

***Proposal for Executive Search Services***

City Manager  
City of Novi, Michigan

February 2014

Strategic Government Resources

Ron Holifield, Principal  
PO Box 1642  
Keller, Texas 76244  
214-676-1691

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





February 24, 2014

Ms. Tia Gronlund-Fox  
Director of Human Resources  
City of Novi  
45175 Ten Mile  
Novi, Michigan 48375

Dear Ms. Gronlund-Fox:

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

SGR is widely recognized as one of the leading local government executive search firms, and many of our clients have used our services for multiple key positions, reflecting the quality of our work and the long-term nature of our relationships. SGR has the unique ability to provide a personalized and comprehensive search service to meet your needs.

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

- SGR's website, where this position would be posted, receives over 23,000 local government officials visiting it each month, with over 210,000 page hits per month – more than any other local government search firm website in the nation.
- SGR's job board (separate website), where this job will also be posted, is the largest local government job board in the nation, with over 16,000 local government job seekers visiting each month, and over 1,200 jobs listed at any given time.
- My "10 in 10 Leadership and Innovation Update" reaches over 60,000 of the most innovative and leading edge thinkers in local government in the nation each week. This position would also be posted in that newsletter and no other search firm has anything similar to reach the real opinion leaders in all 50 states.
- SGR has formal collaborative training partnerships with the Maryland Municipal League, the Ohio City/County Management Association, the Missouri Municipal League, the Oklahoma Municipal League, and the National Public Employers Labor Relations Association.
- I speak at an average of one state or national conference 3-4 weeks, providing higher visibility and a stronger network among leading financial and municipal officials than any other firm comes close to.
- SGR trains approximately 800 local government employees each month in live training classes.

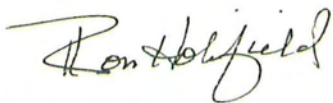
- SGR has almost 300 local government clients in 40 states for our recruitment, training, and leadership development business lines combined.
- SGR provides the most comprehensive background checks, media searches, and reference checks in the industry. We do everything possible to eliminate the chance for surprises later in the process, and we have never had a client embarrassed by surprises about one of our candidates.
- SGR has a track record of confidentiality and of providing wise counsel to candidates and next generation leaders. We have earned their trust. As a result, SGR is typically able to get exceptional prospects to become candidates, even if they have declined to become involved in other search processes, merely because candidates trust SGR to assess the situation well, to communicate honestly and bluntly, and to maintain their confidentiality.

Of course with all of that, only one thing matters... results! We are so confident of our ability to deliver exceptional results that SGR offers the strongest guarantee in the search industry. If a candidate selected in our process leaves in less than two years, for any reason whatsoever, we will conduct the search again for no additional professional fee, no questions asked.

This proposal lists all of our clients, and we welcome you to call any of them blind. The simple fact is that no other firm can touch our reputation for being trusted by both clients and candidates, and for successful long term placements.

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

Respectfully submitted,



Ron Holifield  
Chief Executive Officer  
SGR Executive Search  
Ron@GovernmentResource.com  
214-676-1691

## Table of Contents

<b>Tab 1</b>	<b>Company Contact Information</b>
<b>Tab 2</b>	<b>Company Profile</b>
<b>Tab 3</b>	<b>Unique Qualifications</b>
<b>Tab 4</b>	<b>Key Personnel for this Project (Bios and Resumes)</b>
<b>Tab 5</b>	<b>Project Methodology</b>
<b>Tab 6</b>	<b>Proposed Timeline</b>
<b>Tab 7</b>	<b>Project Cost</b>
<b>Tab 8</b>	<b>Provision of Service Guarantee</b>
<b>Tab 9</b>	<b>References</b>
<b>Tab 10</b>	<b>List of Position-Specific Searches and Client List</b>
<b>Tab 11</b>	<b>SGR Equal Employment Opportunity Statement</b>
<b>Tab 12</b>	<b>Recruitment of Minority and Female Government Executives</b>
<b>Tab 13</b>	<b>Unsolicited Feedback</b>
<b>Tab 14</b>	<b>Sample Position Profile Brochure</b>
<b>Tab 15</b>	<b>Sample Comprehensive Background Screening Report</b>
<b>Tab 16</b>	<b>Sample DiSC Management Profile Report</b>

## Contact Information

### Contact Information for Binding Official / Primary Contact

---

Ron Holifield, CEO  
Strategic Government Resources

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

### Alternate Contact

---

Cyndy Brown, Director of Executive Search  
Strategic Government Resources

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

## Company Profile

### Background

Strategic Government Resources (SGR) was founded in 1999 and is fully owned by former City Manager Ron Holifield.

Ron spent two high profile decades in city management, which included service as City Manager in several Texas cities. He left city management in 1996 and purchased Government Relations Specialists, a small company that specialized in representing companies that do business with government at all levels. In a little over three years, he doubled the size of the company, growing it into one of the 50 largest lobby firms in Texas. However, Ron missed the sense of making a difference that city management had provided. In response, he sold that company in 1999 and founded SGR for the express purpose of helping to transform local government through employee recruitment, selection, assessment, training, development, coaching, and career path planning. SGR is organized into three primary business lines, Executive Recruitment, Employee Development, and Consulting.

### Office Locations

SGR's corporate headquarters is in the Dallas/Fort Worth Metro area in Keller, Texas. SGR also has satellite offices in Austin, Texas; Sugar Land, Texas; Fort Myers, Florida; Kissimmee, Florida; Chicago, Illinois; Norman, Oklahoma; and, Stillwater, Oklahoma.

### SGR Executive Search Team

- Ron Holifield, Chief Executive Officer
- Cyndy Brown, Director of Executive Search
- Mike Tanner, Senior Vice President, Executive Search
- Gary Holland, Senior Vice President, Executive Search
- Tommy Ingram, Senior Vice President, Executive Search
- Tom Muehlenbeck, Senior Vice President, Executive Search
- Chester Nolen, Senior Vice President, Executive Search
- Bill Peterson, Senior Vice President, Executive Search
- Ron Robinson, Senior Vice President, Executive Search

## Unique Qualifications

### Marketing and Networking

- SGR's 10 in 10 Leadership and Innovation e-newsletter, where this position will be announced, reaches over 60,000 subscribers.
- SGR has a database of over 5,000 city management professionals.
- SGR has formal collaborative training partnerships with the Maryland Municipal League, the Ohio City/County Management Association, the Missouri Municipal League, the Oklahoma Municipal League, and the National Public Employers Labor Relations Association.
- SGR trains approximately 800 local government employees each month in live training classes.
- SGR has almost 300 local government clients in 40 states for our recruitment, training, and leadership development business lines combined.

### Comprehensive Needs Assessment

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

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

### The Network

SGR maintains one of the most extensive networks of local government professionals in the nation. For instance, CEO Ron Holifield sends out a weekly e-newsletter that reaches of 60,000 local government professionals. In addition, each executive search project manager has years of experience in local government and a national network of relationships. The entire group works as a team to leverage their networks to assist with each search. SGR team members are active on a national basis, in both local government organization and professional associations. Many SGR staff members frequently speak and write on issues of interest to local government executives.

Only SGR can work all of the relevant networks as a peer and insider, resulting in better recruitment, better investigation, better intelligence, better information, and better final decisions.

**Accessibility**

Your search will be handled directly by Gary Holland, Senior Vice President. Gary is accessible at all times throughout the search process and can be reached by candidates or clients, even at night and on weekends, on cell phone, home phone, or via email.

**Trust of Candidates**

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

**Responsive to You**

When a problem arises or you have questions, you can count on SGR staff to be available, to be prepared, and to respond promptly.

**Listening to Your Unique Needs**

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

**No Surprises**

One of the worst things that can happen for you is to get surprised with undisclosed information about a finalist, especially if the surprise comes in the form of a newspaper article that you find out about from your critics. SGR does thorough background work on candidates to minimize the chance for surprises and has never had one single client embarrassed by surprises about one of our candidates.

**Recruitment Videos**

SGR offers the option of developing a custom video recruitment ad for posting on YouTube and linking to the video in other media sources. A sample SGR recruitment video for the City of Plano, Texas, can be viewed at <http://tinyurl.com/PlanoFC>.

**Comprehensive Background Investigation Reports**

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



**Recorded Online Interviews with Candidates**

SGR offers the option of recording short videos of candidates answering 3-6 questions. This allows the search committee to see candidates in an interview situation prior to the finalist stage of the search process and without having to pay for travel expenses.

**Comprehensive Media Reports**

SGR produces a comprehensive media search report on each finalist candidate. Each Media Report is compiled from information gathered using our proprietary online search process. This is not an automated process, and produces far superior results than a standard media or simple Google search. The report length may be as long as 350 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. No other firm provides such comprehensive media reports.

**Psychometric Assessments**

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

**Equal Opportunity Commitment**

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

**Superior Experience and Track Record**

SGR has a reputation for excellence among both candidates and clients. Many of our clients have used our services for multiple key positions, reflecting the high quality of our work and the long-term nature of our relationships. For example, when we conducted the Amarillo City Manager search, the local newspaper editorialized that our search process "approached perfection" and praised the elected officials for conducting such a rigorous process.

**Practicing the Golden Rule**

Because of our years of experience in local government, SGR understands what you are experiencing, how as executive search consultants we can make your life easier, and what will frustrate you. In short, SGR believes in the Golden Rule as a matter of philosophy, but SGR is able to practice the Golden Rule as a matter of experience.

## **Cost**

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

## **Emerging Leaders**

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

- Ron Holifield recently spoke at the Colorado City & County Management Association and the National Public Employer Labor Relations Association (NPELRA) on how to build leadership development programs.
- In 2012, Ron was invited to speak at the Oregon Emerging Leaders group.
- SGR collaborated with the City of Colleyville, Texas, in developing a highly successful emerging leader program that was recognized by TML for its success.
- SGR has also assisted the City of Arlington, Texas, and the North Central Texas Council of Governments in creating leadership development programs.

## **Five Way Guarantee**

SGR provides the strongest guarantee in the industry.

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

## Key Personnel for this Project

### **Ron Holifield, CEO**

Ron Holifield spent 17 high profile years in city management before entering the private sector. He served as Assistant City Manager in Plano, Texas, City Manager in Garland, Texas, and City Manager in three other mid-size and smaller cities. Ron is a frequent speaker at city management conferences nationwide. In addition, he has written numerous articles and was a periodic contributor to *Texas City Manager Magazine on Innovations That Make a Difference*. Ron has served on numerous state and national committees and is an active member of the International City/County Management Association (ICMA), the Texas City Management Association (TCMA), Urban Management Assistants of North Texas (UMANT), and several other regional organizations. He holds a BA from Abilene Christian University, and an MPA from Texas Tech.

