

THE CITY OF NEW SMYRNA BEACH - HUMAN RESOURCES

CONSIDER THE APPROVAL OF STRATEGIC GOVERNMENT RESOURCES, INC. CONTRACT FOR EXECUTIVE SEARCH FIRM.

January 23, 2024

Background:

On January 10, 2024, four firms made presentations to the Commission in reference to RFP02-24-HR Executive Search Firm for City Manager. Firms were allotted thirty minutes for presentation and questions from the Commission. Presentations were made by:

- Colin Baenziger, President, Colin Baenziger & Associates
- Doug Thomas, Executive Vice President of Recruitment & Leadership Development, Strategic Government Resources, Inc.
- Jim Dinneen, President, GovHRUSA, LLC
- Bob Slavin, President and Barbara Lipscomb, Managing Consultant, Slavin Management Consultants

Commission discussion followed each presentation. After all presentations, the Commission asked questions of the review committee, City Clerk, and City Manager in regards to the presentations. Mayor Cleveland opened the floor for nominations to award contract. Strategic Government Resources and Slavin Management Consultants received nominations. After a ballot vote, the Commission awarded selection and contract for an executive search firm to Strategic Government Resources, Inc. (SGR).

SGR will conduct an executive search for City Manager as per their initial proposal (attached). Staff recommends approval of the contract in reference.

Fiscal Analysis:

Not to exceed cost: \$27,900

Details of not to exceed cost:

Fixed fee \$25,400

\$2,500 ad placements (billed at actual costs)

\$50,000 was budgeted in FY24 for this purpose. Costs associated with this contract will be significantly less. Additional funds will be required for candidate travel and open house, if desired, but are not expected to reach the full budgeted amount.

Strategic Plan Item:

No

Staff Report Created By: Heather Kidd - Director of Human Resources

Attachments:

2 PROPOSAL STRATEGIC GOVERNMENT RESOURCES PROPOSAL COMBINED.pdf
01-10-24 Special.pdf
Strategic Government Resources contract v2 (signed by SGR).pdf

PROPOSAL FOR EXECUTIVE RECRUITMENT SERVICES

**City Manager
New Smyrna Beach, Florida**

November 29, 2023

This proposal is valid for 180 days

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

JJ Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com



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November 29, 2023

Hon. Mayor Fred Cleveland and City Commission
City of New Smyrna Beach, Florida

Dear Mayor Cleveland and Commissioners,

Thank you for the opportunity to submit this proposal to assist the City of New Smyrna Beach in your recruitment for a new City Manager. At SGR, we take pride in our unique ability to provide personalized and comprehensive recruitment services to meet your specific needs.

We would like to highlight some key aspects that set SGR apart from other recruitment firms and enable us to reach the most extensive and diverse pool of applicants available:

- SGR is a recognized thought leader in local government management and is actively engaged in local government operations, issues, and best management practices.
- SGR has conducted executive recruitments for over 450 local government clients in 37 states, and we value the long-term relationships we have developed with many of our clients who continue to partner with us on future recruitment needs.
- We have a broad community of over 15,000 followers on LinkedIn, one platform we utilize to connect with a wide range of active and passive candidates across the nation.
- Our Servant Leadership e-newsletter, with a subscriber base of over 40,000 in all 50 states, announces all SGR recruitments, further extending our reach. Your position will also be posted on SGR's website and our Job Board.
- In addition, SGR sends targeted emails to our opt-in Job Alert subscriber database including over 5,000 city management professionals.
- SGR's Executive Vice President Doug Thomas would be the recruiter for this search. Doug has nearly 35 years of senior local government management experience and is the former City Manager of Lakeland, Florida. He has extensive experience recruiting city management positions for Florida municipalities, and his full bio can be viewed in the Project Personnel section of this proposal. Doug would be available to start the recruitment process after January 1st of 2024.
- SGR's proposal is in all respects fair and in good faith without collusion or fraud. I am the representative authorized to bind the firm.

We are enthusiastic about the prospect of conducting this recruitment for the City of New Smyrna Beach, and we are available to schedule a meeting at your convenience to discuss further.

Respectfully submitted,

Jeri J. Peters, President of Executive Recruitment
JJPeters@GovernmentResource.com

About SGR

Strategic Government Resources, Inc. (SGR) exists to help local governments become more successful by recruiting, assessing, and developing innovative, collaborative, and authentic leaders. SGR was incorporated in Texas in 2002 with the mission to facilitate innovative leadership in local government. SGR is fully owned by former City Manager Ron Holifield, who spent two high-profile decades in city management and served as a City Manager in several cities.

SGR's business model is truly unique. Although we are a private company, SGR operates like a local government association. Most of SGR's principals are former local government officials, allowing SGR to bring a perspective and depth of local government expertise to every project that no other firm can match.

SGR's Core Values are Customer Service, Integrity, Philanthropy, Continuous Improvement, Agility, Collaboration, Protecting Relationships, and the Golden Rule.

SGR is a full-service firm, specializing in providing solutions for local governments in the areas of recruitment and retention, leadership development and training, innovation and future readiness, and everything in between.

With 31 full-time employees, 1 part-time employee, 21 recruiters, 20 facilitators, and multiple consultants who function as subject matter experts on a variety of projects, SGR offers comprehensive expertise.

The company operates as a fully remote organization, with team members located in Texas, California, Colorado, Florida, Minnesota, Montana, New York, North Carolina, Ohio, Oklahoma, Oregon, and Utah.

View all SGR team members and their bios at: <https://sgr.pub/MeetTeamSGR>.

Project Personnel

Doug Thomas, Executive Vice President

DouglasThomas@GovernmentResource.com

Cell: 863-860-9314



Doug has close to 35 years of senior local government executive management experience. He joined Strategic Government Resources (SGR) in 2015 to serve as their first Regional Director to serve both Florida and the southeast, and subsequently as Executive Vice President. He assists clients nationwide in the areas of executive recruitment, governing body/senior staff governance and servant leadership training, strategic visioning, and priority-based budgeting, evaluation of the Chief Executive, and is a regular speaker at local government state and national conferences.

Prior to his work with SGR, Doug served as City Manager for the City of Lakeland, Florida for roughly 12 years. Lakeland is centrally located along the I-4 corridor between Tampa and Orlando with a resident population of over 100,000 and a service population of over 250,000. The City provides its residents a full array of municipal services, including a municipal-owned electric generation and distribution utility that is the 3rd largest in the state and among the top 25 nationwide. The organization has an annual budget of approximately \$600 million and employs roughly 2,500 personnel. The city is home to the Detroit Tigers during Major League Baseball's Spring Training; the Experimental Aircraft Association's Annual Sun 'n Fun Fly-in, recognized as America's second largest aviation event of its type; Florida Southern College, which features the world's largest one-site collection of buildings designed by the legendary architect, Frank Lloyd Wright; and the state's 12th university, Florida Polytechnic University, which opened in the fall of 2014.

Prior to Lakeland, Doug previously served as City Manager for the City of Alma, Michigan for close to 15 years. Prior to his service in Alma, he represented the City of Grand Haven, Michigan as Assistant City Manager, (1986-1989) and as Administrative Assistant to the City Manager (1984-1985). He also has held local government posts with the City of Rockville, Maryland, and the Town of Landover Hills, Maryland.

His academic credentials include attainment of a Master of Public Administration from the American University, Washington, D.C. in 1983 with a concentration in Urban Affairs, and a Bachelor of Arts in Political Science and History from Bowling Green State University, Ohio in 1981.

SGR's Unique Qualifications

Extensive Network of Prospects

SGR is intent on being a leader in executive recruitment and firmly believes in the importance of proactively building a workforce that reflects the diversity of the communities we serve. We leverage an extensive and diverse network to reach potential applicants.

- Your position will be announced in SGR's Servant Leadership e-newsletter, which reaches over 40,000 subscribers across all 50 states.
- We will send targeted emails to over 5,000 opt-in subscribers of SGR's City Management Job Alerts.
- Your position will appear on SGR's Website, <https://sgr.pub/SGRWebsite>, which attracts approximately 20,000 visitors per month.
- Your position will be posted on SGR's Job Board, <https://sgr.pub/SGRJobBoard>, which typically has over 2,000 job listings at any given time and receives approximately 16,000 unique visitors per month.
- SGR implements a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page.
- We frequently collaborate with various local government associations, including the League of Women in Government, Alliance for Innovation, and the National Forum for Black Public Administrators.
- Approximately 65% of semifinalists selected by our clients learn about open recruitments through our website, servant leadership e-newsletter, job board, job alert emails, social media, or personal contact.

Collective Local Government Experience

Our recruiters have decades of experience in local government, as well as regional and national networks of relationships. Our executive recruiters leverage the professional networks of all SGR recruiters when recruiting for a position, enabling outreach to a wide and diverse array of prospective applicants. SGR team members are active on a national basis in local government organizations and professional associations. Many SGR team members frequently speak and/or write on issues of interest to local government executives. SGR can navigate relevant networks as both peers and insiders.

Listening to Your Unique Needs

SGR devotes significant time to actively listening to your organization and helping you define and articulate your needs. We work diligently to conduct a comprehensive recruitment process tailored specifically to your organization. SGR dedicates a prodigious amount of energy to understanding your organization's unique culture, environment, and local issues to ensure an alignment in terms of values, philosophy, and management style perspectives.

While we have established systems for achieving success, we are a “boutique” firm capable of adapting to meet a client's specific needs and providing insights on the pros and cons of their preferred approach.

Trust of Candidates

SGR has a track record of providing remarkable confidentiality and wise counsel to candidates and next-generation leaders, earning their trust. As a result, we can bring exceptional prospects to the applicant pool. Candidates trust SGR to assess the situation accurately, communicate honestly, and maintain their confidentiality to the greatest extent possible.

Accessibility and Communication

Your executive recruiter will keep you informed of the search status and will be readily accessible throughout the recruitment process. Candidates and clients can reach the recruiter at any time via cell phone or email. Additionally, the recruiter maintains communication with active applicants, ensuring they are well-informed about the community and the opportunity.

Comprehensive Evaluation and Vetting of Candidates

SGR offers a comprehensive screening process designed to ensure a thorough understanding of candidate backgrounds and to minimize surprises. Our vetting process includes the following key components:

- Prescreening questions and technical review of resumes
- Cross-communication among our recruiters regarding candidates who have been involved in previous searches, providing greater insight into their background and skills.
- Written questionnaires to gain insights beyond what is available through a resume.
- Recorded one-way semifinalist interviews.
- All-inclusive media reports that far surpass automated Google/LexisNexis searches, tailored to each candidate based on their previous places of residence and work.
- Thorough, automated, and anonymous reference checks that provide feedback on candidates from a well-rounded group of references.
- Background checks completed by a licensed private investigation firm.

Executive Recruitment Clients

SGR has partnered on executive recruitments with more than 450 local government clients in 37 states. We take great pride in the long-term relationships we have developed with many of our clients who continue to partner with us on future recruitment needs.

View a full list of our Executive Recruitment Clients at: <https://sgr.pub/ERClientList>.

Diversity, Equity, & Inclusion in Recruitments

SGR is deeply committed to equal employment opportunity and considers it an ethical imperative. We unequivocally reject any form of bias, expecting that candidates be assessed solely based on their ability to perform the job. Encouraging underrepresented demographic groups to apply is a vital aspect of our commitment. While we cannot guarantee the composition of semifinalist or finalist groups, SGR actively fosters relationships and contacts on a national scale to ensure meaningful participation of underrepresented groups. Our recruitment process is consistently evaluated and refined to incorporate a focus on equity and inclusion.

Statistics are a testament to our commitment to diversity and inclusion. In our 2022 placements, 32% of candidates were female and 20.5% indicated they were a person of color. Within SGR, our team of six executives includes three women and one person of color, and 72% of SGR's staff members are women. Our internal hiring practices are designed to attract diverse talent from various backgrounds and experiences. We understand the importance of words, ensuring our recruitment materials are inclusive and reflect an equity-focused perspective.

We also actively recommend advertising placements to attract a diverse applicant pool, leveraging partnerships with organizations such as the League of Women in Government, the Local Government Hispanic Network, and the National Forum of Black Public Administrators. Tracking candidate demographic data helps us proactively recruit traditionally underrepresented candidates for senior management positions in local government. We welcome feedback from our clients and candidates, using post-recruitment surveys to refine our processes and outcomes.

City & County Management Recruitments, 2018-Present

In Progress

- Cleburne, Texas (pop. 33,000) - City Manager
- Coffeyville, Kansas (pop. 9,000) - City Manager
- Duncan, Oklahoma (pop. 23,000) - City Manager
- DuPont, Washington (pop. 10,000) - City Administrator
- Edwardsville, Kansas (pop. 4,700) - City Manager
- Kilgore, Texas (pop. 14,000) - City Manager
- Lafayette, Colorado (pop. 30,000) - City Administrator
- Leander, Texas (pop. 67,000) - City Manager
- Marysville, Kansas (pop. 3,500) - City Administrator
- Moberly, Missouri (pop. 14,000) - City Manager

2023

- Camp Verde, Arizona (pop. 12,000) - Town Manager
- Bristol, Tennessee (pop. 27,000) - City Manager
- Dobbs Ferry, New York (pop. 11,000) - Village Administrator
- Gatesville, Texas (pop. 16,000) - City Manager
- Glastonbury, Connecticut (pop. 35,000) - Town Manager
- Great Bend, Kansas (pop. 15,000) - City Administrator
- Justin, Texas (pop. 5,000) - City Manager
- Laredo, Texas (pop. 256,000) - City Manager
- Largo, Florida (pop. 84,000) - City Manager
- Lawton, Oklahoma (pop. 90,000) - City Manager
- Mexia, Texas (pop. 7,000) - City Manager
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Navajo County, Arizona (pop. 106,000) - County Manager
- Ottawa, Kansas (pop. 12,500) - City Manager
- Parker, Arizona (pop. 3,500) - Town Manager
- Rowlett, Texas (pop. 68,000) - City Manager
- Shawnee, Kansas (pop. 69,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Snyder, Texas (pop. 11,000) - City Manager
- Stillwater, Oklahoma (pop. 48,000) - City Manager
- Trophy Club, Texas (pop. 13,000) - Town Manager
- Williston, North Dakota (pop. 29,000) - City Administrator

