@winchesterva.gov</a>
Bryan Hill	Deputy County Administrator Beaufort County, SC	County Administrator James City County, VA Appointed July 2014	(757) 253-6604 <a href="mailto:bryan.hill@jamescitycountyva.gov">bryan.hill@jamescitycountyva.gov</a>

## ***Section VII. Fee & Warranty***

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### **Fee**

CB&A offers a firm, fixed fee of \$24,750 *which includes all our expenses and costs*. In other words, the only thing the City will pay CB&A is the agreed upon fee. The only other costs the City will be responsible for are those associated with the candidates' travel, accommodations and meals for the interview process. The advantage to the City is it knows exactly what it will pay. The advantage to CB&A is that we do not have to keep track of every minor expense.

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

<b>City Attorney Search</b>	
<b>Phase I:</b> Needs Analysis / Information Gathering	\$ 3,250
<b>Phase II:</b> Recruiting	10,000
<b>Phase III:</b> Screening and Warranty	8,000
<b>Phase IV:</b> Interview Process Coordination and Attorney Selection	1,750
<b>Phase V:</b> Negotiation and Continuing Assistance	1,750

If the City asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of \$150 per hour. Please note that we have neither billed nor requested additional funds beyond our originally quoted fee even when we have been entitled to it.

As noted earlier, Colin Baenziger & Associates does not track its time and expenses on a project basis. Rather we have determined over the years the fee we need to charge in order to make a modest profit. When we did track costs, we found it created an incentive to sacrifice quality in order to meet budget. Hence we cannot provide an estimate of staff hours or expenses.

We also do not use subcontractors nor, as indicated above are there any reimbursable costs.

### **Warranty**

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

- 1) We will not approach the selected candidate for any other position as long as the individual is employed by the City.
- 2) If the selected individual leaves for any reason other than an Act of God (such as total incapacitation or death) in the first year, CB&A will repeat the search at no charge for our services or expenses. If the individual leaves for any reason other than an Act of God in the second year, CB&A will repeat the search for the cost of our expenses only.
- 3) If you are not satisfied with the candidates we present, CB&A will repeat the search until you are satisfied.
- 4) Our price is guaranteed and will not be exceeded for any reason, even if conditions change after the contract is executed.