Ron brings strength to the executive recruitment profession with his extensive experience as a city manager. Numerous professionals around the nation have worked with Ron over his long career, giving SGR a network among municipal management professionals that is unequaled. Ron also brings a unique ability to evaluate candidates from the perspective of a city manager and assist city officials in effectively understanding not just qualifications, but issues of management style, reputation, and philosophical compatibility.

### **Gary Holland, Senior Vice President**

Gary Holland previously served for six years as Senior Vice President with the Mercer Group providing executive search and management consulting for local governments across the nation. Prior to that, he served over 17 years with the City of Kissimmee, Florida, as Assistant to the City Manager, Assistant City Manager and finally Deputy City Manager.

Before his distinguished career in City Management, Gary had also served as a Local Government Specialist with Oklahoma State University focusing on technology transfer and community development. In that role, he participated with Public Technology Inc. in a three year program as the technology transfer agent in a four state region. He was also a charter member of the County Government Training Program established by the Oklahoma Legislature to develop and present educational programs to elected county officials throughout the State.

Gary has authored a wide variety of publications on local government topics and has presented at numerous state and national conferences on local government management topics with a particular emphasis on innovative technologies.

Gary holds a Bachelor's of Business Administration in Marketing and Management from the University of Oklahoma and a Master's of Business Administration in Management and Finance from Oklahoma State University.

## **Ronald Mack Holifield**

Strategic Government Resources, P.O. Box 1642, Keller, Texas 76248

Cell: 214-676-1691, [Ron@GovernmentResource.com](mailto:Ron@GovernmentResource.com)

### **PROFESSIONAL HISTORY**

---

#### **Strategic Government Resources – Owner & CEO**

##### **January 1999 to Present**

- Owner and CEO of this strategic management firm, helping local governments recruit, assess and develop innovative leaders. Clients have included over 350 local governments as well as NASA, TXU, Oncor, Accountability International, SportsCenter, Pro Players Foundation, HVJ Engineers, Waste Management and others.
- SGR is the largest provider of live and online training in the nation designed specifically for local government, training over 1,000 local government employees every month in 41 states.
- As CEO of Strategic Government Resources, I have been interviewed and/or quoted by various news publications and media outlets on issues related to local government. These publications include: National Public Radio, Texas City Manager Magazine, Texas Town and City, Government Technology Magazine, GovWire Online Magazine, Federal Computer Week Magazine, CIO Magazine, Dallas Morning News, Dallas Business Journal, Plano Star Courier, DFW Tech Biz, Today Newspapers, Focus on the News, D Magazine, International Association of Chiefs of Police Journal, WOAI TV and KRLD and KTET Radio, as well as the ABC and NBC affiliates in Tulsa and WAMU radio in Washington, DC.

#### **Government Relations Specialists – Owner & CEO**

##### **August 1996 to September 2001**

- Owner and CEO of this 20 year old governmental consulting firm, specializing in representing businesses doing business with government and in legislative advocacy efforts.
- During my tenure as owner and CEO, the business doubled in size, becoming the 49<sup>th</sup> largest lobby firm in Texas, after which I sold it to one of my employees so that I could focus more of my efforts on the launch of SGR.
- Major clients included American Express, Aramark, Automated Licensing Systems, Children's Comprehensive Services, IBM, Quorum Health Group, Library Systems and Services, PeopleSoft, SCT, Space Imaging, TXI, Verizon, and Xerox as well as many other Fortune 500 firms.

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

- City Manager of this highly diverse suburban community, located 20 minutes south of downtown Dallas.
- I was hired to lead a rapid cultural change at City Hall, with a specific challenge to transform the organization from one known for being highly bureaucratic, stagnant, and ineffective in economic development, into one known for being aggressively customer service driven, highly successful in the economic development arena, and operating in a very cost effective manner.
- Significant accomplishments in Economic Development:
  - Named by Texas Business Magazine as a top 20 Texas city to relocate a business.
  - Named by Texas Business Magazine as one of the “Best Run Cities in Texas.”
  - Named by Texas Outlook Magazine as a top 25 city for economic development.
- Other significant achievements:
  - Dramatic improvements in all financial operating systems.
  - Complete overhaul of the city’s personnel systems.
  - Implementation of the city’s first comprehensive long range CIP.
  - Substantial increases in the city’s fund balances.
  - Increase in commercial building permits in excess of 1,000% over previous year.
  - Lowest crime rate of any major city in the Dallas-Fort Worth Metroplex.

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

- City Manager of this rapidly growing city, which owns and operates an electric production and distribution system, a regional wastewater treatment system, a regional landfill, and a heliport, and offers a variety of social services and strong cultural arts. The ninth largest city in Texas, Garland’s population was in excess of 220,000 with over 2,300 employees, and an annual operating and capital budget in excess of \$350 million.
- I was hired in 1991 to take this very traditional manufacturing-based community and rapidly position it as a statewide leader, transforming its one-dimensional image and reputation as a blue-collar suburb into that of a leading first tier city.
- Specific City Council goals established and achieved during my tenure include:
  - *Financial Management* – Strengthen the financial position of the City, and overhaul the City’s financial and budgetary systems to make them more accountable and understandable; make Garland’s cost of services more competitive with area cities; minimize dependence on debt; and, operate City utilities as if they were private enterprises.
  - *Economic Development* – Reinvigorate the City’s economic development program, positioning Garland as the statewide leader in demonstrating that

strong environmental policies and strong economic growth efforts are compatible; and enhance citywide housing and neighborhood standards.

- *Quality of Life* – Provide Garland with a national profile in the Arts; dramatically improve Garland’s commitment to basic infrastructure repair and replacement; make Garland the safest city in the Metroplex; and, revitalize downtown.
- *Organizational Excellence* – Establish an organization whose diversity reflects the community; establish routine evaluation of privatization alternatives; introduce benchmarking as the basis for effective performance measurement; dramatically improve citizen communication and trust in the integrity of local government; create an innovation-minded organization, known for a results-orientation, and capable of overcoming traditional bureaucratic mind-sets and obstacles.

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

- Served in a variety of capacities in this rapidly growing, premier city, including: Assistant City Manager of Community Services, Assistant City Manager of Administration, Acting Assistant City Manager for Development, and Assistant to the City Manager.
- Significant accomplishments while with Plano include:
  - Designed a program that doubled mid- and upper-level management minority and female representation in four years.
  - Designed a Disadvantaged Business Purchasing Program that dramatically increased minority business contracts without quotas.
  - Served as Project Manager for a \$19.5 million Civic Center Project, bringing it in \$2 million under budget.
  - Assisted in negotiating details of the JC Penney headquarters relocation from New York City to Plano.
  - Created Plano’s first Convention/Visitor’s Bureau that exceeded year six sales and bookings projections in the first year.
  - Initiated Plano’s first Neighborhood Integrity Program.
  - Creatively designed construction projects for EDS and JC Penney to achieve a \$750,000 sales tax windfall for the city.
  - Designed an Employee Wellness Program which resulted in participant health care costs equaling only one-third those of non-participants.

**City of Farmersville, Texas – City Manager  
1984 to 1986**

- First City Manager of this full service city, which operates an electric distribution system and two city lakes.
- Major achievements were in the areas of growth management, infrastructure improvements and municipal finance.

**City of Sundown, Texas – City Manager  
1982 to 1984**

- City Manager of this full service city, which operates a natural gas distribution system and a municipal golf course.
- Major achievements were in the areas of economic development, public/private partnerships, infrastructure improvements, and municipal finance.

**City of Lubbock, Texas – City Administrative Intern to the City Manager  
1981 to 1982**

- Administrative Intern to the City Manager of this major city, which operates a municipally owned electric utility.
- Primary accomplishments were in the area of performance measurement.

**EDUCATION**

---

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

**MAJOR AWARDS for Municipal Organizations Managed**

---

- 3CMA Economic Development Marketing Campaign Savvy Award Certificate of Excellence for International Development and Local Realtor Ads - Garland
- International Association of Chief's of Police, Excellence in Policing Award for Neighborhood Service Team - Garland
- Finalist, Governor's Environmental Excellence Award - Garland
- Texas Natural Resource Conservation Commission Award for Excellence - Garland
- American Society of Landscape Architects, Texas Chapter, Environmental Stewardship Award for Garland's Spring Creek Forest Preserve - Garland
- Dallas Business Journal, "Metroplex Real Estate Deal of the Year (Existing Building)," – Garland
- Dallas Business Journal "Metroplex Real Estate Deal of the Year (New Construction)," - Garland
- GFOA Award for Distinguished Budget Presentation, every year, 1987-1996
- GFOA Certificate of Achievement for Excellence in Financial Reporting, 1987-1991

**PROFESSIONAL PARTICIPATION**

---

- Author, "the 16%" weekly blog, 2013
- Author, "Fourth Dimension Leadership", 2010
- Member, International City/County Management Association (ICMA), 1982-present
- Member, Texas City Management Association (TCMA), 1982-present
- Member, Texas Municipal Human Resources Association, 2006 - present
- Member, Governmental Finance Officers Association, 2010 - present

**PREVIOUS PROFESSIONAL PARTICIPATION**

---

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

**SPEAKING ENGAGEMENTS**

---

- National Public Employers Labor Relations Association Annual Conference, 2013
- American Public Works Association Regional Conference, 2013
- Texas Recreation and Parks Association Annual Conference, 2013
- Colorado City County Management Association Annual Conference, 2013
- Kansas City County Management Association Annual Conference, 2012
- National Parks and Recreation Management School, 2012