2022

- Aledo, Texas (pop. 5,500) - City Manager
- Blaine, Washington (pop. 6,000) - City Manager
- Crandall, Texas (pop. 4,000) - City Manager
- Dalhart, Texas (pop. 8,500) - City Manager
- Edinburg, Texas (pop. 100,000) - City Manager
- Frisco, Colorado (pop. 3,000) - Town Manager
- Graham, Texas (pop. 8,000) - City Manager
- Hutto, Texas (pop. 40,000) - City Manager
- Johnston, Iowa (pop. 24,000) - City Administrator
- Kennebunk, Maine (pop. 11,000) - Town Manager
- Kennedale, Texas (pop. 9,000) - City Manager
- Ketchikan, Alaska (pop. 8,000) - City Manager/Public Utilities General Manager
- Klamath Falls, Oregon (pop. 22,000) - City Manager
- Leawood, Kansas (pop. 34,000) - City Administrator
- Levelland, Texas (pop. 14,000) - City Manager
- Live Oak, Texas (pop. 16,000) - City Manager
- Madisonville, Texas (pop. 4,500) - City Manager
- Manor, Texas (pop. 15,000) - City Manager
- Marshall, Texas (pop. 23,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Mont Belvieu, Texas (pop. 8,000) - City Manager
- Montgomery, Texas (pop. 2,400) - City Administrator
- Nassau Bay, Texas (pop. 5,000) - City Manager
- Parkville, Missouri (pop. 7,000) - City Administrator
- Rocky Hill, Connecticut (pop. 21,000) - Town Manager
- Sunnyvale, Texas (pop. 8,000) - Town Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Walla Walla, Washington (pop. 34,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator
- Wethersfield, Connecticut (pop. 26,000) - Town Manager
- Wickenburg, Arizona (pop. 7,500) - Town Manager

2021

- Bainbridge Island, Washington (pop. 25,000) - City Manager
- Breckenridge, Texas (pop. 5,000) - City Manager
- Bridgeport, Texas (pop. 6,500) - City Manager

- Briarcliff Manor, New York (pop. 8,000) - Village Manager
- Chandler, Arizona (pop. 270,000) - City Manager
- Chanhassen, Minnesota (pop. 27,000) - City Manager
- Chickasha, Oklahoma (pop. 16,000) - City Manager
- Choctaw, Oklahoma (pop. 12,000) - City Manager
- Clermont, Florida (pop. 44,000) - City Manager
- Flower Mound, Texas (pop. 79,000) - Town Manager
- Johnson City, Tennessee (pop. 65,000) - City Manager
- Kennett Square, Pennsylvania (pop. 6,000) - Borough Manager
- Lago Vista, Texas (pop. 8,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator
- Monett, Missouri (pop. 9,000) - City Administrator
- North Port, Florida (pop. 77,000) - City Manager
- Port Chester, New York (pop. 30,000) - Village Manager
- Sherwood, Oregon (pop. 20,000) - City Manager
- Snoqualmie, Washington (pop. 14,000) - City Administrator
- Spokane, Washington (pop. 220,000) - City Administrator

2020

- Argyle, Texas (pop. 4,000) - Town Administrator
- Bay City, Texas (pop. 17,000) - City Manager
- Bedford, Texas (pop. 49,000) - City Manager
- Boerne, Texas (pop. 16,000) - City Manager
- Castroville, Texas (pop. 3,000) - City Administrator
- Clinton, Connecticut (pop. 13,500) - Town Manager
- Commerce, Texas (pop. 9,000) - City Manager
- Covington, Georgia (pop. 14,000) - City Manager
- DeSoto, Texas (pop. 56,000) - City Manager
- Duncanville, Texas (pop. 40,000) - City Manager
- Hutchinson, Kansas (pop. 42,000) - City Manager
- Hutto, Texas (pop. 30,000) - City Manager
- Iola, Kansas (pop. 5,500) - City Administrator
- Johns Creek, Georgia (pop. 84,000) - City Manager
- Joplin, Missouri (pop. 50,000) - City Manager
- Miami, Oklahoma (pop. 13,500) - City Manager
- Mission Hills, Kansas (pop. 3,500) - City Administrator
- Nacogdoches, Texas (pop. 33,000) - City Manager
- Santa Fe, Texas (pop. 13,000) - City Manager

- Tigard, Oregon (pop. 53,000) - City Manager
- Westworth Village, Texas (pop. 3,000) - City Administrator

2019

- Blaine, Minnesota (pop. 65,000) - City Manager
- Bullard, Texas (pop. 4,000) - City Manager
- Campbell County, Wyoming (pop. 46,000) - Commissioners' Administrative Director/County Administrator
- Canyon, Texas (pop. 15,000) - City Manager
- Copperas Cove, Texas (pop. 34,000) - City Manager
- Killeen, Texas (pop. 145,000) - City Manager
- Kingsville, Texas (pop. 26,000) - City Manager
- Lamar, Colorado (pop. 7,500) - City Administrator
- Lenexa, Kansas (pop. 55,000) - City Manager
- Mineral Wells, Texas (pop. 15,000) - City Manager
- Orange, Texas (pop. 19,000) - City Manager
- Palm Coast, Florida (pop. 86,000) - City Manager
- South Windsor, Connecticut (pop. 26,000) - Town Manager
- Springfield, Oregon (pop. 62,000) - City Manager
- Terrell, Texas (pop. 17,000) - City Manager
- Tolland, Connecticut (pop. 15,000) - Town Manager
- Vail, Colorado (pop. 5,000) - Town Manager
- Venus, Texas (pop. 5,000) - City Administrator
- Victoria, Texas (pop. 67,000) - City Manager
- West Lake Hills, Texas (pop. 3,000) - City Administrator

2018

- Anna, Texas (pop. 14,000) - City Manager
- Bethany, Oklahoma (pop. 19,000) - City Manager
- Cameron, Missouri (pop. 10,000) - City Manager
- Clackamas County, Oregon (pop. 400,000) - County Administrator
- Clallam County, Washington (pop. 75,000) - County Administrator
- Coffeyville, Kansas (9,500) - City Manager
- Craig, Colorado (pop. 9,000) - City Manager
- Erie, Colorado (pop. 26,000) - Town Administrator
- Forney, Texas (pop. 19,000) - City Manager
- Freeport, Texas (pop. 12,000) - City Manager
- Fulshear, Texas (pop. 9,500) - City Manager

- Green Cove Springs, Florida (pop. 7,500) - City Manager
- Humble, Texas (pop. 15,000) - City Manager
- Jacksonville, Texas (pop. 14,000) - City Manager
- Jupiter, Florida (pop. 60,000) - Town Manager
- Lawton, Oklahoma (pop. 94,000) - City Manager
- Lebanon, Missouri (pop. 15,000) - City Administrator
- Lockhart, Texas (pop. 13,500) - City Manager
- Marshall, Texas (pop. 24,000) - City Manager
- Murfreesboro, Tennessee (pop. 130,000) - City Manager
- Nixa, Missouri (pop. 21,000) - City Administrator
- Paducah, Kentucky (pop. 25,000) - City Manager
- Pflugerville, Texas (pop. 60,000) - City Manager
- Plant City, Florida (pop. 38,000) - City Manager
- Riverside, Missouri (pop. 3,000) - City Administrator
- Smithville, Missouri (pop. 10,000) - City Administrator
- Springfield, Missouri (pop. 167,000) - City Manager
- Sunnyvale, Texas (pop. 6,500) - Town Manager
- West University Place, Texas (pop. 14,000) - City Manager
- Wethersfield, Connecticut (pop. 26,000) - Town Manager



CITY MANAGER

LARGO, FLORIDA





YOUR COMMUNITY OF CHOICE

THE COMMUNITY

Conveniently located near world-class beaches and attractions in a picturesque natural setting, Largo is the fourth largest city in the Tampa Bay metro area, comprising 19.59 square miles and a population of over 84,000. Largo offers a great quality of life for residents with entertainment, valued green spaces, an engaged and active community along with safe and attractive streets.

The City is easily accessible from I-275 and I-4, with international commercial air service provided by the nearby Tampa International Airport and St. Pete-Clearwater International Airport. Amtrak rail service is available at the Tampa Union Station with service to New York City, Washington DC, Charleston, South Carolina, Savannah Georgia, and Jacksonville, Orlando, and Miami, Florida. For cruisers, Port Tampa Bay serves Carnival, Celebrity Cruises, Royal Caribbean International, and Norwegian cruise lines.

The St. Pete/Clearwater was recently named one of the world's 100 most-loved travel destinations. Along with miles of white-sand beaches, Pinellas County is home to mind-blowing museums and galleries including the Salvador Dali Museum, Museum of Fine Arts, and the Clearwater Marine Aquarium. Nearby Tampa is home to Bush Gardens Tampa Bay, the Florida Aquarium, Zoo Tampa and Walt Disney World and Universal Studios are only 90 miles away in Orlando.

Largo's special events are well known in the community

as family friendly activities that draw crowds from the surrounding Tampa Bay area. From ticketed events at the Central Park Performing Arts Center to free events in Largo Central Park, a diverse program of community celebrations includes Touch-a-Truck, Fourth of July, and Holiday Stroll. You can find more information on events in the City of Largo at LargoEvents.com. Florida's coast-to-coast connector is the Fred Marquis Pinellas Trail. The biking and walking path is a 75-mile continuous multi-use pathway stretching from Tarpon Springs to St. Petersburg with connections to Dunedin, Clearwater, Safety Harbor, and Largo.

Largo is proud to be a part of Champa Bay! The Tampa Bay Buccaneers, Tampa Bay Rays, and Tampa Bay Lightning are just the highlights of sports in the area. The area is also home to Major League Baseball's spring training sites and numerous semi-pro and collegiate teams. Shopping opportunities abound with national chains, local boutiques and regional shopping centers including Hyde Park Village, and International Plaza & Bay Street. Diverse dining and nightlife experiences include the area's growing list of renowned restaurants featuring unique and rich cuisines, including waterfront bistros and bars. The community features fine dining to farm-to-table restaurants and enjoys fresh Gulf seafood and authentic Spanish and Latin dishes.

Largo's health care needs are met by the Largo Medical Center, a 455-bed which is a HCA Florida teaching hospital specializing in cardiovascular services with

THE COMMUNITY, continued

advanced heart failure care, including a four bed Transplant Intensive Care Unit. Additionally, BayCare is a large regional healthcare provider with six hospitals located in Pinellas County and is regularly recognized as a repeat winner of the Fortune 100 “Best Companies to Work For.”

The City serves as the central hub of recreational activity in Pinellas County along with St. Petersburg to the south, Clearwater to the north and Tampa to the east just across the causeway. For swimming, boating, fishing, or any outdoor activity, you can't beat the County's 35 miles of powdery white beaches and nearly 588 miles of coastline. Largo has an average of 361 days of sunny weather each year where you can enjoy the surf, sun, and sand. Three of the top ten beaches in the nation are located in Pinellas County including Clearwater Beach, Fort De Soto Park, and Caladesi Island. The City Parks system is comprised of nearly 500 acres of green space including 20 parks, 11 miles of walking trails and many opportunities to canoe, kayak, and paddleboard. Residents can also access three recreation centers, a performing arts venue, and the largest library in Pinellas County.

Notable developments in the community that have been recently completed and/or are underway include over 600 units of residential rental complexes, and an additional 1,000 units of multiple residential apartment complexes/town homes ranging from workforce housing to market rate units. The new Horizon West Bay City Hall mixed use complex in Downtown Largo is also currently under construction which will include 20,000 square feet of retail, a 350+ car parking garage, and 80,000 square feet of City Hall offices which is scheduled to be open in the Fall of 2024.

K-12 education is served by the Pinellas County School District which is the 7th largest school district in Florida and the 28th largest district in the United States. The School District's administrative headquarters are located in Largo and operates 21 public schools serving over 11,500 students within the City limits. Private and parochial school providers include Saint Patrick Catholic School, Indian Rocks Christian School, Country Day School, Plato Academy Largo, and Saint Paul's Clearwater. Area higher educational opportunities include Saint Petersburg College, University of South Florida, The University of Tampa, Florida College, and the Strayer University Tampa Westshore Campus.

The City's economic targeted businesses and industries include healthcare, manufacturing, educational services, professional, scientific & tech services and information, and finance & insurance. Major employers include the Pinellas County Sheriff's Office, TD Synnex (Tech Data), HCA Florida Largo Hospital, Empath Health, the City of Largo, Publix Supermarkets, Inc., The Palms of Largo, SCC Soft Computer, Inc., Diagnostic Medical Group, and the Pinellas County Schools Administration Department.

Largo's demographics reflect a diverse resident population comprised of 83% White, 6% Black or African American, 0.4% American Indian and Alaska Native, 3.5% Asian, 12.6% Hispanic or Latino, and 3.2% Two or More Races. The City's median household income is \$48.8K with an average home price of \$367,000 a 37.83% change from 2021-2022.

Awards & Recognition

2023 Top Workplace USA –
Energage (3-year winner)

2021 GFOA Distinguished Budget
Presentation Award

GFOA Certificate of Achievement
for Excellence in Financial
Reporting (32 consecutive years)

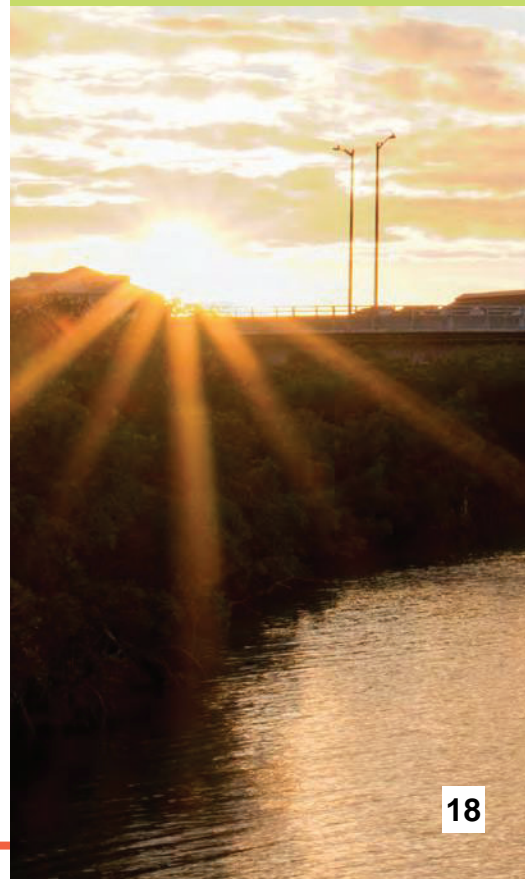
Florida Water Environment
Association (FWEA) 2021
Collection System of the Year –
Medium Utility Category

AIA Sustainability Award – Horizon
West Bay Project (City Hall Mixed
Use Project)

Family Friendly Business Award –
Family Friendly Pinellas

Website Prestige Award Tampa Bay
Public Relations Society (PRSA)

Reputation/Brand Management –
Certificate of Excellence Tampa
Bay Public Relations Society
(PRSA)





GOVERNANCE & ORGANIZATION

The City of Largo operates under a council-manager form of government that combines the strong political leadership of the City Commission with the professional experience of a professional City Manager. Its governing body includes six citizen Commissioners and a Mayor who work together to set policy. The City Manager sets policy direction and directs day-to-day operations. The Mayor & City Commission are elected in nonpartisan, at-large elections to four-year overlapping terms on the first Tuesday after the first Monday in November of even numbered years. The Mayor & City Commission appoint/confirm the City Manager, City Attorney/contracted legal services, Assistant City Manager, and the City Clerk.

The City provides an array of traditional municipal services including; Administration, Community Development, Engineering Services, Information Technology/IT, Environmental Services (water reclamation facility, reclaimed water), Finance, Human Resources, Fire Rescue, Police, Public Works (solid waste/recycling, streets and stormwater, facilities, and fleet), Communications & Engagement (public information & outreach), Library Services, Recreation, Parks, and Arts (including a golf course and a performing arts center).

The City's Adopted FY 2023 Total Annual Budget is \$248.4 million (General Fund \$103.4 million) which is supported with a millage rate of 5.5200. Quality municipal services are provided by approximately 975 employees, with most non-management employees represented by multi-year collective bargaining agreements with the Communications Workers of America (CWA), International Association of Fire Fighters (IAFF), and the Police Benevolent Association (PBA).

High-Performance Organization (HPO)

The City of Largo intentionally underwent a fundamental cultural shift in 2017 with the development of its first City-wide strategic plan and subsequently embarked on the journey to become a High-Performance Organization (HPO). This transformative program empowers individuals at all levels of the organization to participate in meaningful projects and initiatives that have resulted in high levels of employee engagement, community involvement, and superior services. Recent successes include implementing parental leave and adopting a flexible place culture. Through values aligned behavior, a foundation was established for how the organization interacts in the workplace and serves the community. The City recently adopted strategic anchors that include investing in employees, fostering a work culture that supports its values, and earning community trust.

The City's commitment to HPO has created an organization that is flexible and resilient that intentionally embraces the building of leadership capacity at all levels of the organization. In an HPO work culture, all voices are valued at the table and better decisions are made that support superior service delivery to the community.

The HPO model represents a collection of best practices in leadership and management that when combined, ensure that an organization's culture and strategy work together. When culture and strategy successfully complement each other, an organization reaches a state of high performance.

Vision Statement
To be the community of choice in Tampa Bay!

Mission Statement
To provide superior services that inspire community pride.

Strategic Plan Focus Areas & Initiatives



Focus on Sustainability:

- Initiative #1: Renew our Natural Environment to Ensure Sustainability for Future Generations
- Initiative #2: Advance a Flexible and Resilient Organization That Delivers Superior City Services
- Initiative #3: Foster a Community Where Opportunities Exist for Residents and Businesses to Realize Their Full Potential

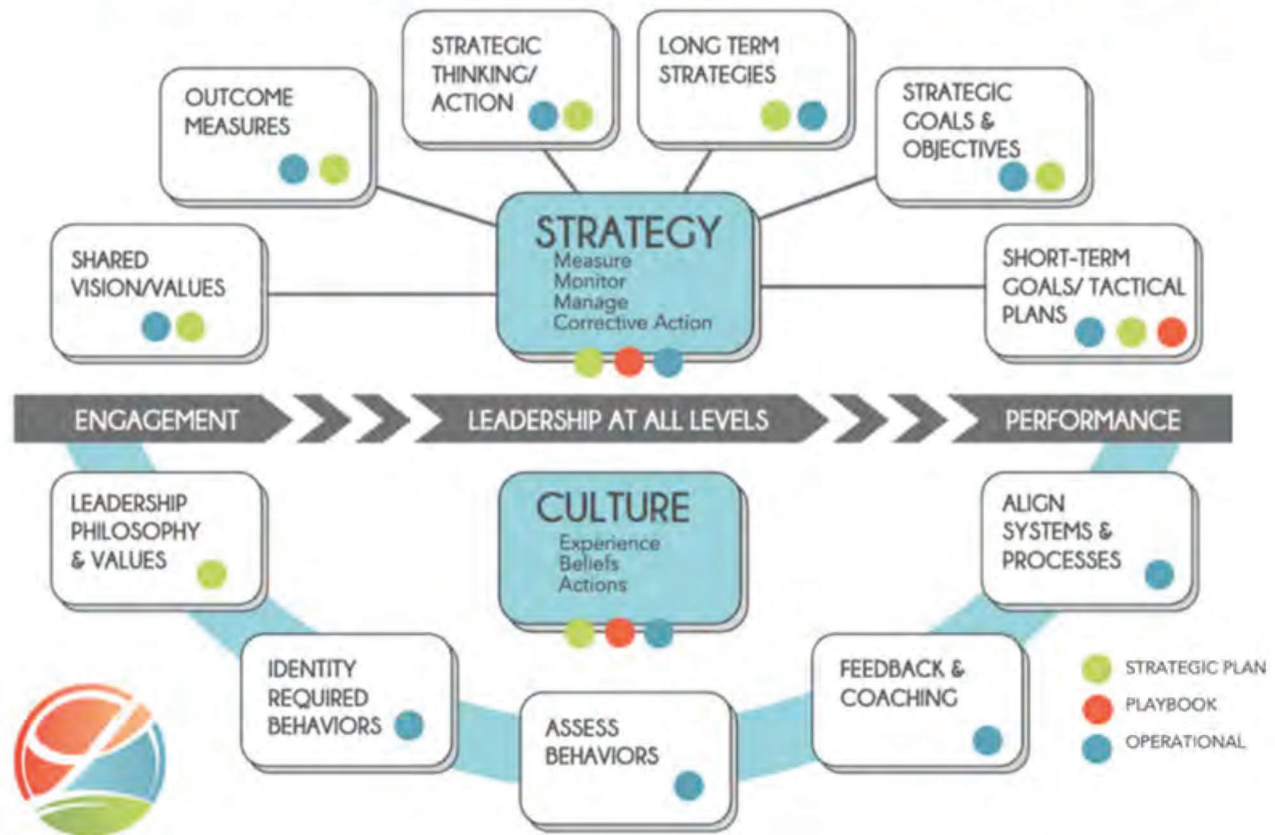
Focus on Public Health & Safety:

- Initiative #1: Invest in Quality Public Infrastructure
- Initiative #2: Build a Community of Safe & Healthy Neighborhoods
- Initiative #3: Ensure the Health, Safety, and Economic Viability of the Community Through Effective Emergency Management

Focus on Community Pride:

- Initiative #1: Develop an Active & Interconnected Downtown
- Initiative #2: Cultivate and Support a Vibrant Intergenerational Community That Attracts Residents & Businesses

ROADMAP TO HIGHER PERFORMANCE



Culture

Leadership

- We believe to build community, we must empower team members to demonstrate our values of integrity, collaboration, passion, and creativity as part of our high-performing organization.
- We will reach our organizational goals and build trust through shared decision-making, promoting leadership opportunities, communication at all levels, and celebrating success.
- We will seek to attract motivated, creative, and flexible people and will invest in their professional development.

Values

- **Integrity:** Serving the public with honesty, transparency, and according to ethical standards; respecting the worth of others and doing what is right.
- **Collaboration:** Communication, engagement, and teamwork that is inclusive of our internal and external partners.
- **Passion:** Approaching the job with devotion, enthusiasm, and curiosity; caring about results and enjoying our work.
- **Creativity:** Innovative thinking that solves problems and improves service delivery.

Strategy

- **Outcome Measures:** Monitoring and measuring performance at the operational, management and leadership level.
- **Strategic Thinking:** Long-term goals are served through strategic planning and short-term tactics continue to move us forward.
- **Strategy Components:**
 - Executive Leadership Playbook
 - Annual Planning Retreats
 - Departmental Nested/Aligned Strategic Plans
 - Departmental Action Plans



ABOUT THE POSITION

The City Manager serves as Chief Administrative Officer of the municipal government, and reports to the Mayor & City Commission for oversight of City services pursuant to the City Charter, as well as federal, state, and local laws, and within accepted professional standards. The position promotes the development of a flexible and progressive organization that provides cost-effective and customer-friendly delivery of quality services to the community. Direct reports include the Assistant City Manager, Executive Assistant, Administrative Assistant, Director of Performance and Budget, Director of Communications & Engagement, Police Chief, Fire Chief, Director of Community Development, City Clerk, and Director of Human Resources.

The current City Manager is retiring following a 43+ year tenure with the City including service as a Department Head in various Departments, with 25 years as the Assistant City Manager, and more than seven years as City Manager. The selected City Manager will be required to establish residency in the City of Largo and must be approved by at least five of the seven members of the City Commission.

A summary of the responsibilities of the City Manager includes the following:

- Confers with the City Commission regarding budgetary issues and monitors the financial condition and long-range fiscal management needs.
- Appoints and supervises department directors and team members, except as otherwise specified in the City Charter.
- Oversees all municipal service functions and city departments, including personnel management, collective bargaining, and employee/labor relations.
- Performs grant, contract, and project administration and management services.
- Implementation and management of policies established by the City Commission.
- Works collaboratively with internal and external stakeholders to promote new business development and growth within the City.
- Communicates with residents, the general public, businesses, and other governmental entities and represents the City in regional, state, and national organizations at meetings or conferences to ensure awareness of programs and opportunities.
- Assesses the need for new and/or revised policies, procedures, and organizational structures to ensure the continued effective and efficient provision of quality services.
- Provides recommendations to the City Commission on all phases of municipal operations.

CHALLENGES AND OPPORTUNITIES

High-Performance Organization (HPO): The next City Manager is expected to be a champion of the organization's HPO journey which will involve team member training and development programs. Proposed training will involve a comprehensive integration of competency-based development courses that will range from leadership development to technical skills necessary to further advance the City's HPO culture.

Inclusive Workplace: The City recently launched a city-wide Equitable and Inclusive Workplace 5-year plan. The goals of the work plan include; fostering a workplace where all team members feel welcome, included, valued, and are able to realize their full potential, creating an environment that ensures underrepresented team members are able to contribute to the best of their ability, and evolving into an organization that represents, at every level, the identities of the community served.

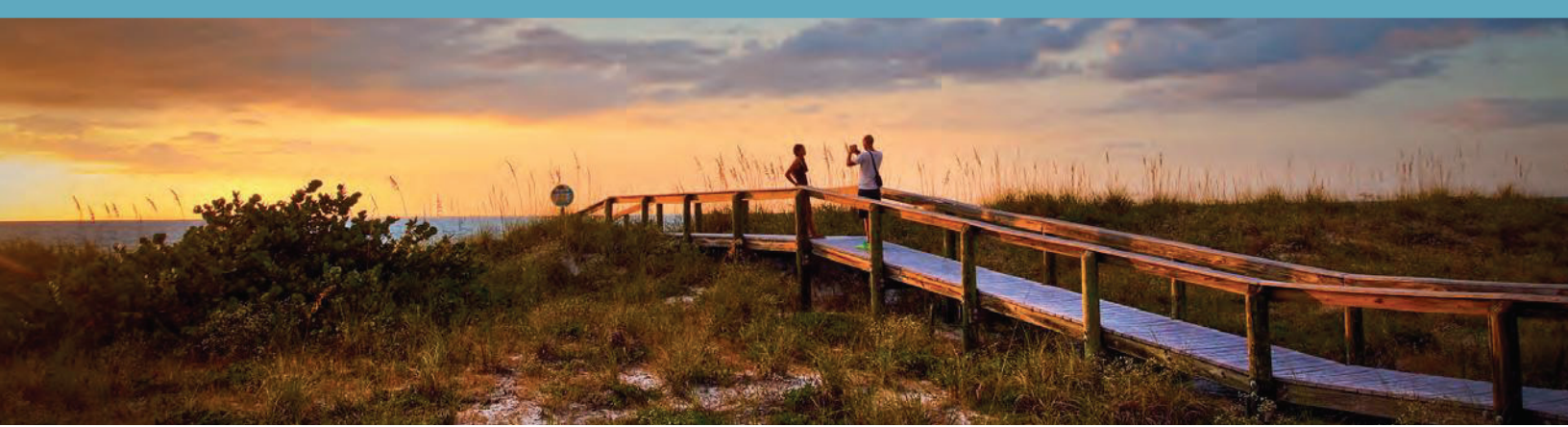
Interconnected Downtown & New City Hall (Horizon West Bay): In response to a long-standing desire of the community to have an active and vibrant downtown, the City Commission and organization responded to the challenge by encouraging a number of housing opportunities, complete streets, and multi-modal systems and public investments. The FY 2023 Budget included a new Downtown Administrator in the Economic Development Division to coordinate activities, design, and business engagement in this key area. A major component of the interconnected Downtown Largo initiative includes the new Horizon West Bay project, which includes a parking garage, 18,000 square feet of retail/commercial space, and 80,000 square feet to serve as the community's new City Hall, which is scheduled to be completed in late 2024.

Affordable Workforce Housing: Like most Florida cities, Largo faces an increasingly difficult challenge in the availability of affordable workforce housing opportunities. The City has been successful in encouraging the development of numerous market rate and affordable rental and town homes in recent years; however, the City wishes to continue the promotion of affordable units in the community to encourage more of a live-work-play environment for current and future residents.

Intergovernmental Relations: As part of the Tampa's metropolitan area comprising almost three million people, Largo is recognized as a leader in intergovernmental relations both locally and at the state and federal level. The next City Manager is expected to be an advocate for developing outstanding intergovernmental relations to help craft proposed solutions to emerging area-wide issues such as homelessness, traffic and congestion, public safety needs involving enclaves and jagged corporate boundaries, and with other issues that typically require multi-jurisdictional approaches.

Recruitment, Retention & Succession Planning: The organization is committed to a flexible/hybrid work environment that promotes both in-office and remote work opportunities. The next City Manager will need to champion a work culture that supports both long-term and new team members while promoting succession planning initiatives. It will be critical to support innovative recruitment and retention strategies to ensure continued organizational capacity to deliver superior services and continue to be recognized as an "Employer of Choice."





IDEAL CANDIDATE

The City of Largo seeks an enthusiastic, visionary, decisive, and servant leader with a commitment to professionalism to be the next City Manager. The ideal candidate will be a pragmatic person of high integrity with a history of adopting best management practices and a track record of building consensus both internally and through fostering community, state, and nation partnerships to achieve community goals. The next City Manager will be a skilled problem-solver with a history of implementing creative and innovative solutions in service delivery to both organizational and community challenges.

Largo seeks a confident and dynamic City Manager with a high level of emotional intelligence that possesses advanced interpersonal skills and a proactive, transparent, and collaborative management style. The candidate should thrive in an environment involving a high level of team member, resident, and business engagement in municipal matters. The selected individual will be accessible, promote public outreach, and have a desire to be highly visible both within the organization and becoming part of the fabric of the community. The City Manager should be an excellent communicator, public speaker, and facilitator. The selected candidate should honor transparency and be comfortable operating under Florida's "Government in the Sunshine Act" and broad Public Records Act environments.

The ideal candidate should possess highly effective board skills as an advisor to the City Commission and Executive Leadership Team as they navigate both policy and administrative decision-making processes, being politically savvy but never political. A critical role is fully informing the Mayor & City Commissioners in the most appropriate and timely manner and creating a positive, trusting, productive, and lasting relationship with all members of the governing body and team members is desired.

An advocate for local government and the team members who provide municipal services, the new City Manager should espouse servant leadership principles and be committed to advancing the organization's HPO culture. The ideal candidate will promote team building and model the highest level of integrity and ethics. A skilled delegator who is comfortable in managing the big picture, the selected candidate will empower team members and have the ability to motivate individuals to build high-performance and results-driven teams. They will be an active member of state and national trade associations, be supportive of the professional development for team members, and serve as a coach and mentor for the organization. The Manager will be a champion of interdepartmental collaboration and promote outstanding customer service, both internally and externally. The ideal candidate will have a passion for public service while maintaining a work-life balance and encouraging team members to do the same. Additionally, the candidate will have a successful background in developing progressive strategies with collective bargaining groups and in contract administration, and will ensure harmonious union/management communications and relations.