- Texas City Management Study Group, 2012
- International City County Management Association Annual Conference, 2012
- National Procurement Institute, 2012
- Missouri Municipal League Annual Conference, 2012
- Texas City Clerk's Association Annual School, 2012
- Texas County Clerk's Association Annual School, 2012
- Kansas Governmental Finance Officers Association Annual Conference, 2011
- Texas City Management Association Annual Conference, 2010
- Public Risk Management Assoc. Annual Conference, 2010
- Oklahoma City Manager's Association Annual Conference, 2010
- Northwest States City Management Association Annual Conference, 2010
- Ohio City/County Management Assoc. Annual Conference, 2009
- West Texas City Management Association Annual Training Conference, 2009
- Texas Municipal League Regional Meeting, 2009
- Texas Municipal Human Resources Association Annual Nuts and Bolts Conference, 2009
- East Texas City Management Association Annual Training Conference, 2008
- East Texas City Management Association Annual Training Conference, 2007
- International City/County Management Association Conference, 2006
- Certified Public Manager Program, 2006
- North Texas Municipal Clerks Association Management Institute, 2006
- City of Carrollton, Texas, Leadership Academy, 2006
- City of Arlington, Texas, Leadership Academy, 2005
- Urban Management Assistants of North Texas Annual One Day Conference, 2005
- Leadership Southwest, 2004, 2006, 2008
- International City/County Management Association Annual Conference, 2003
- Keynote Speaker (along with the Deputy Secretary of Defense), Government Electronics and Information Technology Association Information Technology and Defense Electronics Forecast Annual Conference – State and Local Homeland Security, 2002
- Transforming Local Government Conference, 2001
- National Association of Counties Annual Conference, 1999
- World Services Congress – Building Public Private Partnerships, 1999
- Central Texas City Management Association, 1999
- Carolinas-Virginia Hospital Trustee/Physician Conference, 1999
- Quorum Ohio CEO Conference, 1999
- Chairman of the Board In-Service Training, Quorum, 1999
- Quorum Foundations for the Future, 1999
- Quorum Chairman of the Board Training, 1998
- International City County Management Association, 1998
- Iowa Municipal Management Institute, 1997
- Quorum Foundations for the Future, 1997
- Quorum Board of Trustees Training, 1997

- Urban Management Assistants of North Texas, Conference of Minority Public Administrators, and National Forum for Black Public Administrators Joint Workshop – 1996
- Innovation Groups Regional Conference, 1996
- Texas City Management Association Annual Conference, 1996
- Florida City/County Management Assoc. Annual Conference, 1996
- North Carolina City/County Management Association Annual Conference, 1996
- Quorum Foundations for the Future, 1996
- International City/County Management Association Conference, 1996
- Texas City Management Association Conference, 1995
- Kansas Innovation Groups Regional Workshop, 1995
- City-County Communications & Marketing Association National Conference, 1994
- National League of Cities Innovations in Government National Conference, 1994
- Innovation Groups Regional Workshop, 1994
- Texas Foundation for the Improvement of Local Government Institute, 1994

#### **OTHER HONORS AND ACTIVITIES**

---

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

**Gary W. Holland**  
**2603 South Oxford Drive**  
**Stillwater, Oklahoma 74074**  
**405-269-3445**  
**Gholland73@hotmail.com**

## **SUMMARY OF QUALIFICATIONS**

- Management consulting services for Federal, state, and local government
- 17+ years executive level management experience in a rapid growth municipal government
- 10 years university-based experience in technology transfer and educational programming for local government
- 3 years collegiate public relations and small business education
- MBA – Oklahoma State University, 1985
- BBA – University of Oklahoma, 1974

## **EXPERIENCE**

### **Strategic Government Resources**

01/13 to Present    Senior Vice President

### **RESPONSIBILITIES**

- Perform executive search services for local governments

### **The Mercer Group, Inc.**

07/07 to 01/13    Senior Vice-President

### **RESPONSIBILITIES**

- Provide management consulting services to local governments
- Perform executive search services for local government (city/deputy city manager, department directors)
- Conduct management studies for units of local governments including compensation and classification studies, public safety analysis, organizational analysis, and more

### **City of Kissimmee, Florida    Population: 58,000**

05/01 – 11/06    Deputy City Manager (Retired in 2006)  
10/92 – 05/01    Assistant City Manager  
05/89 - 10/92    Assistant to the City Manager

## RESPONSIBILITIES AND ACCOMPLISHMENTS

- Served as a member of the budget development/review committee.
- Supervised department directors responsible for the Airport, Finance, Personnel, Information Technology, Parks and Recreation, Development Services, Central Services/Purchasing, and Community Redevelopment.
- Supervised the Assistant to the City Manager and the Public Information Officer.
- Supported the City Manager in supervising the Police Chief, Fire Chief, Public Works Director, and Water/Sewer Director.
- Represented the city on the Operating Committee of the local government and education television channel.
- Awarded grants totaling approximately \$1 million to develop transitional resident facilities for homeless women with children.
- Created and implemented an interdisciplinary plan to proactively address problems associated with the homeless population in the Kissimmee area.
- Charter member of the governing board of HOME (Helping Others Make the Effort).
- Awarded grants from the Florida Bureau of Historic Preservation for a survey of historic properties in Kissimmee and to develop nominations for listing of properties on the National Register of Historic Places.
- Represented the City Manager's office with the Kissimmee/Osceola Chamber of Commerce, the Community Redevelopment Agency, Osceola County, the Central Florida Regional Transit Authority, MetroPlan Orlando, and other external agencies.
- Created and implemented a long-range plan for information technology utilization throughout the city organization including local area networks, geographic information systems, and e-government solutions for citizens.
- Developed and implemented a plan for downtown redevelopment which did not require a tax increase.
- Served as executive construction project manager for a \$10 million charter elementary school sponsored by the City of Kissimmee.
- Lead contract negotiator for private management of the charter school.
- Facilitated a variety of improvements to the Kissimmee Gateway Airport designed to enhance the economic vitality of the area. Improvements include an air traffic control tower, instrument landing system, and improved ramp and road access to fixed base operators.
- Oversaw a number of capital improvement projects including a \$3 million civic center, \$5 million Central Services facility, and various parks and recreation facilities.
- Managed the creation and implementation of an emergency management plan for the City of Kissimmee in concert with City public safety departments and the Osceola County Emergency Management Department.

**Oklahoma State University**  
Stillwater, Oklahoma

6/79 to 5/89 Local Government Specialist – Technology Transfer, Community and Rural Development

### **RESPONSIBILITIES AND ACCOMPLISHMENTS**

- Participated in a 3-year project with Public Technology, Inc. as the technology transfer agent in a four-state area. PTI is an organization of the International City/County Managers Association responsible for innovative technology for local government. Interacted with members of the Federal Laboratory Consortium, industry trade associations, and various entrepreneurial groups in advancing innovative technology. Publications include:

Alternatives for Utility Meter Reading  
Asphalt Pavement Recycling Alternatives  
Compressed Natural Gas as a Fleet Vehicle Fuel

- Served as editor of the Federal Laboratory Consortium newsletter.
- Awarded a \$500,000 grant from the Kellogg Foundation to develop a national educational program on risk management in local government. Educational materials were developed for use by Cooperative Extension educators nationwide.
- Developed and presented educational programs for elected and appointed local government officials on their statutory and management duties and responsibilities.
- Presented educational programs throughout Oklahoma on trends in county government finance.
- Authored handbooks and other publications for use by Oklahoma local government officials in the execution of their duties including:

County Treasurers Handbook  
County Excise/Equalization Board Handbook  
District Court Clerk Handbook  
Municipal Bond Issues: Understanding the Basics  
A Guide to the County Financial Statement in Oklahoma

## **Selected Presentations**

- Compressed Natural Gas For Municipal Fleet Vehicles; National Conference of Mayors, Atlanta, Georgia
- Facilitating Technology Transfer Through the ORTA System; Federal Laboratory Consortium, Washington, D.C.
- Report on CNG Demonstration; American Gas Association, Washington, D.C.

## **Northern Oklahoma College** Tonkawa, Oklahoma

6/76 to 6/79 Director of Public Relations and Alumni Affairs

## **RESPONSIBILITIES AND ACCOMPLISHMENTS**

- Created and published information regarding the college and the various degree programs available.
- Developed radio and television promotions for the college.
- Implemented a student recruitment program throughout the state of Oklahoma resulting in an increase in enrollment three consecutive years.
- Authored an alumni newsletter and quarterly alumni newspaper.
- Responsible for coordinating the college development campaign.
- Classroom instructor for courses in Marketing and Small Business Management.

## **EDUCATION**

University of Oklahoma	Bachelor of Business Administration Marketing and Management
Oklahoma State University	Master of Business Administration Management and Finance National Dean's List – 3.95 GPA

# Project Methodology

## Overview

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

- 1. Organizational Inquiry and Analysis**
  - Outline Project Plan and Timeline
  - Individual Interviews with Search Committee, Key Personnel ,and Community Leaders (optional)
  - Development of Position Profile and Production of High Quality Brochure
  - Search Committee Briefing to Review/Approve Position Profile Brochure
- 2. Advertising and Recruitment**
  - Ad Placement
  - Recruitment Video (optional)
  - Email Distribution and Marketing of Position Profile
  - Ongoing Communication with Applicants and Prospects
- 3. Initial Screening and Review**
  - Management of Applications
  - Triage and Scoring of Resumes
  - Search Committee Briefing to Facilitate Selection of Semifinalists
- 4. Evaluation of Semifinalist Candidates**
  - Personal Interaction with Semifinalist Candidates
  - Written Questionnaire
  - Recorded Online Interviews
  - Media Search Stage 1
  - Search Committee Briefing to Select Finalists
- 5. Evaluation of Finalist Candidates**
  - Comprehensive Media Search and Report Stage 2
  - Comprehensive Background Screening Report
  - DiSC Management Assessment (optional)
  - Stakeholder Engagement (optional)
- 6. Interview Process**
  - Assessment Center Process
  - Conduct Interviews
  - Deliberations
  - Reference Checks
- 7. Negotiations and Hiring Process**
  - Determine the Terms of an Offer
  - Negotiate Terms and Conditions of Employment
  - Announcement/Press Release and Transition Strategy

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

---

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

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

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

### **Individual Interviews with Search Committee and Key Personnel**

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

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

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

### **Search Committee Briefing to Review/Approve Position Profile**

This communication with the Search Committee may be conducted in person, over the phone, or even via email, depending on the preference of the organization. This briefing is designed to report on themes or trends identified in the individual staff interviews and in particular to determine if there are any disconnects in perceptions or expectations regarding the roles and responsibilities of the position. SGR's goal is to zero in on the specific attributes you want and need, both tangible and intangible. SGR will evaluate the responsibilities, organizational and cultural demands, technical background, personality, and potential required. SGR will also develop a clear understanding of salary range, benefits, and other relevant employment expectations. Of particular importance is to identify any "litmus tests" that are absolute prerequisites to you before starting the recruitment.



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

---

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

### **Ad Placement/Marketing**

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

### **Recruitment Video**

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

### **Email Distribution and Marketing of Position Profile**

SGR's preferred strategy is to rely on email distribution of the position profile brochure to key opinion leaders and potential prospects across the country. The position will be announced in our "10 in 10" e-newsletter, which reaches over 60,000 local government professionals, in addition to a targeted email announcement to specific professional categories and/or areas of the country. By utilizing an email distribution strategy, these brochures tend to "get legs" of their own, resulting in a very high penetration rate at minimal cost.