The City seeks a Manager who can help chart the community vision for economic development in both new development and redevelopment initiatives. Experience with innovative approaches involving the conversion of traditional major corridor commercial-type developments and implementing strategies to encourage both market-based and affordable housing opportunities is desired.

Lastly, the ideal candidate should have a strong financial background/acumen, including long-term budgeting and capital planning skills, and an understanding of municipal administrative services and operations and how they need to interact cohesively to provide exceptional local government services to residents and customers.

EDUCATION & EXPERIENCE

The selected candidate should hold a Bachelor's degree from an accredited college or university in business administration, public administration, or a closely related field, with a Master's degree preferred. Candidates should have at least five years of experience in managerial, financial, and executive level decision-making, ideally in a comparable sized city to Largo (in an urbanized area), with seven+ years preferred. Candidates will also be considered that possess any combination of education and/or work experience deemed relevant and equivalent to achieve the successful performance of the job.

COMPENSATION & BENEFITS

The City of Largo offers a competitive salary depending on qualifications and experience. The anticipated package will include low to no cost medical, dental, and vision coverage; flexible spending accounts (FSA), health savings (HSA), paid life and accidental death insurance with an option to purchase additional supplemental life coverage. Retirement includes participation in a 401(a) Deferred Compensation Plan, with a 5% employee contribution and 8% City match, with vesting on enrollment, coupled with an additional 4.5% annual contribution to a City-Paid 457 (b) Plan. Additional benefits include PTO/Leave, paid holidays, 24-hour fitness access, recreation cards for the entire family, and a \$400 yearly wellness reimbursement for classes or events at the City's Recreation Centers. A vehicle allowance is also provided. The City Manager is required to establish and maintain their residency within the Largo City limits in a reasonable period of time following appointment.

The City of Largo values diversity in its workforce and is an EEO/AA employer and complies with the guidelines of the Americans with Disabilities Act. Applicants selected as finalists for this position will be subject to a comprehensive background check.

APPLICATION PROCESS

[Please apply online](#)

Pursuant to the Florida Public Records Act, all applications are subject to public disclosure upon receipt of a public records request.

For more information on this position, contact:

Doug Thomas, Executive Vice President - Recruitment & Leadership Development

DouglasThomas@GovernmentResource.com

cell: 863-860-9314



RESOURCES

City website: <https://www.largo.com/>

Largo High-Performance Organization:

https://www.largo.com/services/jobs/high_performance_organization.php

Chamber of Commerce website: Central Pinellas

<https://www.centralchamber.biz/home>

CVB website: Visit St. Pete/Clearwater

<https://www.visitstpeteclearwater.com/>





CITY MANAGER

City of Clermont, Florida



THE COMMUNITY

Clermont, Florida, has a population of 44,000 and is the largest city in Lake County located at the intersections of Highway 27 and State Road 50 and within 30 minutes from Orlando and its theme parks and International Airport. Founded in 1884 as a “model town” and comprising 19 square miles, this picturesque city sits among rolling hills and lakes. It is known as the “Choice of Champions” due to its international reputation as a training ground for Olympic medalists and other elite athletes. Clermont was named one of the Top 20 Cities in America “Leading the Way” in economic development and quality of life. An epicenter for health, wellness, and fitness, Clermont has a thriving healthcare cluster with world-class orthopedics, cancer treatment, and robotic urologic services treating patients from across the nation.

Clermont is an ideal place to live, work, and play! The city has many charms and enjoys a quality of life that has put it in the Top 20 Cities by the International City/County Management Association. Clermont boasts 24 parks and 14 lakes within its city limits including Waterfront Park, which was named among the best in Central Florida. Residents and visitors enjoy recreational pursuits from paddle boarding, birding, biking, and hiking to picnics and fishing. Amenities including a splash pad, a boathouse for rowing and sailing, a recreation center with a pool and indoor basketball courts, and a 10-mile clay trail loop for long-distance running and walking. Neighboring Lake Louisa State Park provides additional opportunities, including equestrian trails. As the Triathlon Capital of the World, Clermont offers athletes many opportunities to compete. Additionally, the National Training Center (a part of Orlando Health

South Lake Hospital) located in Clermont, is a state-of-the-art sports and fitness training facility for hundreds of high schools, collegiate, professional, and amateur athletes from around the country and the world.

The mark of any great city and “hometown” is a historic downtown, and Clermont has just that with a variety of charming, unique shops and some of the area’s best restaurants and local breweries with traditional and local cuisine. On Sundays, shoppers are treated to the popular farmer’s market. The first Friday of every month, City Hall Park offers free, live musical entertainment, plus gourmet food trucks. Annual downtown events include a holiday parade, a July 4th celebration, a campout, and a bicycle scavenger hunt. Clermont has numerous national and local retail stores and a variety of chain and local restaurants usually found in larger metropolitan areas. The City also has a movie theater, a community theater, and world-class entertainment at the Clermont Performing Arts Center.

While much of Clermont is residential in character, its economy is centered in retail, real estate, personal services, and healthcare. Clermont’s economic factors project continued growth in the local economy. During the last five years, the city’s population has increased by 8,402 residents (25.97%). Per capita, personal income levels have increased by \$5,810 (22.01%). The recent growth has resulted in an increase in property values which has enabled Clermont’s property tax millage rate of 4.2061 to be among the lowest of other comparable cities in the Central Florida region. Additionally, the cost of living for the region is below the national average and there is no personal income tax, either

THE COMMUNITY *continued*

locally or statewide. One cent of the sales tax charged within Lake County is limited to \$50 per transaction (1% of \$5,000) which is used for infrastructure including roads, buildings, land, improvements, and certain equipment. The surtax generates approximately \$3 million per year to support Clermont's capital projects.

Quality education for students in Pre-K through grade 12 is available through Lake County Public Schools which includes the new Health Sciences Collegiate Academy (HSCA) offering an accelerated health sciences academic program to South Lake County students. Students explore careers in STEM and health sciences through hands-on activities and early exposure to college courses. Private school options include faith-based schools and the nearby, internationally acclaimed Montverde Academy. Quality higher education is also available through Lake-Sumter State College, with a campus in Clermont, Saint Leo University, which offers programs at Lake-Sumter, and the University of Central Florida in nearby Orlando.

Major area employers include Senniger Irrigation, AmaZulu, (Company Headquarters), Lake County Schools, the City of Clermont, Publix Supermarkets, Special Olympics Florida (State Headquarters), and Progressive Plumbing. Additionally, major healthcare employers include South Lake Hospital, Vista Clinical and Diagnostics (National Headquarters), PUR Clinic (World-renowned micro-robotic surgeons), South Lake Pain Institute (Research, regeneration, and stem cell therapies), and the University of Florida Cancer Center.

Clermont's diverse demographics reflect a population comprised of 71.69% White, 14.41% African American, 0.42% Native American, 4.19% Asian, 5.37% from other races, and 3.83% from two or more races.



COMMUNITY AWARDS

The City was runner-up for Best Place to Work among employers in Lake and Sumter Counties in a poll conducted by the *Daily Commercial* and *South Lake Press*.



In 2017, the City of Clermont was ranked by WalletHub as the most "Business Friendly" small city to do business in Central Florida among cities with populations of 25,000-100,000.

The Clermont Police Department is accredited by the Commission for Florida Law Enforcement Accreditation, which requires meeting the highest standards. The city was also named in the top 3 cities in Florida for reducing crime.



The City of Clermont Fire Department is accredited by the Commission on Fire Accreditation and one of only 22 of the 500 fire departments in Florida to have earned accreditation. The City of Clermont Fire Department also received the Class 1 Public Protection Classification (PPC) rating from the Insurance Services Office (ISO) in 2020.



OTHER AWARDS AND DESIGNATIONS:

- › Runner-Friendly Community
- › Bicycle-Friendly Community
- › Tree City USA
- › Largest Performing Arts Center in Lake County
- › Longest white-sand beach in inland Florida
- › Designated as “Open for Business”
- › Many financial grants for various infrastructure projects based on evaluation of merits.



GOVERNANCE AND ORGANIZATION

The City of Clermont operates under a Council-Manager form of government. The Mayor & City Council is comprised of five members who serve at large for two-year terms. Elections are staggered with seats 1, 3, and 5 up for election in even-numbered years and seats 2 and 4 up for election in odd-numbered years. The Mayor and City Council appoint a professional City Manager to serve as the organization’s Chief Executive Officer, overseeing all City operations and carrying out the policies set by the governing body.

A full array of municipal services is provided by roughly 405 full- and part-time employees (Police and Fire employees are union-represented) with an annual budget of \$158 million, inclusive of a \$40 million General Fund.

MISSION STATEMENT

To preserve and enhance the quality of life for the Clermont community by providing exceptional services.

ABOUT THE POSITION

The City Manager serves as the municipal organization's CEO and the head of the administrative branch of the City. The position is responsible to the Mayor and Council for the proper administration of all affairs of the City per the City's Charter, local ordinances, and laws, along with policies prescribed by the governing body. Responsibilities include but are not limited to:

- Providing oversight and administration of all City Departments
- Directing the administrative activities of the organization
- Acting as a focal point for strategic planning, programming, and budgeting
- Serving as the liaison between the City staff and Mayor and Council
- Supervising the City's Department Directors
- Assisting the general public
- Serving on various Boards & Committees

Direct Reports include an Assistant City Manager and the Senior Staff/Directors of the following Departments:

- | | |
|--------------------------|--|
| ➤ Communications | ➤ Planning and Development |
| ➤ City Clerk | ➤ Human Resources |
| ➤ Finance | ➤ Procurement Services |
| ➤ Building Services | ➤ Parks & Recreation |
| ➤ Information Technology | ➤ Public Services (Water & Wastewater Treatment, Distribution & Collection, Water Conservation, Sanitation, Construction, Asset Management & Stormwater, and Grounds & Facilities) |
| ➤ Police | |
| ➤ Fire | |

Examples of Job Functions:

- Appoints and, when necessary, removes all Directors and employees of the City.
- Directs and supervises the administration of all Departments of the City, provided by the City Charter or by law.
- Attends all meetings of the City Council and of its Committees and shall have the right to take part in discussion but may not vote. Provides professional assistance, guidance, and recommendations to elected officials.
- Sees that all laws, provisions of the City Charter, and acts of the Council, subject to enforcement by the City Manager or by officers subject to the City Manager's supervision, are faithfully executed.
- Prepares the Annual Budget, submits it to the Council, and monitors City expenditures and revenues to ensure compliance with the adopted budget. Prepares and submits to the Council as of the end of the fiscal year a complete report on the finances and administrative activities of the City for the preceding year.
- Keeps the Council advised of the financial condition and future needs of the City as well as short- and long-term obligations and/or commitments within and outside City jurisdictions.
- Directs the development of the City's Capital Improvement Plan involving major improvements to the City's infrastructure system and municipal government facilities.

ABOUT THE POSITION *continued*

Examples of Job Functions:

- Oversees long-term planning and growth management, land use and zoning activities, implementation of related policies such as the Comprehensive Plan as adopted by the Council, and development regulations.
- Assists in the planning and long-term strategy for future development and expansion or reduction of City services and operations.
- Develops State-of-the-City reports and Quarterly Budget Reports. Assists with the direction of the public relations activities of the City through executive staff or designated Departmental representatives.
- Develops and implements administrative procedures affecting the overall operations of the City.
- Enforces City policies and authorizes disciplinary actions as appropriate.
- Makes such other reports as the Council may require covering the operation of the City Departments which are subject to City Manager direction and supervision.
- Advises and consults with elected and appointed officials, Department Heads, civic groups, individuals, and others on issues, problems, strategies, and policies related to City services.
- Advises the governing body on matters of ethics and represents the City staff in daily interactions with the general public, businesses, media, community organizations, government officials, courts, and other entities.
- Signs and oversees the administration of contracts on behalf of the City under the provision of appropriation ordinances.
- Appoints a qualified person as Purchasing Agent, subject to approval of the Council, by whom all purchases of supplies shall be made subject to the rules and regulations and approve all vouchers for the payment of same. Conduct all sales of personal property which the Council may authorize to be sold as having become unnecessary or unfit for the City's use. Exercise fiscal control over major purchases following established purchasing procedures.
- Determines the salary of Directors and employees according to the wage schedule approved by the Council.
- Manages and controls all City-owned public utilities operated and managed by the municipality and manages all public works and agencies of the City. Manages and controls the use, construction, improvement, repair, and maintenance facilities of the City, including parks, playgrounds and public gymnasiums, and social centers.
- Represents the City of Clermont to other levels of government as well as on regional and local boards or committees.
- Performs such other duties as may be prescribed by the Charter or required by the City Council, not inconsistent with the Charter.

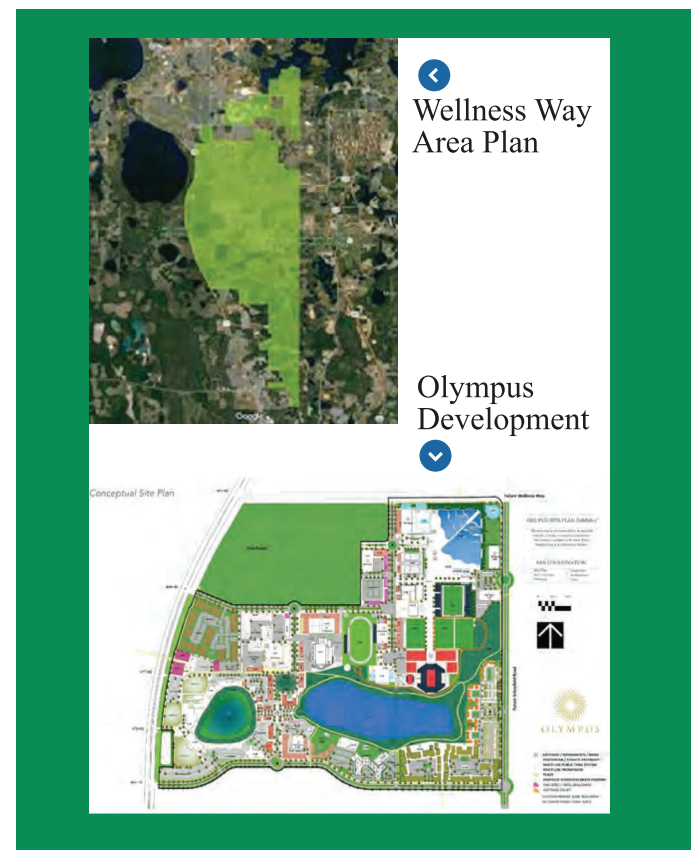


CHALLENGES AND OPPORTUNITIES

Completion of Master Plan Projects: The City of Clermont's major emphasis continues to be on the completion of several capital projects included in the award-winning Downtown-Waterfront Master Plan. The Master Plan offers an exciting view of the future of Clermont and how to protect the very charms that have drawn hundreds of thousands to this internationally recognized city as well as a training ground for the world's elite athletes. Master Plan capital projects are primarily funded from grants and a loan, negating the need for General Fund support. Completed projects include Victory Pointe, a park and stormwater treatment facility; a new Kehler Recreation Center for seniors; the Clermont Boat Ramp; Gateway Entry Welcome Towers, and the Clermont Art Walk. Over the next several years, the following capital projects are expected to be undertaken to complete the City's Master Plan: streetscape work in the six-block downtown core; a focal point to be created at City Hall Park to anchor downtown visitors and serve as a public gathering place; the demarcation of the halfway point of the Florida Coast-to-Coast Trail (a State project nearing completion which creates a continuous, paved trail from St. Petersburg to Titusville); the Clermont Legacy Loop Trail Spur and several smaller connectivity projects to provide connectivity to Downtown from the South Lake Trail. Beyond the Master Plan, other major upcoming infrastructure projects include a new Public Services Complex and expanding the Waste Water Treatment Plant.

Growth Management & Wellness Way: Clermont is one of the fastest-growing cities in Central Florida given its strategic location near major transportation networks and its proximity to Orlando. A candidate who has experience in managing fast-growing communities and recognizing the impact it has on community expectations and associated municipal operations is strongly desired.

The City, Lake County, and several private developers have been working in partnership to master plan the [Wellness Way](#) area comprised of roughly 15,500 acres generally located east of US 27 and south of State Road 50. The development area will be divided into smaller portions, including a Town Center and several additional land use categories, each with different density requirements. It is anticipated that Wellness Way will ultimately have more than 16,531 residential units, further increasing Clermont's population and related service demands. The first major project for Wellness Way is Olympus, which will include state-of-the-art, multi-sport training, and competition, venues, trails, wellness and sports medicine, dining, shopping, entertainment, and residential development to the region. When built out, the project will incorporate 713,713 SF of office space, 231,304 SF of retail space, 129,055 SF of restaurants, 248,468 SF of sports facilities, and 1,312 hotel rooms. Wellness Way developer Lennar has also acquired 700 acres in the development area with plans to construct roughly 1,800 homes. The City Manager and Administration will play a key role in coordinating the various planning, permitting, utility services, and related activities for the initial and subsequent developments that will occur in the Wellness Way area for years to come.



Council-Manager Relationship: The Clermont City Council has recently changed with several newly elected members serving in their initial terms. Accordingly, the next City Manager will be expected to possess outstanding leadership and communication skills to assist the City Council in evaluating options on policy matters and to assist in the understanding and collaboration of community issues, programs, challenges, and options/ recommendations among all stakeholders. The City Manager should have the skills to develop strong relationships with Council Members and work closely with a younger-tenured governing body to assist them in establishing sound governance principles and assisting in developing consensus on emerging initiatives and priorities.

CHALLENGES AND OPPORTUNITIES *continued*

Strategic Visioning: The next City Manager will play a key role in helping to develop the Community’s Strategic Vision taking into account the desires and dreams of residents, community stakeholders, the City Council, and staff to achieve Clermont’s future direction. The City Manager will subsequently be tasked with developing both short- and long-term strategies to help the City address several current challenges and opportunities in the areas of growth management, traffic, workforce housing, downtown development, and associated parking in response to the changing growth patterns and demographics of the community. The development of Clermont’s Strategic Vision will be a priority, especially in light of the soon to be completed current Master Plan.

Intergovernmental Relations: Clermont has many partnerships with local, state, and federal agencies in the provision of municipal services, programs, and capital projects. As such, the City Manager will help facilitate the City’s intergovernmental relationships with all partners in addition to fostering collaborative relationships with other institutional and community stakeholders.

Economic Development: In support of the City’s strategic goal to seek a well-balanced and diversified economy, the next City Manager should possess demonstrated experience in economic development, negotiations, cost-benefit analysis, and leveraging public assets and desired community outcomes with private investment opportunities in sports and entertainment, health care, commercial, retail/restaurant, and residential development opportunities.



IDEAL CANDIDATE

Clermont seeks a confident and dynamic City Manager with a high level of emotional intelligence that possesses highly advanced interpersonal skills and a proactive, transparent, and collaborative management style. The candidate should thrive in an environment involving a high level of citizen and business engagement in municipal matters. The selected individual will be accessible to the public, promote public outreach, and have a desire to be highly visible both within the organization and externally throughout the community. The individual should be an effective communicator and public speaker and be comfortable when speaking with individuals at all levels.

The chosen candidate will have strong management and leadership skills and will be approachable, even-tempered, and maintain a calm demeanor, even while simultaneously juggling multiple tasks and numerous high-profile initiatives. The chosen candidate should possess strong financial acumen and experience in long-term capital planning and budgeting skills and have extensive experience with project management. The next City Manager will be a skilled problem solver with excellent negotiation skills and a demonstrated track record of creative and entrepreneurial solutions. They will be open-minded and willing to consider “outside the box” strategies to resolve community issues and challenges.

IDEAL CANDIDATE *continued*

The individual should have a strategic long-range focus to assist the community in charting its future, understanding the need to balance growth and development with the desire to preserve Clermont's history and culture. Experience in managing significant economic development projects and possessing the foresight to proactively anticipate future planning, transportation, utility, sustainability, and resiliency, and other municipal services impacted by growth will be essential.

Given Clermont's history of hosting a large influx of tourists and visitors, previous work in communities that experience significant tourism and special events, including the use of any successful strategies and/or initiatives that have leveraged tourism and special events for the overall betterment of the community would be desirable.

An advocate for City services and the employees who provide such services, the new City Manager should espouse servant leadership principles. The ideal candidate will promote team building and model the highest level of integrity and ethics. A skilled delegator who is comfortable in managing the big picture, the selected candidate will empower employees and have the ability to motivate staff to build high-performance and results-driven teams. He or she will be supportive of professional development for employees and serve as a coach and mentor to staff. The Manager will be committed to promoting interdepartmental communication and coordination and providing outstanding customer service, both internally and externally. The ideal candidate will have a passion for public service but maintain a work-life balance and encourage employees to do the same.

The chosen candidate will hold themselves and others accountable, understand differing perspectives, suggestions, and recommendations as part of their decision-making while building morale and reinforcing a team culture. The selected individual should also be an advocate for transparency, value partnerships, and collaboration, and embrace community outreach to engage constituents in the decision-making processes of the City. The City Manager will be pragmatic, flexible, and adaptable while dealing with the complexities of managing municipal operations.

Preferred candidates will have served as a City/County Manager or as a Deputy City/County Manager, coupled with collective bargaining experience.



EDUCATION AND EXPERIENCE

This position requires a Bachelor's degree in Public Administration, Business Administration, Project Management, or a related field. A Master's degree is preferred. The incoming City Manager should have 10 years of progressively responsible related experience in local government including but not limited to public administration and senior management. Experience in Florida public sector, budget, finance, and growth management are highly desired. The hired candidate must be able to secure a valid State of Florida Driver's License within a reasonable period following appointment. An equivalent combination of higher education and experience may be considered, provided that the education and experience are in a relevant and related field.

COMPENSATION AND BENEFITS

The City of Clermont offers a competitive salary commensurate with qualifications and experience. The City offers a competitive benefits package, including but not limited to retirement, vacation and sick leave, health/dental insurance, and group life insurance. Residency within the City's corporate boundaries is desired.



APPLICATION PROCESS

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

For more information on this position contact:

Doug Thomas, Senior Vice President

DouglasThomas@GovernmentResource.com

863-860-9314



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

Confidentiality

Pursuant to Florida law, all applications are a public record once submitted and available for disclosure upon receipt of a public records request.

RESOURCES

City of Clermont

ClermontFL.gov

City Budget

clermontfl.gov/departments/finance-department

Downtown Clermont Video

youtu.be/NzeU6qY5d5c

City's E-Newsletter

ClermontFL.gov/newsletter

Wellness Way Area Plan

lakecountyfl.gov/wellnessway

South Lake County Chamber of Commerce

southlakechamber-fl.com

SOCIAL MEDIA



References

City of Largo, Florida

Population 84,000

Maggie Paulch, Acting City Manager

mpaluch@largo.com

727-586-7454

City Manager search, 2023

City of Clermont, Florida

Population 44,000

Tim Murry, Mayor

tmurry@clermontfl.org

352-638-8776

Michele Pines, Council Member

mpines@clermontfl.org

352-801-4116

City Manager search, 2021

City of North Port, Florida

Population 77,000

Pete Emrich, Commissioner (Mayor-
Commissioner at the time of the search)

pemrich@cityofnorthport.com

941-286-0249

City Manager search, 2021

City of Plant City, Florida

Population 38,000

Bill McDaniel, City Manager

billmcdl@plantcitygov.com

813-659-4200

City Manager search, 2018

City of Green Cove Springs, Florida

Population: 7,500

Connie Butler, Council Member (Mayor at
the time of the search)

cbutler@greencovesprings.com

904-297-7500

Steven Kelley, Vice Mayor/Council Member

skelley@greencovesprings.com

904-297-7500

Steve Kennedy, City Manager

skennedy@greencovesprings.com

904-297-7500, ext. 3320

City Manager search, 2018

Fee Proposal

Not-to-Exceed Price: \$27,900

Not-to-Exceed Price is comprised of:

- **Fixed Fee of \$25,400**
- **Up to \$2,500 in Ad Placements (billed at actual cost)**

The Fixed Fee includes:

- Stakeholder Interviews and Listening Sessions
- Production of a Professional Recruitment Brochure
- Recruitment Campaign and Outreach:
 - Outreach to Prospective Applicants
 - Custom Graphics for Email and Social Media Marketing
 - Announcement in SGR's Servant Leadership e-Newsletter
 - Post on SGR's Website
 - Ad on SGR's Job Board
 - Two (2) Targeted Job Blasts to SGR's Opt-In Subscriber Database
 - Promotion on SGR's LinkedIn
- Application Management, Screening, and Evaluation
- Semifinalist Evaluation:
 - Questionnaires for up to 15 Semifinalists
 - Recorded One-Way Interviews for up to 15 Semifinalists
 - Media Searches – Stage 1 Reports for up to 15 Semifinalists
- Semifinalist Briefing Books via Electronic Link
- Comprehensive Stage 2 Media Reports for up to Five (5) Finalists
- Background Investigation Reports for up to Five (5) Finalists
- Finalist Briefing Books via Electronic Link
- Reference Checks for up to Five (5) Finalists
- Two (2) Onsite Visits by the Recruiter for 1-3 days each, Inclusive of Travel Costs

Reimbursable Expenses included in the not-to-exceed price:

- Ad placements up to \$2,500 will be billed at the actual cost with no markup for overhead and are incorporated into our not-to-exceed price. Clients may choose additional ads beyond that amount, which will be billed as an additional pass-through cost.

Supplemental Services/Other Expenses not included in the fixed or not-to-exceed price:

- Ad placements over and above \$2,500 will be billed back at actual cost with no markup for overhead.
- There may be additional charges for substantial and substantive changes made to the recruitment brochure after the brochure has been approved by the Organization and the position has been posted online. Organization would be notified of any supplemental costs prior to changes being made.
- At your request, SGR can conduct an online stakeholder survey for \$1,000 to help identify key issues or priorities that you may want to consider prior to launching the search. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to the Organization. Please note that this type of survey may extend the recruitment timeline.
- Online interviews over and above the 15 included in the Fixed Fee - \$250 per candidate.
- Additional comprehensive stage 2 media reports over and above the maximum of five (5) included in the fixed price above - \$750 per candidate.
- Additional background investigation reports over and above the maximum of five (5) included in the fixed price above - \$500 per candidate.
- Additional reference checks over and above the maximum of five (5) included in the fixed price above - \$250 per candidate.
- DiSC Management assessments - \$175 per candidate.
- Semifinalist and finalist briefing materials will be provided to the Organization via an electronic link. Should the Organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits by the recruiter over and above the two (2) onsite visits included in the fixed price are an additional cost. Travel time and onsite time are billed at a professional fee of \$1,000 per day. Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 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.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- If the organization desires any supplemental services not mentioned in this fee proposal, an estimate of the cost will be provided at that time, and no work shall be done without approval.

Billing

SGR will bill the fixed fee in four (4) installments: 30% upon contract execution, 30% after the applicant pool is presented, 30% after finalist interviews, and 10% upon acceptance of employment. Ad placement expenses and supplemental services/other expenses will be billed as incurred or provided. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Terms and Conditions

- The organization agrees not to discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- The organization agrees to refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- The organization agrees to provide SGR with any candidates that were previously accepted as applicants for the given position before engaging SGR to conduct the recruitment for the subject position.
- If the organization wishes to place ads in local, regional, or national newspapers, the organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- The organization agrees to timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening and interviews; failure to do so may, in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.
- The organization agrees to respond to drafts of documents and reports in a timely manner; failure to do so may, in SGR's reasonable discretion, extend timelines and can negatively impact the outcome of the process.

Placement Guarantee

SGR is committed to your satisfaction with the results of our full service recruitment process. If, for any reason, you are not satisfied, we will repeat the entire process one additional time, and you will be charged only for expenses as described in the Fee Proposal under Supplemental Services. Additionally, we promise not to directly solicit any candidate selected under this engagement for another position while they are employed with your organization.

In the event that you select a candidate fully vetted by SGR, who subsequently resigns or is released for any reason within 12 months of their hire date, we are committed to conducting a one-time additional executive search to identify a replacement. In this case, you will only be charged for related expenses as described in the Fee Proposal.

If your organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the placement guarantee will be null and void. Additionally, SGR does not provide a guarantee for candidates placed as a result of a partial recruitment effort or limited scope recruitment.

Understanding of Project & Project Requirements

It is our understanding that the City of New Smyrna Beach is seeking an experienced executive search firm to conduct a nationwide search to fill the position of City Manager. The City is seeking a firm with extensive experience in conducting executive searches for local governments, particularly in the State of Florida. The firm will provide a comprehensive full service recruitment process agreed upon by the City Commission while working directly with the City's Director of Human Resources to conduct the search.