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

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

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

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

---

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

#### **Management of Applications**

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

#### **Triage and Scoring of Resumes**

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

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

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

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

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

---

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

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

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

### **Written Questionnaire**

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

### **Recorded Online Interviews**

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

### **Media Search Stage 1**

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

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

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

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

---

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

### **Comprehensive Media Search and Report Stage 2**

These Stage 2 Media Reports are compiled by utilizing our proprietary media search process including variations of the candidates' names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Media Reports typically range from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts by residents, etc. The Media

Reports are put into an easy-to-read format and recorded onto flash drives for the Search Committee. The candidate's name is highlighted each time it appears.

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

### **Comprehensive Background Investigation Reports**

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

- Social Security number trace
- Address history
- Driving history/motor vehicle records
- Credit report
- Federal criminal search
- National criminal search
- Nationwide wants and warrants
- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)
- County criminal search (for every county in which candidate has lived or worked)
- County civil search (for every county in which the candidate has lived or worked)
- Education verification

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

### **Psychometric Assessment (optional)**

It is critical for you to know as much as you can about your new executive before hiring him/her. Historically, employers have depended upon resumes, references, and interviews as sources of information for making hiring decisions. In practice, these sources have often proved inadequate for consistently selecting successful employees. The use of assessments has become essential for employers who want to place the right people in the right positions. SGR uses a DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management Profile analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager.

### **Stakeholder Engagement (optional)**

At the discretion of the City Council, we will work closely with the city and council members to engage stakeholders in the recruitment process. Our recommendation is that we design a specific stakeholder engagement process after we learn more about the organization and the

community. Different approaches work best in different communities. Below is an array of options we have used in the past, but we will collaborate with the City Council to determine which option, or combination of options, will be the most effective for the unique needs of the organization.

- Interviewing community leaders at the outset of the search
- Holding a public forum for citizen engagement at the outset of the search
- Facilitating a Q & A series in the local newspaper with finalist candidates. This would run a week or two prior to the interviews.
- Utilize a citizen committee to conduct the early stage candidate screening and then turn over a semifinalist list to the City Council.
- “First Year Game Plan” process where finalist candidates are provided with elected official, key staff, and community leader contact information, and the candidates are given free rein to make contact with all of them in advance and use those insights to develop a “first year game plan” based on what they know so far. Feedback is received from the key contacts on their impressions of the finalist candidates from the interactions with the candidates prior to the interviews.
- Community leader reception
- Community wide reception
- Council and key community leader dinner meeting
- “Round Robin” forum meetings with various community groups during a multiday interview process.
- Site visits by citizen committee members to the finalist candidates’ communities to report back.

## **Step 6: Interview Process**

---

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

### **Assessment Center Process**

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

### **Conduct Interviews**

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

### **Deliberations**

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

### **Reference Checks**

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

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

---

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

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

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

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

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

### **Announcement/Press Release**

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

### **Transition Strategy**

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

## Proposed Timeline

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

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

## Project Cost

### All-Inclusive Maximum Price

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

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

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

Expense items include:

- Professional production of a high quality brochure. This brochure (typically four pages) is produced by SGR's graphic designer for a flat fee of \$300 per page.
- Ad placement in appropriate professional publications, including trade journals and websites, and related advertising to announce the position. This is billed at actual cost, with no markup for overhead.
- Printing of documents and materials. Reproduction costs for reports and briefing books presented to the client at 23 cents per copy, plus the cost of binders/binding. Electronic discs are billed at \$5 each. Flash drives are billed at \$10 each.
- Online interviews. There is an additional cost of \$200 for each recorded online interview. SGR recommends conducting online interviews at the semifinalist stage (up to 12 semifinalists).
- Psychometric Assessments. There is an additional cost of \$150 per candidate for the DISC Management Profile (up to 6 finalists).
- Comprehensive Media Reports – Stage 2. There is an additional cost of \$350 per candidate. SGR recommends conducting Stage 2 media searches on the finalist candidates (up to 6 finalists).
- Comprehensive Background Investigation Reports. There is a cost of \$300 per candidate for comprehensive background screening reports prepared by our licensed private investigations provider. SGR recommends conducting comprehensive background investigations on the finalist candidates (up to 6 finalists).
- Travel and related costs for the Project Manager incurred for the benefit of the client. Meals are billed back at \$10 for breakfast, \$15 for lunch, and \$20 for dinner. Hotels are billed at a \$150 per night per diem. 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.



### **\*Optional Services**

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

- Candidate Travel. Candidates are typically reimbursed directly by the client for travel expenses. If the client prefers a different arrangement for candidate travel, SGR will be glad to accommodate the client's wishes.
- Stakeholder Engagement. Should the City Council elect to include stakeholders in the recruitment process, all direct expenses such as meeting location, refreshments, etc. would be handled and paid for by the City. SGR's professional services rendered for a stakeholder engagement process are included in the not-to-exceed cost above.
- Recruitment video. SGR offers the option of a customized recruitment video for a cost of \$3,000.
- Site Visits to Communities of Finalist Candidates. If desired, the Project Manager will travel to the communities of the finalist candidates to conduct onsite visits. Site visits will be charged at a day rate of \$1,000 per day, plus travel expenses.
- In the unexpected event the client shall request that unusual out of pocket expenses be incurred, said expenses will be reimbursed at the actual cost with no mark up for overhead.
- If the client desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval. Supplemental services will be billed out at \$250 per hour.

### **Billing**

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

## Provision of Service Guarantee

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

---

## References

---

Client: City of Rockwall, Texas (pop. 38,000)  
Contact: Honorable David Sweet, Mayor  
Phone: 972-771-7700  
Email: [davidsweet@rockwall.com](mailto:davidsweet@rockwall.com)  
Date of Service: 2012  
Position: City Manager

Client: City of Piney Point Village, Texas (pop. 3,000)  
Contact: Honorable Ron Goodwine, City Council Member  
Phone: 713-782-0271  
Email: [ron@ppvcouncil.org](mailto:ron@ppvcouncil.org)  
Date of Service: 2012  
Position: City Administrator

Client: City of Bainbridge Island, Washington (pop. 23,000)  
Contact: Honorable Anne Blair, City Council Member  
Phone: 206-214-7907  
Email: [ablair@bainbridgewa.gov](mailto:ablair@bainbridgewa.gov)  
Date of Service: 2012  
Position: City Manager

### **Additional Executive Search References:**

Brian Brooks, City Manager, City of Forney, Texas (pop. 14,000)  
[bbrooks@cityofforney.org](mailto:bbrooks@cityofforney.org)  
972-564-7300

Matt Mueller, Town Manager, Town of Little Elm, Texas (pop. 26,000)  
[mmueller@littleelm.org](mailto:mmueller@littleelm.org)  
214-975-0405

Troy Powell, City Manager, City of The Colony, Texas (pop. 36,000)  
[cm@thecolonytx.gov](mailto:cm@thecolonytx.gov)  
972-625-1756

Jennifer Fadden, City Manager, City of Colleyville, Texas (pop. 23,000)  
[jfadden@colleyville.com](mailto:jfadden@colleyville.com)  
817-503-1116

## City Manager and Deputy/Assistant City Manager Searches

2013

---

### City/Town Manager

- Bellaire, Texas (pop. 17,000)
- Burien, Washington (pop. 32,000) – in process
- Fate, Texas (pop. 800) – in process
- Henderson, Texas (pop. 11,000) – in process
- League City, Texas (pop. 71,000) – in process
- Owasso, Oklahoma (pop. 31, 000)
- Pearland, Texas (pop. 96,000) – in process
- San Marcos, Texas (pop. 50,000)
- South Padre Island, Texas (pop. 3,000) – in process
- Burkburnett, Texas (pop. 11,000)
- College Station, Texas (pop. 94,000)
- Ferris, Texas (pop. 2,500)
- Sikeston, Missouri (pop. 16,000)
- Wills Point, Texas (pop. 3,500)
- Delray Beach, Florida (pop. 60,000) \*\*

### Deputy/Assistant City Manager

- Amarillo, Texas, ACM for Development Services (pop. 191,000)
- Cape Girardeau, Missouri, ACM-Development Services (pop. 38,000) \*
- Cape Girardeau, Missouri, ACM-Administrative Services (pop. 38,000) \*
- McKinney, Texas, DCM (pop. 132,000) \*

2012

---

### City/Town Manager

- San Angelo, Texas (pop. 93,000)
- Flower Mound, Texas (pop. 65,000)
- Duncanville, Texas (pop. 38,000)
- Huntsville, Texas (pop. 38,000)
- Rockwall, Texas (pop. 38,000)
- Texarkana, Texas (pop. 36,000)
- Hot Springs, Arkansas (pop. 35,000)
- La Porte, Texas (pop. 34,000)
- Little Elm, Texas (pop. 26,000)
- Paris, Texas (pop. 25,000)
- Bainbridge Island, Washington (pop. 23,000)
- Miami, Oklahoma (pop. 13,500)
- Burkburnett, Texas (pop. 11,000)
- Elk City, Oklahoma (pop. 11,000)
- Fate, Texas (pop. 6,400)
- Jacksboro, Texas (pop. 4,500)
- Willow Park, Texas (pop. 4,000)
- Canton, Texas (pop. 3,500)
- Argyle, Texas (pop. 3,300)
- Van Alstyne, Texas (pop. 3,000)

- Guthrie, Oklahoma (pop. 10,000) \*
- Piney Point Village, Texas (pop. 3,100) \*

**Deputy/Assistant City Manager**

- Corpus Christi, Texas, ACM (pop. 305,000)
- Victoria, Texas, ACM (pop. 62,000) \*
- Brentwood, Tennessee, ACM (pop. 37,000) \*\*

2011

---

**City/Town Manager**

- Kilgore, Texas (pop. 13,000)
- Cleveland, Texas (pop. 7,500)
- Gonzales, Texas (pop. 7,000)
- Yoakum, Texas (pop. 5,800)
- Breckenridge, Texas (pop. 5,700)
- Van Alstyne, Texas (pop. 3,000)
- College Station, Texas (pop. 94,000) \*\*

**Deputy/Assistant City Manager**

- Cedar Park, Texas, ACM (pop. 49,000)

2010

---

**City/Town Manager**

- Amarillo, Texas (pop. 191,000)
- Denison, Texas (pop. 23,000)
- Burkburnett, Texas (pop. 11,000)

**Deputy/Assistant City Manager**

- Midland, Texas, ACM (pop. 111,000) \*

\* *Limited Service Search* - Limited service searches include marketing, sourcing of candidates, management of applicant submittals, triage level review of applicants, and any additional services requested.