Approach and Methodology

A full-service recruitment typically entails the following steps:

- 1. Organization/Position Insight and Analysis**
 - Project Kickoff Meeting and Develop Anticipated Timeline
 - Stakeholder Interviews and Listening Sessions
 - Develop Recruitment Brochure
- 2. Recruitment Campaign and Outreach to Prospective Applicants**
 - Advertising and Marketing
 - Communication with Prospective Applicants
 - Communication with Active Applicants
- 3. Initial Screening and Review by Executive Recruiter**
- 4. Search Committee Briefing to Review Applicant Pool and Select Semifinalists**
- 5. Evaluation of Semifinalists**
 - Written Questionnaires
 - Recorded One-Way Semifinalist Interviews
 - Media Searches - Stage 1, as described below
- 6. Search Committee Briefing to Select Finalists**
- 7. Evaluation of Finalists**
 - Comprehensive Media Searches - Stage 2, as described below
 - Background Investigation Reports
 - DiSC Management Assessments (if desired, supplemental cost)
 - First Year Plan or Other Advanced Exercise
 - Press Release Announcing Finalists (if requested)
- 8. Interview Process**
 - Face-to-Face Interviews
 - Stakeholder Engagement (if desired)
 - Deliberations
 - Reference Checks (may occur earlier in process)
- 9. Negotiations and Hiring Process**
 - Determine Terms of an Employment Offer
 - Negotiate Terms and Conditions of Employment
 - Press Release Announcing New Hire (if requested)

Step 1: Organization/Position Insight and Analysis

Project Kickoff Meeting and Develop Anticipated Timeline

SGR will meet with the organization at the outset of the project to discuss the recruitment strategy and timeline. At this time, SGR will also request that the organization provide us with photos and information on the community, organization, and position to assist us in drafting the recruitment brochure.

Stakeholder Interviews and Listening Sessions

Stakeholder interviews and listening sessions are integral to SGR's approach. SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your specific needs. Obtaining a deep understanding your organizational needs is the crucial foundation for a successful executive recruitment. In collaboration with the organization, SGR will compile a list of internal and external stakeholders to meet with regarding the position. These interviews and listening sessions will identify potential issues that may affect the dynamics of the recruitment and contribute to a comprehensive understanding of the position, special considerations, and the political environment. This process fosters organizational buy-in and will assist us in creating the position profile.

Develop Recruitment Brochure

After the stakeholder meetings, SGR will develop a recruitment brochure, which will be reviewed and revised in partnership with your organization until we are in agreement that it accurately represents the sought-after leadership and management attributes.

To view sample recruitment brochures, please visit:

<https://sgr.pub/OpenRecruitments>

Step 2: Recruitment Campaign and Outreach to Prospective Applicants

Advertising and Marketing

The Executive Recruiter and the client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, with a reach of over 40,000 subscribers in all 50 states, will announce your position. Additionally, we will send targeted emails to opt-in subscribers of SGR's Job Alerts, and your position will be posted on SGR's website and Job Board. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page. Furthermore, we will provide a recommended list of ad placements to be approved by the client, targeting the most effective venues for reaching qualified candidates for that particular position.

Communication with Prospective Applicants

SGR maintains regular communication with interested prospects throughout the recruitment process. Outstanding candidates often conduct thorough research on the available position before submitting their resumes.

As a result, we receive a significant number of inquiries, and it is crucial for the executive search firm to be well-prepared to respond promptly, accurately, and comprehensively, while also offering a warm and personalized approach. This initial interaction is where prospective candidates form their first impression of the organization, and it is an area in which SGR excels.

Communication with Active Applicants

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 personalized responses to any questions or inquiries. SGR maintains frequent communication with applicants to ensure they remain enthusiastic and well-informed about the opportunity. Additionally, SGR communicates with active applicants, keeping them informed about the organization and community.

Step 3: Initial Screening and Review by Executive Recruiter

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

In contrast with the triage process mentioned above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to ensure that the minimum requirements of the position are met and determine which preferred requirements are satisfied. This sifting process examines how well candidates' applications align with the recruitment criteria outlined in the position profile.

Step 4: Search Committee Briefing to Review Applicant Pool and Select Semifinalists

At this briefing, SGR will conduct a comprehensive presentation to the Search Committee and facilitate the selection of semifinalists. The presentation will include summary information on the process to date, outreach efforts, the candidate pool demographics, and any identified trends or issues. Additionally, a briefing on each candidate and their credentials will be provided.

Step 5: Evaluation of Semifinalists

The review of resumes is a crucial step in the executive recruitment process. However, resumes may not fully reveal an individual's personal qualities and their ability to collaborate effectively with others. In some instances, resumes might also tend to exaggerate or inflate accomplishments and experience.

At SGR, we understand the significance of going beyond the surface level of a resume to ensure that candidates who progress in the recruitment process are truly qualified for the position and a suitable match for the organization. Our focus is to delve deeper and gain a comprehensive understanding of the person behind the resume, identifying the qualities that make them an outstanding prospect for your organization.

During the evaluation of semifinalist candidates, we take the initiative to follow up when necessary, seeking clarifications or additional information as needed. This approach ensures that we present you with the most qualified and suitable candidates for your unique requirements. At SGR, our ultimate goal is to match your organization with individuals who possess not only the necessary qualifications but also the qualities that align with your organizational culture and values.

Written Questionnaires

As part of our thorough evaluation process, SGR will request semifinalist candidates to complete a comprehensive written exercise. This exercise is designed to gain deeper insight into the candidates' thought processes and communication styles. Our written instrument is customized based on the priorities identified by the Search Committee. The completed written instrument, along with cover letters and resumes submitted by the candidates, will be included in the semifinalist briefing book.

Recorded One-Way Semifinalist Interviews

This approach provides an efficient and cost-effective way to gain additional insights to aid in selecting finalists to invite for an onsite interview. The interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Additionally, virtual interviews provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest.

Media Searches - Stage 1

"Stage 1" of our media search process involves the use of the web-based interface Nexis Diligence™. This platform is an aggregated subscription-based platform that allows access to global news, business, legal, and regulatory content. These media reports at the semifinalist stage have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any "red flags" or noteworthy media coverage to the Search Committee as part of the review of semifinalists with the Search Committee.

Step 6: Search Committee Briefing to Select Finalists

Prior to this briefing, SGR will provide the Search Committee with a briefing book on the semifinalist candidates via an electronic link. The briefing book includes cover letters, resumes, and completed questionnaires.

If applicable, a separate email with the link to view the recorded online interviews is sent to the Search Committee. The objective of this meeting is to narrow the list to finalists who will be invited to participate in onsite interviews.

Step 7: Evaluation of Finalists

Comprehensive Media Searches - Stage 2

“Stage 2” of our media search process includes the web-based interface Nexis Diligence™, supplemented by Google as an additional tool. By combining both resources, we offer an enhanced due diligence process to our clients, enabling efficient and thorough vetting of candidates and minimizing the risk of overlooking critical information. The Stage 2 media search consists of a more complex search, encompassing social media platforms, and has proven to be instrumental in identifying potential adverse news about the candidate that may not have been disclosed previously. The media search provides the Search Committee with an overview of the candidate’s press coverage throughout their career. View a sample media report at: <https://sgr.pub/SGRMediaReport>.

Background Investigation Reports

Through SGR’s partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below. View a sample background report at: <https://sgr.pub/SGRBackgroundReport>.

- Social security number trace
- Address history
- Driving record (MVR)
- Federal criminal search
- National criminal search
- Global homeland security search
- Sex offender registry search
- State criminal court search for states where candidate has lived in previous 10 years
- County wants and warrants for counties where candidate has lived or worked in previous 10 years
- County civil and criminal search for counties where candidate has lived or worked in previous 10 years
- Education verification
- Employment verification for previous 10 years
- Military verification (if requested)
- Credit report (if requested)

DiSC Management Assessments (if desired, supplemental cost)

SGR utilizes the DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment provides a comprehensive analysis and report on the candidate’s preferences in five crucial areas: management style, directing and delegating, motivation, development of others, and working with their own manager. View a sample report at: <https://sgr.pub/SGRDiSCReport>.

For assessments of more than two candidates, a DiSC Management Comparison Report is included, offering a side-by-side view of each candidate's preferred management style. View a sample comparison report at: <https://sgr.pub/SGRDiSCCompare>.

First-Year Plan or Other Advanced Exercise

SGR will collaborate with your organization, if desired, to create an advanced exercise for the finalist candidates. One such example is a First-Year Plan, where finalist candidates are encouraged to develop a first-year plan based on their current understanding of the position's opportunities and challenges. Other exercises, such as a brief presentation on a topic to be identified by the Recruiter and Search Committee, are also typically part of the onsite interview process to assess finalists' communication and presentation skills, as well as critical analysis abilities.

Step 8: Interview Process

Face-to-Face Interviews

SGR will arrange interviews at a date and time convenient for your organization. This process can be as straightforward or as elaborate as your organization desires. SGR will aid in determining the specifics and assist in developing the interview schedule and timeline. We will provide sample interview questions and participate throughout the process to ensure it runs smoothly and efficiently.

Stakeholder Engagement

At the discretion of the Search Committee, we will closely collaborate with your organization to involve community stakeholders in the interview process. Our recommendation is to design a specific stakeholder engagement process after gaining deeper insights into the organization and the community. As different communities require distinct approaches, we will work together to develop a tailored approach that addresses the unique needs of the organization.

Deliberations

SGR will facilitate a discussion about the finalist interviews and support the Search Committee in making a hiring decision or determining whether to invite one or more candidates for a second interview.

Reference Checks

SGR uses a progressive and adaptive automated reference check system to provide insights on candidates' soft skills from a well-rounded group of references. References may include elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, and civic leaders. SGR's reference check platform is anonymous, proven to encourage more candid and truthful responses, thus providing organizations with more meaningful and insightful information on candidates. SGR delivers a written summary report to the organization once all reference checks are completed. The timing of reference checks may vary depending on the specific search process and situation. If finalists' names are made public prior to interviews, SGR will typically contact references before the interview process. If the finalists' names are not made public prior to interviews, SGR may wait until the organization has selected its top candidate before contacting references to protect candidate confidentiality.

Step 9: Negotiations and Hiring Process

Determine Terms of an Employment Offer

Upon request, SGR will provide draft employment agreement language and other helpful information to aid in determining an appropriate offer to extend to your preferred candidate.

Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will identify and address any special needs or concerns of the selected candidate, including potential complicating factors. With our experience and preparedness, SGR is equipped to facilitate win-win solutions to resolve negotiation challenges.

Press Release (if requested)

Until employment negotiations are finalized, you should exercise caution to avoid the embarrassment of a premature announcement that may not materialize. It is also considered best practice to notify all senior staff and unsuccessful candidates before any media exposure. SGR will assist in coordinating this process and in crafting any necessary announcements or press releases.

Satisfaction Surveys

SGR is committed to following the golden rule, which means providing prompt, professional and excellent communication while always treating every client with honor, dignity and respect. We request clients and candidates to participate in a brief and confidential survey after the completion of the recruitment process. This valuable feedback assists us in our ongoing efforts to improve our processes and adapt to the changing needs of the workforce.

Post-Hire Services

We offer post-hire services, such as executive coaching, team-building retreats, and performance review assistance at the six-month or one-year mark. For more information or to request a customized proposal, please visit <https://www.governmentresource.com/leadership-development-training-resources>.

Typical Timeline *

The timeline below is an example only, and we will work with you to finalize and approve a timeline, with adjustments made if needed after the position is posted.

Initial Steps Prior to Posting Position:	
<ul style="list-style-type: none"> Contract Execution Kickoff Meeting to Discuss Recruitment Strategy and Timeline Organization/Position Insight and Analysis Stakeholder Interviews and Listening Sessions Deliverable: Draft Recruitment Brochure Deliverable: Recommended Ad Placements Organization Approves Ad Placements Search Committee Reviews and Approves Brochure 	<i>Timing varies and usually takes a minimum of 2-3 weeks.</i>

Task	Week
<ul style="list-style-type: none"> Post Position and Firm up Timeline Recruitment Campaign and Outreach to Prospective Applicants Initial Screening and Review by Executive Recruiter 	Weeks 1-4
<ul style="list-style-type: none"> Search Committee Briefing to Review Applicant Pool and Select Semifinalists 	Week 5
<ul style="list-style-type: none"> Questionnaires Recorded One-Way Semifinalist Interviews Media Searches - Stage 1, as described in Approach/Methodology 	Week 6
<ul style="list-style-type: none"> Deliverable: Semifinalist Briefing Books via Electronic Link Deliverable: Recorded Online Interviews, if applicable 	Week 7
<ul style="list-style-type: none"> Search Committee Briefing to Select Finalists 	Week 8
<ul style="list-style-type: none"> Comprehensive Media Searches - Stage 2, as described in Approach/Methodology Background Investigation Reports Disc Management Assessments (if desired, supplemental cost) First-Year Plan or Other Advanced Exercise (if desired) 	Weeks 9-10
<ul style="list-style-type: none"> Deliverable: Finalist Briefing Books via Electronic Link 	Week 11
<ul style="list-style-type: none"> Face-to-Face Interviews Stakeholder Engagement (if desired) Deliberations Reference Checks (may occur earlier in process) Negotiations and Hiring Process 	Week 12

** Timeline is dependent upon Search Committee availability and Holidays. Organization agrees to timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening; failure to do so, may in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.*

Letter of Acceptance

SGR agrees to the general terms and conditions outlined in the RFP, with the exception of the items listed below:

RFP Exceptions:

- **Exception to SECTION IV.A, 4.1. GENERAL DESCRIPTION OF SERVICES**
J. Conduct a preliminary background check on select candidates, and a more detailed level investigation on the finalists.

Exception: SGR conducts formal background investigation checks for finalist candidates only.

Professional Services Agreement Exceptions:

- **Exception to SECTION 2. TERM OF AGREEMENT:**
The initial term of this Agreement shall be for sixty (60) days from the date of the award. After the initial term, this Agreement may be renewed for ninety (90) days. The maximum term for this Agreement and all renewals is a cumulative term of one-hundred twenty days (120) years.

Exception: We respectfully request that the Agreement shall be effective from the date of the last signature of a party and that the term of the Agreement mirrors the contract term as set forth in the RFP.

CONFLICT OF INTEREST AFFIDAVIT

Virginia
State of Florida: City of Haymarket, Virginia

Before me, the undersigned authority, personally appeared Jeri J. Peters

who was duly sworn, deposes, and states:

1. I am the President of Executive Recruitment of Strategic Government Resources, Inc. with a local office in Lakeland, FL and principal office in Keller, TX.
(City & State) (City & State)
2. The above named entity is submitting an Expression of Interest for the City of New Smyrna Beach project described as RFP 02-24-HR, **Executive Search Firm for City Manager**
3. The Affiant has made diligent inquiry and provides the information contained in this Affidavit based upon his/her own knowledge.
4. The Affiant states that only one submittal for the above project is being submitted and that the above named entity has no financial interest in other entities submitting proposals for the same project.
5. Neither the Affiant nor the above named entity has directly or indirectly entered into any agreement, participated in any collusion, or otherwise taken any action in restraint of free competitive pricing in connection with the entity's submittal for the above project. This statement restricts the discussion of pricing data until the completion of negotiations and execution of the Agreement for this project.
6. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended or otherwise ineligible from participating in contract lettings by any local, state, or federal agency.
7. Neither the entity, nor its affiliates, nor anyone associated with them have any potential conflict of interest due to any other clients, contracts, or property interests for this project.
8. I certify that no member of the entity's ownership, management, or staff has a vested interest in any aspect of or Department of City of New Smyrna Beach.
9. I certify that no member of the entity's ownership or management is presently applying for an employee position or actively seeking an elected position with City of New Smyrna Beach.
10. In the event that a conflict of interest is identified in the provision of services, I, on behalf of the above named entity, will immediately notify City of New Smyrna Beach in writing.

Jeri J. Peters
Typed Name
Jeri Jo Peters
Signed

President of Executive Recruitment
Title
11/27/2023
Dated

Sworn to and subscribed before me this 27th day of November 2023.

Personally known OR produced identification ☒. Identification type:
Driver License

Notary Public: State of Virginia County of Prince William, Virginia

Azeen Azeem

Printed, typed, or stamped commissioned name of notary public

My commission expires: 04/30/2025
Electronic Notary Public

Notarized online using audio-video communication



NON-COLLUSION AFFIDAVIT OF PROPOSER

State of Virginia

County of Prince William, Virginia

Jeri J. Peters, being first duly sworn, deposes and says that:

President of Executive
He/she is Recruitment of Strategic Government Resources, Inc., Proposer that has submitted the attached bid or Request for Qualifications;

He/she is fully informed respecting the preparation and contents of the attached bid and of all pertinent circumstances respecting such bid;

Such bid is genuine and is not a collusive or sham bid;

Neither the said Proposer nor any of its officers, partners, owners, agent representatives, employees, or parties in interest, including this affiant, has in any way colluded, conspired, connived or agreed, directly or indirectly, sought by agreement or collusion or communication or conference with any other Proposer, firm or person, to fix the price or prices in the attached Proposal or of any other Proposer, or to fix any overhead, profit or cost element of the Proposal price or the Proposal price of any other Proposer, or to secure through any collusion, conspiracy, connivance or unlawful agreement any advantage against the CITY OF NEW SMYRNA BEACH, FLORIDA, or any person interested in the proposed Contract; and

The price or prices quoted in the attached Proposal are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Proposer or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

Jeri Jo Peters

Signed

President of Executive Recruitment

Title

Subscribed and sworn to before me this 27th day of November, 2023.



Electronic Notary Public

Title

My Commission Expires: 04/30/2025

Electronic Notary Public

Notarized online using audio-video communication



THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR SUBMITTAL

**SWORN STATEMENT PURSUANT TO SECTION 287.133(3)(A), FLORIDA STATUTES,
ON PUBLIC ENTITY CRIMES**

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. THIS SWORN STATEMENT IS SUBMITTED TO City of New Smyrna Beach

by Jeri J. Peters, President of Executive Recruitment

(Print Individual's Name and Title)

for Strategic Government Resources, Inc.

(Print Name of Entity Submitting Sworn Statement)

whose business is Corporation

and (if applicable) its Federal Employer Identification Number (FEIN) is 460501585

2. I understand that a "public entity crime" as defined in Paragraph 287.133 (1)(g), Florida Statutes, means 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 or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means 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.

4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:

a. A predecessor or successor of a person convicted of a public entity crime; or

b. 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 crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provisions of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders,

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR SUBMITTAL

COMPLIANCE WITH EMPLOYMENT ELIGIBILITY REQUIREMENTS

(§448.095, Florida Statutes – E-Verify)

The E-Verify system is an internet-based system operated by the United States Department of Homeland Security that allows participating employers to electronically verify the employment eligibility of newly hired employees. Florida Statutes §448.095 provides that any person or entity that has entered or is attempting to enter into a contract with the City of New Smyrna Beach to provide labor, supplies or services must register with and use the E-Verify system to verify the work authorization status of all employees hired after January 1, 2021. Further, the consultant must maintain certain required employment compliance records of sub consultants for the duration of the contract with the City of New Smyrna Beach.

Consultant Name: Strategic Government Resources, Inc.

Consultant E-Verify Registration Number: MM9ZBDJ168L8

The undersigned, on behalf of the consultant referenced above, after first being duly sworn, states as follows:

1. That said consultant understands that the consultant must comply with §448.095, Florida Statutes.
2. That the consultant uses the E-Verify system to verify the work eligibility status of employees.
3. That the consultant has enrolled in the E-Verify system under the registration number referenced above and will verify the work eligibility status of employees hired after January 1, 2021 through said registration number throughout the contract period of any and all contracts with the City of New Smyrna Beach.
4. That the consultant will maintain affidavits of sub consultants engaged to perform work on any and all contracts with the City of New Smyrna Beach.
5. That said consultant further understands that violation of §448.095, Florida Statutes may result in lawful termination of a contract by the City of New Smyrna Beach, subjecting the consultant to liability for additional costs incurred by the City of New Smyrna Beach as a result of the termination of the contract.

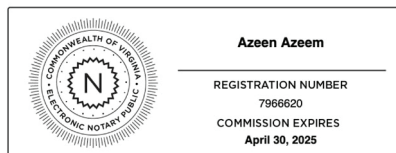
By: Jeri Jo Peters

Print Name:
Jeri J. Peters

Commonwealth of Virginia, county of Prince William

Sworn to and subscribed before me, by () physical presence or (☒) remote audio-visual means, this

27th Day of November, 2023. S/He is personally known to me or has ☒ produced Driver License As identification.



Electronic Notary Public

Notary Public

My commission expires: 04/30/2025

Notarized online using audio-video communication

VENDOR INFORMATION

BID #:	RFP 02-24-HR
BID TITLE:	EXECUTIVE SEARCH FIRM FOR CITY MANAGER

Respondent Information	
Company Name: Strategic Government Resources, Inc.	Federal Employer Identification Number or SS Number: 460501585 DUN Number: 848961111
Mailing Address PO Box 1642	Type of Entity (Circle One) Corporation Partnership Proprietorship Joint Venture
City, State, Zip Code Keller, TX 76244	Incorporated in the State of: Texas
Corporate Address: PO Box 1642	What kind of business: "For Profit" or "Not for Profit" For Profit
City, State, Zip Code Keller, TX 76244	Is Firm in good standing: Yes or No
Telephone No. 817-337-8581	Authorized to transact business in Florida Yes or No
Email Address: JJPeters@GovernmentResource.com	State of Florida Department of State Certificate of Authority Document No: F13000000477
If remittance address is different from the mailing address so indicate below.	
List Principals (Print):	
President: Ron Holifield	Vice President: Jennifer Fadden
Secretary: Melissa Valentine	Treasurer: Jennifer Brohimer
Other: Jeri J. Peters, President of Executive Recruitment	Other:

I certify that this offer is made without prior understanding, agreement, or connection with any corporation, firm or persons submitting an offer for the same materials, supplies, or equipment and is in all respects fair and without collusion or fraud.

I agree to abide by all conditions of this offer and certify that I am authorized to sign this offer for the responder and that the responder is in compliance with all requirements of the competitive solicitation, including but not limited to, certification requirements.

DocuSigned by:
Jeri J. Peters
Authorized Signature

Title: President of Executive Recruitment

Jeri J. Peters
Printed Name

Date: 11/27/2023 | 11:46 AM CST

City of New Smyrna Beach does not discriminate based on age, race, color, sex, religion, national origin, disability or marital status.



CITY OF NEW SMYRNA BEACH VENDOR SUMMARY

TO BE FILLED IN BY FINANCE

DATE RECEIVED: _____
 ENTERED BY: _____
 VENDOR# _____

CHECK ONE: NEW VENDOR: X REVISED VENDOR: _____
 DATE: 11/21/2023
 VENDOR NAME: Strategic Government Resources, Inc.
 VENDOR DBA: _____
 PRODUCT/SERVICE PROVIDED: _____
 DEPARTMENT: Executive Recruitment
 PREPARED BY: Jeri J. Peters

PURCHASE ORDER ADDRESSPO Box 1642

ADDRESS

Keller, TX

CITY/STATE

76244

ZIP CODE

MAILING/REMIT ADDRESSPO Box 1642

ADDRESS

Keller, TX

CITY/STATE

76244

ZIP CODE

PHYSICAL ADDRESSPO Box 1642

ADDRESS

Keller, TX

CITY/STATE

76244

ZIP CODE

COMPANY CONTACT: Jeri J. Peters
 E-MAIL: JJPeters@GovernmentResource.com
 OFFICE PHONE: 817-337-8581
 FAX: N/A
 MOBILE PHONE: N/A
 FEDERAL TAX ID#: 460501585
 DUNS Number: 848961111

STATEMENT OF INSURANCE COMPLIANCE

The undersigned firm agrees to obtain prior to award, if selected, the insurance and levels in accordance to the requirements as set forth in the Invitation for Proposal, Invitation to Bid, or Invitation for Qualifications, or draft agreement, attached hereto.

Policies other than State Issued Worker’s Compensation shall be issued only by companies authorized by maintaining certificates of authority issued to the companies by the Department of Insurance of the State of Florida to conduct business in the State of Florida and which maintain a Rating of “A” or better and a Financial Size category of “VII” or better according to the A.M. Best Company. Policies for Worker’s Compensation may be issued by companies authorized as a group self-insurer by F.S. 440.57, Florida Statutes.

Strategic Government Resources, Inc.
PROPOSER/BIDDER

DocuSigned by:
Jeri J. Peters
AUTHORIZED SIGNATURE

President of Executive Recruitment
OFFICER TITLE

11/21/2023
DATE

END OF SECTION

THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR SUBMITTAL

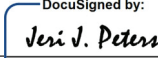
PUBLIC ENTITY CRIME INFORMATION STATEMENT

All invitations to bid as defined by Section 287.012(11), Florida Statutes, requests for proposals as defined by Section 287.012(16), Florida Statutes, and any contract document described by Section 287.058, Florida Statutes, shall contain a statement informing persons of the provisions of paragraph (2)(a) of Section 287.133, Florida Statutes, which reads as follows:

“A person or affiliate who has been placed on the convicted vendor list following a conviction for a public entity crime may not submit a bid on a contract to provide any goods or services to a public entity, may not submit a bid on a contract with a public entity for the construction or repair of public building or public work, may not submit bids on leases of real property to a public entity, may not be awarded or perform work as a contractor, supplier, subcontractor, or CONTRACTOR under a contract with any public entity, and may not transact business with any public entity in excess of the threshold amount provided in Section 287.017, for CATEGORY TWO for a period of 36 months from the date of being placed on the convicted vendor list.”

All vendors who submit a Bid or Request for Proposal to the City of New Smyrna Beach, are guaranteeing that they have read the previous statement, and by signing the bid documents, are qualified to submit a bid under Section 287.133, (2)(a) Florida Statutes.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

<div>DocuSigned by:  662000315F0C180</div> <div>_____ Authorized Signature and Title</div>	<div>President of Executive Recruitment</div> <div>_____ Print Name and Title</div>	<div>Date: 11/21/2023</div> <div>_____ </div>
---	---	--

DISPUTES DISCLOSURE FORM

Answer the following questions by placing an “X” after “YES” or “NO”. If you answer “YES”, please explain in the space provided, or via attachment.

Has your firm or any of its officers, received a reprimand of any nature or been suspended by the Department of Professional Regulation or any other regulatory agency or professional association within the last five (5) years?

YES _____ NO X

Has your firm, or any member of your firm, been declared in default, terminated or removed from a contract or job related to the services your firm provides in the regular course of business within the last five (5) years?

YES _____ NO X

Has your firm had against it or filed any requests for equitable adjustment, contract claims, bid protests, or litigation in the past five (5) years that is related to the services your firm provides in the regular course of business?

YES _____ NO X

If yes, state the nature of the request for equitable adjustment, contract claim, litigation or protest, and state a brief description of the case, the outcome or status of the suit and the monetary amounts or extended contract time involved.

I hereby certify that all statements made are true and agree and understand that any misstatement, misrepresentation, or falsification of facts shall be cause for forfeiture of rights for further consideration of the below advertised solicitation:

Solicitation # RFP 02-24-HR described as:

EXECUTIVE SEARCH FIRM FOR CITY MANAGER

Strategic Government Resources, Inc.
Firm

11/21/2023
Date

DocuSigned by:

Jeri J. Peters

President of Executive Recruitment

Jeri J. Peters, President of Executive Recruitment

Authorized Signature and Title

Printed or Typed Name and Title

***THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR BID**


DRUG-FREE WORKPLACE CERTIFICATION FORM

IDENTICAL TIE BIDS-In accordance with Florida State Statutes Section 287.087, preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids, which are equal with respect to price, quality, and service, are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

1. Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violation of such prohibition.
2. Establishing an on-going drug-free awareness program to inform employees about:
 - a. The dangers of drug abuse in the workplace.
 - b. The employer's policy of maintaining a drug-free workplace.
 - c. Any available drug counseling, rehabilitation, and employee assistance programs, and
 - d. The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace.
3. Making it a requirement that each employee to be engaged in the performance of this contract be given a copy of the statement required by paragraph (a);
4. Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under this contract, the employee will:
 - a. Abide by the terms of the statement; and
 - b. Notify the Employer in writing of any arrest for a violation of a criminal drug statute or driving under the influence no later than five calendar days after such arrest;
5. Notifying the City of New Smyrna Beach, in writing, within 10 calendar days after receiving notice under subparagraph (4)(b) from an employee or otherwise receiving actual notice of such arrest Consultants of arrested employees must provide notice, including position and title to: City Clerk/Administrator, City of New Smyrna Beach, 210 Sams Avenue, New Smyrna Beach, FL 32168.
6. Taking one of the following actions, within 30 calendar days of receiving notice under subparagraph (d)(2), with respect to any employee who is arrested.
 - a. Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended, or
 - b. Requiring such employee to participate satisfactorily in drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State or local health, law enforcement, or other appropriate agency.
7. Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraphs (1), (2), (3), (4), (5) and (6).

As a duly authorized representative of the Vendor, I hereby certify that the Firm will comply with the above certifications.

As the person authorized to sign this statement, I certify that this firm complies fully with the above requirements.

DocuSigned by:


Authorized Signature

Jeri J Peters, President of Executive Recruitment

Print Name and Title

Date: 11/21/2023

****THIS FORM MUST BE COMPLETED AND RETURNED WITH YOUR BID**

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. Strategic Government Resources, Inc.	
2 Business name/disregarded entity name, if different from above SGR	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input checked="" type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► _____ Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ► _____	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. PO Box 1642	Requester's name and address (optional)
6 City, state, and ZIP code Keller, TX 76244	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
[]	[]	[]	-	[]	[]	-	[]	[]	[]
or									
Employer identification number									
4	6	-	0	5	0	1	5	8	5

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ► <i>Jennifer Brohmer</i>	Date ► <i>1/4/2023</i>
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.



[Department of State](#) / [Division of Corporations](#) / [Search Records](#) / [Search by FEI/EIN Number](#) /

Detail by FEI/EIN Number

Foreign Profit Corporation

STRATEGIC GOVERNMENT RESOURCES, INC.