\*\* *Component Based Search Services* - Some examples of component based search services include marketing, psychometric assessments, background investigation reports, media search reports, reference checks, and resume evaluations.

*Population numbers are approximate. Resource: www.City-Data.com*

## Client List for Executive Search Services

Abilene, Texas	Freeport, Texas	Midlothian, Texas EDC
Addison, Texas	Gainesville, Texas	Mount Pleasant, Texas
Alice, Texas	Gonzales, Texas	Mustang, Oklahoma
Amarillo, Texas	Grand Prairie, Texas	Orange County, North Carolina
Argyle, Texas	Grapevine, Texas	Owasso, Oklahoma
Arlington, Texas	Greenville, Texas	Palestine, Texas
Atlanta, Texas	Guthrie, Oklahoma	Paris, Texas
Bainbridge Island, Washington	Hancock County Port & Harbor Commission, Mississippi	Pearland, Texas
Bellaire, Texas	Harris County ESD No. 48, Texas	Piney Point Village, Texas
Big Spring, Texas	Hewitt, Texas	Plano, Texas
Breckenridge, Texas	Highland Park, Texas	Prosper, Texas
Brentwood, Tennessee	HJV Associates	Red Oak, Texas
Burkburnett, Texas	Hot Springs, Arkansas	Richland, Washington
Burnet, Texas	Hudson Oaks, Texas	Richland Hills, Texas
Canton, Texas	Huntsville, Texas	Riverbend Water District, Texas
Cape Girardeau, Missouri	Hutto EDC, Texas	Rockwall, Texas
Cedar Hill, Texas	Irving, Texas	Rowlett, Texas
Cedar Park, Texas	Jacksboro, Texas	Royse City, Texas
Cleveland, Texas	Keller, Texas	San Angelo, Texas
College Station, Texas	Kilgore, Texas	San Marcos/Hays County EMS
Colleyville, Texas	Kyle, Texas	Seabrook, Texas
Colorado River Municipal Water District	La Porte, Texas	Seagoville, Texas
Commerce, Texas	Lakeway, Texas	Shoreline, Washington
Copper Canyon, Texas	Lancaster, Texas	Socorro, Texas
Corpus Christi, Texas	Las Vegas, Nevada	Southlake, Texas
Dalhart, Texas	Lawton, Oklahoma	St. Charles, Missouri
Delray Beach, Florida	League City, Texas	Sunny Isles Beach, Florida
Denison, Texas	Lenexa, Kansas	Terrell, Texas
Denton, Texas	Little Elm, Texas	Texarkana, Texas
Duncanville, Texas	Longview, Texas	Tomball, Texas
El Paso, Texas	Lorena, Texas	Van Alstyne, Texas
El Paso MPO, Texas	Los Lunas, New Mexico	Victoria, Texas
Elk City, Oklahoma	Lufkin, Texas	Waxahachie, Texas
Farmers Branch, Texas	Manhattan, Kansas	Weatherford, Texas
Farmersville, Texas	McKinney, Texas	Westlake, Texas
Fate, Texas	McKinney EDC, Texas	Willow Park, Texas
Ferris, Texas	Memorial Villages PD, Texas	Wills Point, Texas
Flower Mound, Texas	Miami, Oklahoma	WMI
Forney, Texas	Midland, Texas	Yoakum, Texas

## Positions

### Administration

City Manager  
Deputy City Manager  
Assistant City Manager  
Assistant County Manager  
City Secretary

### Administrative Services/Internal Services

Administrative Services Director  
Finance Director  
Finance Manager  
Fleet Equipment Services Manager  
Assistant Municipal Garage Superintendent  
Human Resources Director  
IT Director  
IT Manager  
IT Developer

### Animal Services

Animal Services Manager

### Development Services

Community Development Director  
Development Services Director  
Building Official  
New Urbanist

### Economic Development, CVB

CVB Executive Director  
Downtown Development Director  
Economic Development Director  
Economic Development Executive Director  
Executive Director of Port & Harbor Commission

### Legal

City Attorney  
First Assistant City Attorney

### Library

Library Director

### Marketing and Community Engagement

Community Relations Manager  
Community Services Director  
Public Information Officer

### Metropolitan Planning Organization

Director of Metropolitan Planning Organization

### Museum

Museum Director

### Parks and Recreation

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

### Public Safety, EMS, Emergency Management

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

### Public Works, Utilities, Engineering

City Engineer  
Public Works Director  
Public Works Assistant Director  
Water District Executive Director  
Planning & Engineering Director  
Assistant Utilities Director  
Engineering Services Manager for Water District  
Assistant General Manager for Water District

### Private Sector

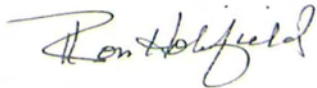
Business Development Manager  
Municipal Service Representative  
Public Sector Marketing Manager

### SGR Equal Employment Opportunity Statement

It is the policy of SGR to afford equal employment opportunity to all individuals, regardless of race, creed, color, religion, gender, national origin, ancestry, age, marital status, veteran status, disability, medical condition, gender identity or sexual orientation.

Our employees, as well as applicants and others with whom we do business, will not be subjected to sexual, racial, religious, ethnic, or any other form of unlawful harassment and/or discrimination. In addition, SGR adheres to the equal employment opportunity requirements of all States and localities in which it does business.

We are completely committed to these principles.



11-30-2012

---

Ron Holifield, CEO  
Strategic Government Resources

Date



## Recruitment of Minority and Female Government Executives

SGR believes that the development and recruitment of diverse candidate pools in every one of our searches is not only a moral imperative, but we believe that it is absolutely essential if we are to effectively serve our clients. We live in an increasingly diverse world, and organizations are in critical need of diverse leadership, as well as leaders who understand and authentically value diversity as a strength to be built upon, not merely a standard to be complied with. SGR's CEO previously served as City Manager in a majority minority community, and he has a strong reputation among female and minority public administrators as a recruiter who is authentically committed to open and inclusive search processes.

SGR never relies on a "stable" of regular candidates like other firms (which tends to create a closed loop bias against diverse candidate pools). Instead, every search we do is broadcast to every prospective candidate in our database – which is the largest privately held database of local officials in the nation. This ensures that any interested prospect will have the chance to become a candidate.

Regardless of specific strategies, the real question is whether the strategies are actually producing diverse candidate pools. The simple fact is that a recruitment firm can buy numerous ads saying they are equal opportunity or they can underwrite numerous minority or female association events - but if minority and female candidates do not believe the recruiter's commitment is authentic, then the outreach efforts will undoubtedly fail.

SGR has a reputation for genuinely believing in the benefit of seeking out diverse candidate pools.

## Unsolicited Feedback Regarding SGR's Performance

### Quotes from Emails

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

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

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

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

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

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

September 2013: "Thank you, [Project Manager]. Without you, we would have had a far different result."

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

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

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

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

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

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

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

April 2013: "...I would also like to say that I am very impressed with SGR. You have been prompt and professional and have kept me informed during the process. I will utilize your website and the information it provides."

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

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

February 2013: "Just a short note to tell you how happy we are here in [community] with [city manager]. It has been a joy and fun to work with him. It was such a change to have someone who actually wants your input, easy to get used to. Thanks again for your help."

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

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

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

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

October 2012: "I have been working with [SGR staff] on the [client] posting. They are a class act and have been nothing but a pleasure to work with thus far."

October 2012: "Just wanted to thank you for providing the information about the [client] to us. It is the first time I have received additional information during a process as this and felt compelled to let you know how much it is appreciated."

September 2012: "Thanks so much for your kind and generous email. I also appreciate your phone call this afternoon. There are very few folks these days that take the time to actually make a personal contact and I thank you for that."

September 2012: "Thank you, Thank you, Thank you...This was a great experience and I really enjoyed working with you."

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

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

July 2012: "I have received this type of message dozens of times, and this was the best in its courtesy and sensitivity. Thank you for your response. I will be sure to consider your company for any future executive search needs."

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

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

June 2012: "I will have to say you all are the first firm that I have ever had that keeps candidates updated! That is excellent business in my book! Thank you for being so good!"

# CITY OF BAINBRIDGE ISLAND, WASHINGTON



## CITY MANAGER POSITION PROFILE

### the community

Bainbridge Island, located 35 minutes from downtown Seattle via ferry, has a population of just over 23,000. This vibrant, diverse community, with 53 miles of shoreline, is rich in history, culture and natural beauty. With its semi-rural environment, the Island is home to an eclectic mix of farms, wineries, hiking trails, museums, and local arts.

With views of the snow-capped Olympic Mountains to the west and Mount Rainier to the east, Bainbridge Island is the closest getaway destination by ferry from Seattle. Residents and visitors enjoy the best of scenic, small-town charm. Islanders have gone to great lengths to reach a delicate balance: preserving nature, while living within it. Bainbridge Island successfully blends its Pacific Northwest heritage with a casual, artistic, forward-thinking sensibility.

Working farms and grassy meadows still dot this friendly island. With several natural harbors, the Island has a strong boating community, and boasts several marinas, yacht clubs, and moorage facilities. Waterfront parks,

### resources

#### *city website*

[www.ci.bainbridge-isl.wa.us](http://www.ci.bainbridge-isl.wa.us)

#### *chamber of commerce*

[www.bainbridgechamber.com](http://www.bainbridgechamber.com)

#### *economic development alliance*

[www.kitsapeda.org](http://www.kitsapeda.org)

#### *visitor information*

[www.bainbridgeisland.com](http://www.bainbridgeisland.com)

woodland trails and miles of shoreline with natural harbors provide water-related, as well as land-based, recreation for all generations. Popular outdoor sports include kayaking, canoeing, and sailing. Bainbridge is home to the 150-acre internationally renowned Bloedel Reserve, a bountiful and popular farmers' market, numerous parks and two golf courses, as well as the Bainbridge Historical Museum, the Kids Discovery Museum and the future home of the Bainbridge Island Museum of Art.

Residents hold protection and conservation of the Island's natural systems as a primary community value. They voted to tax themselves to purchase hundreds of acres of forests, meadows, beaches, trails, and public farmland to insure the sustainability of environmental protections, community recreational access, and opportunity for local food sources. A 2008 survey of community values reported that 90% of respondents wanted taxes and City services to remain the same or were willing to support a tax increase to support increased services. 93.5% of respondents rated quality of life as good or excellent.

Incorporated in 1947 as the City of Winslow, the City of Bainbridge Island was established in 1991 as a strategy for dealing with island-wide growth issues. At that time, Winslow, which was two square miles with a population of 6,000, annexed the remaining 26 square miles of the Island's unincorporated area. Immediately following incorporation, the city experienced a significant increase in population. This growth has been in single digits and stable during the last five years. Currently, Bainbridge Island ranks 42 out of Washington's 281 cities in terms of population.

Once home to the world's largest sawmill, Bainbridge Island has grown primarily as a residential community with an active central business district and three small business parks. Employment on the Island comes from a mixture of small retail shops, numerous home-based businesses, manufacturing, government, and healthcare. Many Island residents commute for employment, primarily to Seattle using the Washington State Ferry System.

Highly rated Bainbridge Island School District (BISD), with an enrollment of approximately 3,800 students, is the community's largest employer with a staff of 500. BISD's mission is to prepare students for the global workplace, college and personal success.

District students demonstrate some of the highest academic achievement in the state. In 2012, US News & World Report ranked Bainbridge High School and Eagle Harbor High School in the list of "America's Best High Schools." Of the 22,000 public high schools ranked, BHS received a Gold Medal as #212 in the nation, and EHHS was designated with a Silver Medal as #1,583. BHS also was designated as one of the US News Best High Schools in Math and Science, ranking #68 in the nation. In addition, a number of Island students attend parochial and private schools on the Island.

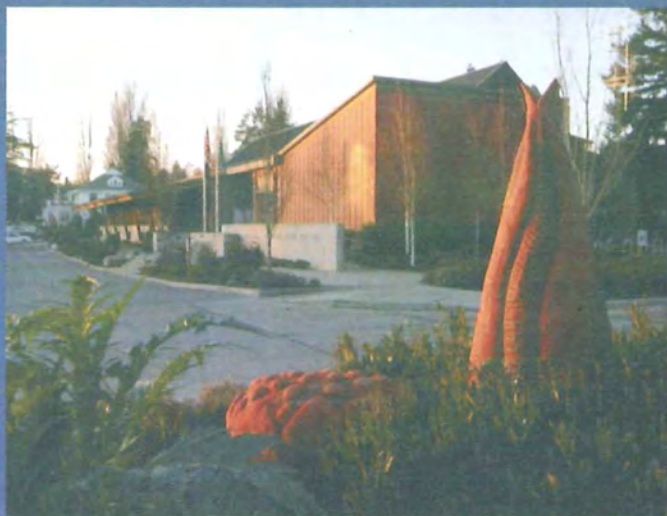
With over 75% owner-occupied housing units, the average home value in Bainbridge Island is \$597,500 with a median family income of \$113,686.

## city organization

The City of Bainbridge Island is a non-charter code city with a Council-Manager form of government. The City Council is made up of seven members, including two representatives from each of three wards (north, central, south), and one "at-large" member representing the Island as a whole. Council members each serve a staggered four-year term. The members of the City Council choose a chair on a biennial basis. The Chair has the title of Mayor and presides at Council meetings. A Mayor Pro Tem is also selected and presides over City Council Study Sessions.

The City Council appoints a professional City Manager, who reports to the City Council and is responsible for the day-to-day operations of the organization. Those directly reporting to the City Manager include the City Attorney, Deputy City Manager, Finance and Administrative Services Director, Information Technology Manager, Planning and Community Development Director, Police Chief, and Public Works Director. The City of Bainbridge Island has 108 fulltime equivalent employees.

## CITY MANAGER POSITION PROFILE





## CITY MANAGER POSITION PROFILE

The City of Bainbridge Island adopts a biennial budget. The 2012 Adopted Budget includes \$21 million in operating expenditures, \$10.5 million in non-operating expenditures, and total revenues of \$32.3 million.

Bainbridge Island has several separate government entities (i.e. Special Purpose Districts, also referred to as junior taxing districts), including a Fire District, Metro Parks and Recreation District and School District. Other taxing districts provide services to specific areas/neighborhoods around the Island, and a local branch of the County-wide library system serves Bainbridge Island.

### issues & challenges

Having rebalanced the City budget and established reserve accounts over the past 18 months, sustainable and smart growth, sound fiscal management and economic development are high priorities for the City Council. Bainbridge Island has an aging infrastructure. Capital improvements have been largely grant funded and with limited resources allocated for repairs, there has been very little maintenance of the Island's 142 miles of roadway for many years. Having no major industry, the majority of revenues come from property taxes, real estate excise taxes and city development and building fees.

The City of Bainbridge Island has limited water and sewer service. The majority of the Island is served by private wells or water systems and septic systems. The City Council intends to reassess the City's operation of its small water system later this year.

It will be important for the next City Manager to communicate well and utilize team building skills to improve customer service, facilitate community participation, and strengthen public trust.

The next City Manager will be responsible for working with the City Council to develop and implement an assessment of the organization and its processes to assure provision of the best municipal services at the lowest cost.

### ideal candidate

The new City Manager should be a seasoned and professional leader who can demonstrate exceptional leadership ability, a collaborative spirit, and excellent communication and interpersonal skills. An empowering management style with a strong commitment to organizational development and team building is critical. A commitment to open and transparent government and the willingness to be an integral part of the community are highly desired attributes.

Dedication to improving the credibility of the municipal government organization and the Police Department will be important in strengthening the public's trust. The successful candidate will have experience in community policing and unionization issues.

The new City Manager will need to work with the City Council to develop a broad community vision and strategic plan that preserves the Island's characteristics, charm, and its artistic and diverse culture. A person who recognizes what is special about Bainbridge Island and will work to protect its unique nature using economic sustainability is vital. The ideal candidate will be personally involved in the community and have a sense of humor, as well as the ability to engage residents, resulting in a more involved citizenry.

The successful candidate will be results oriented, have a keen understanding of economic development principles and a proven track record of business retention and development. The candidate will need to cultivate a positive working relationship with other jurisdictions and organizations, clearly define zoning to protect Island resources, and encourage smart growth.

A strong background in municipal finance and performance based budgeting is essential. The new City Manager will be dedicated to financial transparency and have the ability to improve cost efficiency through creative service delivery. Challenged with an aging infrastructure and limited resources, the new City Manager will need to quickly grasp the big picture and present the City Council with options for solutions to balance resources and expenses.

The new City Manager will promote organizational development through process improvement. The successful candidate will be capable of guiding and coaching employees in a calm and professional manner to encourage a team approach to delivering a high level of customer service. Setting clear expectations and accountability standards will be important as the new City Manager reviews the organizational structure and considers redistribution of resources to more efficiently manage operations.

## education & experience

The successful candidate should have a Bachelor's Degree in Public Administration, Business Administration or a related field with a minimum of ten (10) years of progressively responsible experience as a professional City Manager. An advanced degree in a relevant field, as well as ICMA training and membership are preferred.

The successful candidate should have strong leadership skills, experience with economic development, a solid financial background, and familiarity with unionization and labor laws, as well as complex land-use issues. The candidate should have a demonstrated record of process improvement and the ability to evaluate a variety of municipal issues and opportunities and offer sound policy and procedural recommendations.

## compensation & benefits

The City of Bainbridge Island offers a competitive salary, depending on experience and qualifications, and a choice between two State of Washington retirement plans. A full range of leave and insurance benefits is also provided.

## application process

To apply for this position, please email cover letter and resume to:

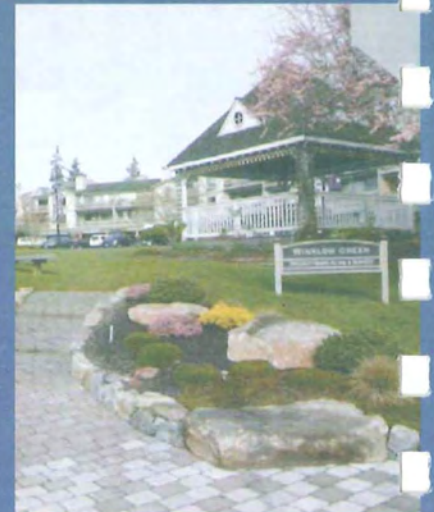
Tom Muehlenbeck, Senior Vice President  
Strategic Government Resources  
[Tom@GovernmentResource.com](mailto:Tom@GovernmentResource.com)  
972-740-4468

Applications are preferred electronically. Please insert "Bainbridge Island City Manager" in the subject line. Kindly use PDF format if possible. Should you have any questions regarding the opportunity, or a recommendation of a colleague, please contact SGR Executive Search.

This position is open until filled. Please visit [www.GovernmentResource.com](http://www.GovernmentResource.com) for the review status of this position. The City of Bainbridge Island is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check.



# CITY MANAGER POSITION PROFILE





# CITY MANAGER POSITION PROFILE

## *for the City of Sikeston, Missouri*

### *The Community*

Sikeston, Missouri, with a population of over 16,000, is located in both southern Scott and northern New Madrid counties. Sikeston covers over 17 square miles and is conveniently located on Interstate 55 and Interstate 57/US Highway 60. It is the halfway point between St. Louis and Memphis, and is four hours from Nashville.

Originally known as "Big Prairie," Sikeston was named for John Sikes, who founded the community in 1860. Until 1872, Sikeston was the terminus for the Cairo and Fulton, later the Missouri-Pacific, railroad. At the time, the train was the only means of transportation across the region's vast swampland. In the early 1900s, a series of dams constructed during the Little River Drainage District Project, along with timber barons and loggers, converted the area into fertile farmland. The town experienced growth and prosperity as farmers moved to the area. The Sikeston region became so important to early 20th century agriculture that during World War I, the Sikeston Depot shipped more corn and flour than any other depot in the United States.

Today, Sikeston is a community with southern hospitality and historic charm. Residents enjoy life to the fullest, with excellent opportunities for recreation, family activities, historical and cultural events.

The Sikeston Depot Museum is the region's newest historic museum and cultural arts center featuring exhibits that recount important aspects of the area's history, an art gallery, and a cultural center displaying national traveling exhibits. Sikeston is also home to the Southeast Missouri Agricultural Museum, boasting the largest collection of antique farm machinery in Missouri.

Sikeston Little Theatre has been providing entertainment in Southeast Missouri for over 50 years. The 250-seat venue offers five shows each season including children's productions, plays, and musicals. Every August, the Sikeston Jaycee Bootheel Rodeo, one of the top five PRCA sanctioned rodeos in the country, attracts visitors from across the region. This annual event, held over four days, hosts nationally ranked cowboys and country music stars.



City of Sikeston  
Website

[www.sikeston.org](http://www.sikeston.org)

## *The Community, continued*

Sikeston Public Schools is AAA rated and provides comprehensive and quality education to over 3,800 students on nine campuses. Additionally, three private schools are also available offering education opportunities to approximately 200 students.