Filing Information

Document Number F13000000477

FEI/EIN Number 46-0501585

Date Filed 01/31/2013

State TX

Status ACTIVE

Principal Address

6502 Glen Abbey St
Abilene, TX 79606

Changed: 02/21/2023

Mailing Address

PO Box 1642
Keller, TX 76244

Changed: 02/21/2023

Registered Agent Name & Address

CORPORATION SERVICE COMPANY
1201 HAYS STREET
TALLAHASSEE, FL 32301-2525

Name Changed: 07/19/2021

Address Changed: 07/19/2021

Officer/Director Detail

Name & Address

Title PRESIDENT, Treasurer

HOLIFIELD, RON
PO Box 1662
Keller, TX 76244

Title SECRETARY

VALENTINE, MELISSA
PO Box 1662
Keller, TX 76244

Annual Reports

Report Year	Filed Date
2021	04/24/2021
2022	04/24/2022
2023	02/21/2023

Document Images

02/21/2023 -- ANNUAL REPORT	View image in PDF format
04/24/2022 -- ANNUAL REPORT	View image in PDF format
07/19/2021 -- Reg. Agent Change	View image in PDF format
04/24/2021 -- ANNUAL REPORT	View image in PDF format
05/14/2020 -- ANNUAL REPORT	View image in PDF format
03/16/2019 -- ANNUAL REPORT	View image in PDF format
04/06/2018 -- ANNUAL REPORT	View image in PDF format
04/13/2017 -- ANNUAL REPORT	View image in PDF format
04/22/2016 -- Reg. Agent Change	View image in PDF format
04/08/2016 -- ANNUAL REPORT	View image in PDF format
02/25/2015 -- ANNUAL REPORT	View image in PDF format
03/05/2014 -- ANNUAL REPORT	View image in PDF format
01/31/2013 -- Foreign Profit	View image in PDF format



**City Commission Special Meeting
Wednesday, January 10, 2024 at 5:15 PM
Minutes**

I. CALL TO ORDER

Having been duly advertised as required by law, the special meeting of the City Commission of the City of New Smyrna Beach, Florida, was held on Wednesday, January 10, 2024 at the City Commission Chambers, 214 Sams Avenue, New Smyrna Beach, Florida 32168.

Mayor Fred E. Cleveland called the special meeting to order at 5:15 PM.

Present: Mayor Fred E. Cleveland, Vice Mayor Valli Perrine, Commissioner Randy Hartman, Commissioner Lisa Martin and Commissioner Jason McGuirk

II. PUBLIC PARTICIPATION

No action

III. SPECIAL MEETING

III.A Executive Search Firm Presentations for RFP Selection

Mayor Cleveland explained that each presenter would be allotted fifteen minutes to outline their presentation and fifteen minutes to answer questions. He shared that there would be ten minutes for the City Commission to discuss in between presentations.

Colin Baenziger, President of Colin Baenziger & Associates outlined a presentation.

Doug Thomas, Executive Vice President of Recruitment & Leadership Development at Strategic Government Resources, Inc. outlined a presentation.

Jim Dinneen, President of GovHRUSA, LLC outlined a presentation.

Bob Slavin, President and Barbara Lipscomb, Managing Consulting of Slavin Management Consultants outlined a presentation.

Mayor Cleveland opened the floor for nominations.

- Commissioner Martin nominated Strategic Government Resources (SGR)
- Commissioner McGuirk nominated Slavin Management Consultants

Mayor Cleveland closed the floor for nominations.

City Clerk McQuillen distributed a ballot. She instructed the Commission to select one of the two nominees and initial their ballot.

The voting ballot results were:

- Commissioner Perrine, Commissioner Martin, Mayor Cleveland and Commissioner Hartman selected Strategic Government Resources (SGR)
- Commissioner McGuirk selected Slavin Management Consultants

Strategic Government Resources (SGR) was the executive search firm selected 4-1, by majority vote.

IV. COMMISSION COMMENTS

No action

V. ADJOURNMENT

As there was no further business to discuss, Mayor Cleveland adjourned the special meeting at 8:58 PM.

**Strategic Government Resources, Inc.,
RFP 02-24-HR, Executive Search Firm For City Manager**

THIS AGREEMENT is made and entered into this _____ day of _____, 2024, by and between **Strategic Government Resources, Inc.**, duly authorized to conduct business in the State of Florida and whose address is **6502 Glen Abbey Street, Abilene, Texas, 79606**, hereinafter, called “CONSULTANT,” and the **CITY OF NEW SMYRNA BEACH**, a political subdivision of the State of Florida, whose address is 210 Sams Ave., New Smyrna Beach, FL, hereinafter called “CITY.”

SECTION 1. AGREEMENT. The terms of this Agreement, together with the incorporation of the terms and conditions of the **RFP 02-24-HR, Executive Search Firm For City Manager, FOR THE CITY OF NEW SMYRNA BEACH** and any exhibits, schedules, and attachments hereto, and any and all amendments relating to same, and any and all submittals from CONSULTANT, constitute the entire Agreement between the City and CONSULTANT. This Agreement is the final, complete and exclusive expression of the terms and conditions of the parties’ Agreement. Any and all prior agreements, representations, negotiations, and understandings made by the parties, oral or written, expressed or implied, are hereby superseded and merged herein.

SECTION 2. TERM OF AGREEMENT. Unless sooner terminated, this agreement shall terminate at such time as the services are completed and the requirements of this Agreement are satisfied. Consultant agrees to perform the services substantially in the timeframe projected in the approved proposal.

SECTION 3. DESCRIPTION OF SERVICES. The Consultant agrees to perform the services outlined in the advertised solicitation document titled **RFP 02-24-HR, Executive Search Firm For City Manager**, and in the Consultant’s submitted Proposal.

The Consultant shall diligently and in a professional and timely manner perform and provide these services. Unless modified in writing by the parties hereto, the duties of the Consultant shall not be construed to exceed the provision of the services pertaining to this Agreement.

The City and Consultant agree that there may be certain additional services required to be performed by the Consultant during the performance of the contract that cannot be defined sufficiently at the time of execution of this Agreement. These services shall be authorized in writing as an amendment to the contract and may contain additional instructions or provide specifications upon certain aspects of this Agreement pertaining to the work to be undertaken.

SECTION 4. COMPENSATION. For Services rendered, the CITY shall pay the CONSULTANT based on their fee schedule provided. Unless otherwise agreed in a Scope of Services, the CONSULTANT shall invoice the City monthly based upon the CONSULTANT’s fees for services completed during the billing period.

SECTION 5. COMPONENT PARTS OF THE CONTRACT. This Contract consists of the following contract documents, all of which are hereby made a part hereof as if herein set out in full and all of which are familiar to the Contractor:

- A. City Advertised Bid
- B. Award Bid Proposal
- C. Certificate of Insurance
- D. Presentation of Services

SECTION 6. CONTROLLING LAW, VENUE, AND ATTORNEY'S FEES. This Agreement is to be governed, construed, and interpreted by, through and under the laws of Florida. Venue for any litigation between the parties to this Agreement shall be in the County of Volusia, Florida and any trial shall be non-jury. The prevailing party in any litigation arising from or related to this Agreement shall be reimbursed reasonable attorney fees and costs, including all fees and costs of an appeal.

SECTION 7. RIGHTS AT LAW RETAINED. The rights and remedies of the City, provided for under this Agreement, are in addition and supplemental to any other rights and remedies provided by law.

SECTION 8. NOTICES. Whenever either party desires to give notice unto the other, it must be given by written notice, sent by registered or certified United States mail, return receipts requested, addressed to the party for whom it is intended at the place last specified. The place for giving of notice shall remain such until it shall have been changed by written notice in compliance with the provisions of this Section. For the present, the parties designate the following as the respective places for giving of notice, to-wit:

For City:

Kelly McQuillen, City Clerk
City of New Smyrna Beach
210 Sams Ave.
New Smyrna Beach, FL 32138
(386)410-2637

For Consultant:

Jeri J. Peters
Strategic Government Resources, Inc.,
6502 Glen Abbey Street
Abilene, Texas, 79606
(817)337-8581

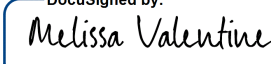
SECTION 9. MODIFICATIONS TO AGREEMENT. This Agreement and any exhibits, amendments and schedules may only be amended, supplemented, modified or canceled by a written instrument duly executed by both parties hereto of equal dignity herewith.

SECTION 10. SEVERABILITY. If during the term of this Agreement, it is found that a specific clause or condition of this Agreement is illegal under federal or state law, the remainder of the Agreement not affected by such a ruling shall remain in force and effect.

SECTION 11. WAIVER OF JURY TRIAL. The City and Consultant have specifically waived the right to a jury trial concerning any disputes which may arise concerning this agreement.

SECTION 12. EFFECT OF FAILURE TO INSIST ON STRICT COMPLIANCE WITH CONDITIONS. The failure of either party to insist on strict performance of any covenant or condition of this contract, or to exercise any option herein contained, shall not be construed as a waiver of such covenant, condition, or option in any other instance. This contract cannot be changed or terminated orally.


IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the date written above for execution by the City of New Smyrna Beach.

ATTEST
DocuSigned by:

18343AC86660434...

Authorized Signature

Melissa Valentine, Corporate Secretary

Print Name and Title

Strategic Government Resources, Inc.,
DocuSigned by:

5629B031BF0F460...

Authorized Signature

Jeri J. Peters, President of Executive Recruitment

Print Name and Title

Date: 1/18/2024 | 10:07 AM CST

ATTEST

Kelly McQuillen, City Clerk

CITY OF NEW SMYRNA BEACH

Fred E. Cleveland, Mayor

Date: _____

For the use and reliance of the City of New Smyrna Beach only. Approved as to form and legal sufficiency.

Carrie Avallone City Attorney

Dated: _____

**Strategic Government Resources, Inc.,
RFP 02-24-HR, Executive Search Firm For City Manager**

THIS AGREEMENT is made and entered into this _____ day of _____, 2024, by and between **Strategic Government Resources, Inc.**, duly authorized to conduct business in the State of Florida and whose address is **6502 Glen Abbey Street, Abilene, Texas, 79606**, hereinafter, called “CONSULTANT,” and the **CITY OF NEW SMYRNA BEACH**, a political subdivision of the State of Florida, whose address is 210 Sams Ave., New Smyrna Beach, FL, hereinafter called “CITY.”

SECTION 1. AGREEMENT. The terms of this Agreement, together with the incorporation of the terms and conditions of the **RFP 02-24-HR, Executive Search Firm For City Manager, FOR THE CITY OF NEW SMYRNA BEACH** and any exhibits, schedules, and attachments hereto, and any and all amendments relating to same, and any and all submittals from CONSULTANT, constitute the entire Agreement between the City and CONSULTANT. This Agreement is the final, complete and exclusive expression of the terms and conditions of the parties’ Agreement. Any and all prior agreements, representations, negotiations, and understandings made by the parties, oral or written, expressed or implied, are hereby superseded and merged herein.

SECTION 2. TERM OF AGREEMENT. Unless sooner terminated, this agreement shall terminate at such time as the services are completed and the requirements of this Agreement are satisfied. Consultant agrees to perform the services substantially in the timeframe projected in the approved proposal.

SECTION 3. DESCRIPTION OF SERVICES. The Consultant agrees to perform the services outlined in the advertised solicitation document titled **RFP 02-24-HR, Executive Search Firm For City Manager**, and in the Consultant’s submitted Proposal.

The Consultant shall diligently and in a professional and timely manner perform and provide these services. Unless modified in writing by the parties hereto, the duties of the Consultant shall not be construed to exceed the provision of the services pertaining to this Agreement.

The City and Consultant agree that there may be certain additional services required to be performed by the Consultant during the performance of the contract that cannot be defined sufficiently at the time of execution of this Agreement. These services shall be authorized in writing as an amendment to the contract and may contain additional instructions or provide specifications upon certain aspects of this Agreement pertaining to the work to be undertaken.

SECTION 4. COMPENSATION. For Services rendered, the CITY shall pay the CONSULTANT based on their fee schedule provided. Unless otherwise agreed in a Scope of Services, the CONSULTANT shall invoice the City monthly based upon the CONSULTANT’s fees for services completed during the billing period.

SECTION 5. COMPONENT PARTS OF THE CONTRACT. This Contract consists of the following contract documents, all of which are hereby made a part hereof as if herein set out in full and all of which are familiar to the Contractor:

- A. City Advertised Bid
- B. Award Bid Proposal
- C. Certificate of Insurance
- D. Presentation of Services

SECTION 6. CONTROLLING LAW, VENUE, AND ATTORNEY'S FEES. This Agreement is to be governed, construed, and interpreted by, through and under the laws of Florida. Venue for any litigation between the parties to this Agreement shall be in the County of Volusia, Florida and any trial shall be non-jury. The prevailing party in any litigation arising from or related to this Agreement shall be reimbursed reasonable attorney fees and costs, including all fees and costs of an appeal.

SECTION 7. RIGHTS AT LAW RETAINED. The rights and remedies of the City, provided for under this Agreement, are in addition and supplemental to any other rights and remedies provided by law.

SECTION 8. NOTICES. Whenever either party desires to give notice unto the other, it must be given by written notice, sent by registered or certified United States mail, return receipts requested, addressed to the party for whom it is intended at the place last specified. The place for giving of notice shall remain such until it shall have been changed by written notice in compliance with the provisions of this Section. For the present, the parties designate the following as the respective places for giving of notice, to-wit:

For City:

Kelly McQuillen, City Clerk
City of New Smyrna Beach
210 Sams Ave.
New Smyrna Beach, FL 32138
(386)410-2637

For Consultant:

Jeri J. Peters
Strategic Government Resources, Inc.,
6502 Glen Abbey Street
Abilene, Texas, 79606
(817)337-8581

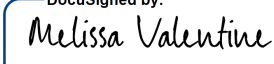
SECTION 9. MODIFICATIONS TO AGREEMENT. This Agreement and any exhibits, amendments and schedules may only be amended, supplemented, modified or canceled by a written instrument duly executed by both parties hereto of equal dignity herewith.

SECTION 10. SEVERABILITY. If during the term of this Agreement, it is found that a specific clause or condition of this Agreement is illegal under federal or state law, the remainder of the Agreement not affected by such a ruling shall remain in force and effect.

SECTION 11. WAIVER OF JURY TRIAL. The City and Consultant have specifically waived the right to a jury trial concerning any disputes which may arise concerning this agreement.

SECTION 12. EFFECT OF FAILURE TO INSIST ON STRICT COMPLIANCE WITH CONDITIONS. The failure of either party to insist on strict performance of any covenant or condition of this contract, or to exercise any option herein contained, shall not be construed as a waiver of such covenant, condition, or option in any other instance. This contract cannot be changed or terminated orally.

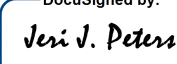
IN WITNESS WHEREOF, the parties hereto have made and executed this Agreement on the date written above for execution by the City of New Smyrna Beach.

ATTEST
DocuSigned by:

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Authorized Signature

Melissa Valentine, Corporate Secretary

Print Name and Title

Strategic Government Resources, Inc.,
DocuSigned by:

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Authorized Signature

Jeri J. Peters, President of Executive Recruitment

Print Name and Title

Date: 1/18/2024 | 10:07 AM CST

ATTEST

Kelly McQuillen, City Clerk

CITY OF NEW SMYRNA BEACH

Fred E. Cleveland, Mayor

Date: _____

For the use and reliance of the City of New Smyrna Beach only. Approved as to form and legal sufficiency.

Carrie Avallone City Attorney

Dated: _____