For those seeking higher education, Sikeston is home to three institutions with a variety of opportunities available. Southeast Missouri State University-Sikeston Campus, with an enrollment of 2,000 students, offers a number of four-year degree programs. Three Rivers Community College-Sikeston Campus, with a new 55-acre campus under development, offers associate degree programs in several disciplines. Additionally, Sikeston Career and Technology Center provides customized vocational and technical training.

## *Governance & Organization*

Sikeston is a home rule city operating under the Council-Manager form of government. The City Council consists of the Mayor and six Council Members. The Mayor and two Council Members are elected at-large, with four council members each representing separate wards.

The City Council appoints a professional City Manager who manages the day-to-day operations of the organization. The City has over 150 full-time equivalent employees including a Public Safety Department with trained personnel serving as both police and fire protection officers. Positions reporting directly to the City Manager include the directors of Administrative Services, Governmental Services, Public Safety, Public Works, and Economic Development.

The City-owned Sikeston Board of Municipal Utilities (BMU) is an autonomous entity which provides the community's electric, water and sewer services. Utility rates are the lowest in the State. The City also operates a municipal airport, which includes a 5,500-foot runway and fixed based operation accommodating 10,000 operations annually and is home to several corporate aircraft.

Sikeston's current annual budget is over \$12 million (not including the BMU), and the property tax rate is \$0.7494 per \$100 of valuation. The median household income is \$31,788, and the average home value is \$101,373.

## *Leadership & Innovation*

Updating the strategic plan will be a top priority for the new City Manager. It will be important to identify measurable objectives that meet the goals of the plan and to guide and hold City Staff accountable for pursuing and reaching those goals. Additionally, a comprehensive plan needs to be updated and officially adopted, and a number of citizen advisory boards should be evaluated for consolidation or retirement.

While the City Staff works well together, a need exists to restructure the organization to establish clear chains of command. Implementation of a more effective performance appraisal system that will ensure accountability and follow-through is necessary. The current City Manager has served the organization for 28 years and directed the public works and planning departments. The new City Manager will need to recruit and hire someone to oversee those responsibilities.

Sikeston has successfully attracted new industry with accompanying jobs. However, many new employees are not relocating to Sikeston due to a housing shortage. A relatively high proportion of the existing housing stock is rental, and a need exists for affordable homes in the community. Adding to the challenge, FEMA flood plain maps have recently been revised to include developed residential areas, requiring homeowners to obtain costly flood insurance. Making positive progress in addressing the existing housing situation will be an important issue for the new City Manager.

A large number of derelict and abandoned properties have been acquired by the City, and the new City Manager will need to develop a strategy to help return the properties to private ownership for development.

The City can benefit by fostering effective working relationships with other local and regional government agencies. It will be essential for the new City Manager to develop those partnerships to enhance efficiencies through cooperative agreements.



## Ideal Candidate

The new City Manager will be an assertive and energetic leader who is personable and approachable with broad experience as a management generalist. The ideal candidate will be a proven change agent capable of implementing improvements in an efficient manner without creating a stressful environment.

The successful candidate will be a polished communicator who is politically savvy while remaining politically neutral. It will be important for the new City Manager to be highly visible and be an active participant in community life and events. Having previously lived and worked in a rural community is helpful.

Continued growth is a priority for Sikeston. The City Council seeks a City Manager experienced in economic development and strategic planning. The new City Manager should have strong budget and financial management skills, personnel management experience, and the ability to delegate effectively.

## Education & Experience

The successful candidate will have five or more years of local government experience as a city manager or as an assistant city manager in a comparable or larger community. A bachelor's degree in business, finance, or a related field is required. A master's degree in business or public administration is preferred, and economic development certification is highly desired.

## Compensation & Benefits

The City of Sikeston offers a competitive starting salary of up to \$110,000, depending on qualifications and experience. The City participates in the Local Government Employee Retirement System (LAGERS) LT8-65 with the City paying 100% of the retirement contributions. In addition to a full range of leave and benefits, either a car allowance or use of a City-owned vehicle is provided. Residency within the city limits of Sikeston is required, and a reasonable relocation expense reimbursement is offered.

## Application Process

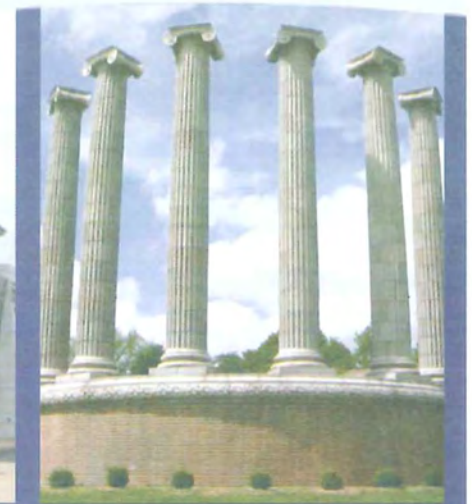
Please apply online at: [apply.governmentresource.com](http://apply.governmentresource.com)

For more information on this position contact:

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

The position is open until filled. For the review status of this position, please visit:  
[www.GovernmentResource.com/pages/CurrentSearches](http://www.GovernmentResource.com/pages/CurrentSearches).

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





## Background Screening Report

First Check  
 1500 Corporate Circle Ste 13  
 Southlake, TX 76092  
 Phone: 817-410-8383 / 888-588-2525  
 Fax: 888-213-9341

FILE NUMBER	1023	REPORT DATE	02-27-2009 LM
REPORT TO	STRATEGIC GOVERNMENT RESOURCES (20002) 1117 Bourland Rd Keller, TX 76248 Phone: 817-337-8581 Fax: -	ORDER DATE	02-26-2009
		REFERENCE	CITY OF BEDROCK
		TYPE	EXECUTIVE SEARCH - BACKGROUND CHECK

### Application Information

APPLICANT	FLINTSTONE, FREDERICK	SSN	123-44-5678	DOB	09-29-XXXX
ADDRESS(ES)	480 SLATE RD	CITY / STATE / ZIP	BEDROCK , TX 75189		

### Identity Development

#### Person Search - SSN TRACE/ ADDRESS VERIF

RESULTS	Records Found	SEARCH DATE	02-26-2009 8:46 AM	
SSN SEARCHED	123-44-5678			
<b>Applicant Information</b>				
FULL NAME / SSN	DOB	ADDRESS	PHONE	REPORTED DATE(S)
FRED FLINTSTONE 123-44-5678	XXXX-00 Age: 49	480 HOWELL RD BEDROCK TX 75189 County: ROCK	(888)636-2459	First: 1993-04 Last: 2009-02
FREDERICK FLINTSTONE 123-44-5678		480 HOWELL RD BEDROCK, TX 75189 County: ROCK	(888)636-2459	First: 1993-04 Last: 2007
FRED FLINTSTONE 123-44-5678	XXXX-00 Age: 49	1006 COLUMBINE DR SUGAR, TX 75043 County: TILE		First: 1996-08 Last: 2004-06
FRED FLINTSTONE 123-44-5678		306 W VISTA DR SUGAR, TX 75041 County: TILE		First: 2002-04 Last: 2002-06
FRED R FLINTSTONE 123-44-5678	XXXX-09-29 Age: 49	1824 DEVON SUGAR, TX 75041 County: TILE		First: 1990-12 Last: 1990-12
FRED FLINTSTONE 123-44-5678	XXXX-00 Age: 49	1518 COLONEL DR CREEK, AR 71839 County: MILLER		
FREDDY FLINTSTONE 123-44-5678	XXXX-00 Age: 49	1824 DEVONSHIRE DR GARLAND CITY, AR 71839 County: MILLER		
FRED R FLINTSTONE 123-44-5678		1518 COLONEL DR CREEK, TX 75043 County: DALLAS		

#### SSN Information

SSN	VALID	ISSUED LOCATION	ISSUED DATE RANGE
123-44-5678		SSN is valid.Issued in Texas	1974

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

### Credit

#### Credit Summary

TOTAL TRADELINES	40	30 DAYS LATE	0
CURRENTLY SATISFACTORY	40	60 DAYS LATE	0
CURRENTLY DELINQUENT	0	90 DAYS LATE	0
PREVIOUSLY DELINQUENT	0	NEWEST TRADE	09/01/08
COLLECTION/CHR OFFS	0/0	OLDEST TRADE	12/01/79
PUBLIC RECORDS	0	INQUIRIES	0

#### Financial Summary

#	PAYMENT	TTL BALANCE	PAST DUE	UTILIZATION
MORTGAGE	2			

		\$1458	\$80157	\$0
INSTALLMENT	15	\$575	\$47296	\$0
OPEN	0	\$0	\$0	\$0
REVOLVING	23	\$75	\$1689	\$0
OTHER	0	\$0	\$0	\$0

40 \$2108 \$129142 \$0

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

**Variations**

**Personal Information Comparison**

	NAME	SOC SEC	DOB	AKA
APPLICANT	FLINTSTONE, FRED	123-44-5678	09/29/1959	
XP	FLINTSTONE, FREDERICK	MATCH	09/29/59	FRED FLINTSTONE
		MATCH		

**Address Comparison**

	ADDRESS	REPORTED
APPLICANT	480 HOWELL ROAD , BEDROCK, TX 75189	02/27/09
XP	480 HOWELL RD , BEDROCK, TX 75189	10-2008
APPLICANT	XP ROYSE CITY TX , BEDROCK, TX 75189	01-2001
APPLICANT	XP 1006 COLUMBINE DR , SUGAR TX 75043	10-1999

**Employment Comparison**

	COMPANY	POSITION	REPORTED
APPLICANT	XP BEDROCK POLICE		09-1994
APPLICANT	XP SLATE GRAVEL CO		08-1995

**Credit Bureau Report**

**Credit History**

CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE			TYPE TERMS	PRESENT STATUS	E C O A
						30	60	90+			
COUNTRYWIDE HOME LOANS	08/01/02 75	01/01/09 01-2009	\$125000	\$80157	\$0	0	0	0	MTG 180 \$1458	AS AGREED	J
<b>Remarks:</b> CONVENTIONAL REAL ESTATE LOAN, INCLUDING PURCHASE MONEY FIRST											
NISSAN MOTOR ACCEPTANC	02/01/07 24	01/01/09 01-2009	\$32086	\$20338	\$0	0	0	0	AUTO 060 \$575	AS AGREED	B
SALLIE MAE	08/01/05 42	01/01/09 01-2006	\$11475	\$14118	\$0	0	0	0	EDU UNK \$0	AS AGREED	J
<b>Remarks:</b> STUDENT LOAN-PAYMENT DEFERRED											
SALLIE MAE	08/01/06 30	01/01/09	\$11210	\$12840	\$0	0	0	0	EDU UNK \$0	AS AGREED	J
<b>Remarks:</b> STUDENT LOAN-PAYMENT DEFERRED											
CITI	01/01/97 99	02/01/09 02-2009	\$0	\$996	\$0	0	0	0	REV \$20	AS AGREED	B
CIT BANK/DFS	02/01/04 60	01/01/09 01-2009	\$5000	\$291	\$0	0	0	0	REV \$15	AS AGREED	B
EXXMBLCITI	01/01/05 23	02/01/09 02-2009	\$1900	\$196	\$0	0	0	0	REV \$10	AS AGREED	B
MCYDSNB	10/01/83 30	02/01/09 12-2008	\$2000	\$97	\$0	0	0	0	REV \$5	AS AGREED	J
GEMB/JCP	02/01/83 99	02/01/09 01-2009	\$1200	\$73	\$0	0	0	0	REV \$15	AS AGREED	J
GEMB/DILLARDS	01/01/83 99	02/01/09 02-2009	\$4000	\$36	\$0	0	0	0	REV \$10	AS AGREED	J
AMERICAN HONDA FINANCE	03/01/00 8	11/01/00	\$15056	\$0	\$0	0	0	0	AUTO 060 \$0	AS AGREED	B
BALLY TOTAL FITNESS	01/01/88 1	02/01/03	\$1102	\$0	\$0	0	0	0	INST 024 \$0	AS AGREED	B
<b>Remarks:</b> INSTALLMENT SALES CONTRACT											
BANK OF AMERICA	05/01/02 30	10/01/04	\$11680	\$0	\$0	0	0	0	AUTO 060	AS AGREED	B

CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE			TYPE TERMS	PRESENT STATUS	E C O A
						30	60	90+			
									\$0		
BANK OF AMERICA	12/01/99 24	11/01/01	\$4478	\$0	\$0	0	0	0	INST 036 \$0	AS AGREED	J
	<b>Remarks:</b> INSTALLMENT LOAN										
CHASE	12/01/01 6	06/01/02	\$8122	\$0	\$0	0	0	0	AUTO 048 \$0	AS AGREED	B
CHASE	05/01/99 11	03/01/00	\$20891	\$0	\$0	0	0	0	AUTO 060 \$0	AS AGREED	B
CHASE	09/01/94 79	02/01/09 02-2007	\$21000	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
CITI/SHELL	09/01/83 88	02/01/09 01-2009	\$800	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
CITIFINANCIAL RETAIL S	03/01/01 35	12/01/03	\$1688	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
COMPASS BANK	07/01/04 34	04/01/07 03-2007	\$33949	\$0	\$0	0	0	0	AUTO 066 \$0	AS AGREED	B
CREDIT UNION OF TEXAS	01/01/02 51	04/01/06 07-2005	\$5000	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
	<b>Remarks:</b> ACCOUNT CLOSED DUE TO TRANSFER OR REFINANCE; ACCOUNT CLOSED DUE TO TRANSFER										
CREDIT UNION OF TEXAS	01/01/02 43	09/01/07 01-2006	\$1797	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
	<b>Remarks:</b> ACCOUNT CLOSED AT CONSUMER'S REQUEST										
DISCOVER FIN SVCS LLC	04/01/86 99	02/01/09 06-2004	\$11900	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
FIRST USA BANK N A	09/01/94 99	10/01/04	\$21000	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
	<b>Remarks:</b> ACCOUNT CLOSED AT CONSUMER'S REQUEST										
FORD CRED	10/01/00 19	04/01/02	\$29758	\$0	\$0	0	0	0	AUTO 060 \$0	AS AGREED	B
GDYR/CBSD	03/01/88 80	02/01/09 12-2008	\$4750	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
GMAC	10/01/04 28	02/01/07 01-2007	\$18088	\$0	\$0	0	0	0	AUTO 060 \$0	AS AGREED	B
GMAC	04/01/02 21	01/01/04	\$28851	\$0	\$0	0	0	0	AUTO 066 \$0	AS AGREED	B
GNB/BEALLS	03/01/98 66	08/01/03	\$2400	\$0	\$0	0	0	0	REV \$0	AS AGREED	P
	<b>Remarks:</b> TRANSFERRED TO ANOTHER LENDER; PURCHASED BY ANOTHER LENDER										
SEARS/CBSD	12/01/79 99	02/01/09 03-2000	\$20000	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
TEXANS CREDIT UNION	04/01/05 42	09/01/08 08-2008	\$15000	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
	<b>Remarks:</b> CHECK CREDIT OR LINE OF CREDIT										
TEXANS CREDIT UNION	08/01/95 99	01/01/04	\$26005	\$0	\$0	0	0	0	AUTO 045 \$0	AS AGREED	B
THE AMERICAN NATL BANK	12/01/96 1	09/01/02	\$127400	\$0	\$0	0	0	0	MTG 030 \$0	AS AGREED	P
	<b>Remarks:</b> CONVENTIONAL REAL ESTATE LOAN, INCLUDING PURCHASE MONEY FIRST										
TRANSAMERICA BANK	02/01/01 14	04/01/02	\$6000	\$0	\$0	0	0	0	REV \$0	AS AGREED	P
	<b>Remarks:</b> TRANSFERRED TO ANOTHER LENDER										
US BANK	12/01/03	08/01/04	\$31308	\$0	\$0	0	0	0	AUTO	AS AGREED	B

CREDITOR	OPENING DATE MONTHS REVIEWED	REPORTED DATE DLA	HIGH CREDIT	BALANCE	PAST DUE AMOUNT	HISTORICAL TIMES PAST DUE			TYPE TERMS	PRESENT STATUS	E C O A
						30	60	90+			
	9								066 \$0		
US BANK/NA ND	09/01/08 5	01/01/09 12-2008	\$1000	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
USAA FEDERAL SAVINGS B	04/01/91 99	02/01/09 01-2009	\$17500	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
WFNNB/BEALLS	03/01/98 85	02/01/09 03-2008	\$2400	\$0	\$0	0	0	0	REV \$0	AS AGREED	J
WFNNB/VICTORIAS SECRET	12/01/93 38	02/01/09 02-2009	\$1250	\$0	\$0	0	0	0	REV \$0	AS AGREED	B
CREDIT UNION OF TEXAS	01/01/02 49	09/01/07 01-2006	\$5000	\$	\$0	0	0	0	REV \$0	CRCDLOST	J

Remarks: CREDIT CARD LOST OR STOLEN

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

**Public Records**

NO PUBLIC RECORDS DEVELOPED

**Prior Inquiries**

CREDITOR	INQUIRY TYPE	DATE	SRC	ECOA
NO PRIOR INQUIRIES DEVELOPED				

**Repository Remarks**

- XP CONSUMER STATEMENT: 27& 11-11-08 2499947 ID SECURITY ALERT: FRAUDULENT APPLICATIONS MAY BE SUBMITTED IN MY NAME OR MY IDENTITY MAY HAVE BEEN USED WITHOUT MY CONSENT TO FRAUDULENTLY OBTAIN GOODS OR SERVICES. DO NOT EXTEND CREDIT WITHOUT FIRST VERIFYING THE IDENTITY OF THE APPLICANT. I CAN BE REACHED AT 972-977-7184. THIS SECURITY ALERT WILL BE MAINTAINED FOR 90 DAYS BEGINNING 11-11-08.
- XP CONSUMER STATEMENT: USER ACKNOWLEDGES RECEIPT OF A COPY OF THE SUMMARY OF THE CONSUMER'S RIGHTS PRESCRIBED BY THE FEDERAL TRADE COMMISSION UNDER SECTION 609 (c) (3) OF THE FCRA ("CONSUMER'S RIGHTS"). BY ACCEPTING THIS REPORT, THE USER HEREBY CERTIFIES AND CONFIRMS THAT HE OR SHE WILL ATTACH A COPY OF THE CONSUMER'S RIGHTS TO THE REPORT AS REQUIRED BY SECTION 604 (b) (1) (B) OF THE FCRA.

**Source Information**

**Creditors**

CREDITOR	SUB CODE	ADDRESS	PHONE
AMERICAN HONDA FINANCE	3600888	3625 W ROYAL LN STE 200, IRVING, TX 75063	214-277-5200
BALLY TOTAL FITNESS	0300750	7755 CENTER AVE STE 440, HUNTINGTON BEACH, CA 92647	562-484-2980
BANK OF AMERICA	1198830	201 N TRYON ST, CHARLOTTE, NC 28255	BYMAILONLY
CHASE	1101969	201 N WALNUT ST # DE1-10, WILMINGTON, DE 19801	BYMAILONLY
CITI CC	1240000	PO BOX 6500, SIOUX FALLS, SD 57117	800-843-0777
CITIFINANCIAL RETAIL S	1138180	PO BOX 6080, NEWARK DE 19714	1-800-643-5607
COMPASS BANK	1100940	15 20TH ST S FL 9, BIRMINGHAM, AL 35233	205-558-6403
COUNTRYWIDE HOME LOANS	3991532	400 COUNTRYWIDE WAY, SIMI VALLEY, CA 93065	805-520-5100
CREDIT UNION OF TEXAS	3240147	PO BOX 515169, DALLAS, TX 75251	972-669-9166
DELL FINANCIAL SVCS/CI	1616760	3500A WADLEY PL, AUSTIN, TX 78727	800-955-3355
DISCOVER FINANCIAL SVC	3276502	PO BOX 15316, WILMINGTON DE 19850	800-347-2683
EXXMBLCITI	1402260	PO BOX 6497, SIOUX FALLS, SD 57117	800-950-5114
FIRST USA BANK N A	1260958	1523 CONCORD PK, WILMINGTON, DE 19803	800-955-9900
FIRSTAR	1183670	PO BOX 2188, OSHKOSH, WI 54903	800-934-8849
FORD CRED	1631440	PO BOX BOX 542000, OMAHA, NE 68154	800-727-7000
GEMB/DILLARDS	1355850	PO BOX 981400, EL PASO, TX 79998	BYMAILONLY
GEMB/JCP	3321860	PO BOX 984100, EL PASO, TX 79998	800-542-0800
GMAC	2611005	PO BOX 2150, GREELEY, CO 80632	800-200-4622
GNB/BEALLS	3376833	1020 WILLOWCREEK DR, JACKSONVILLE, TX 75766	BYMAILONLY
MCYDSNB	1362830	9111 DUKE BLVD, MASON, OH 45040	800-458-6229
NISSAN MOTOR ACCEPTANC	3696046	PO BOX 660360, DALLAS, TX 75266	800-950-6622
SALLIE MAE 3RD PTY LSC	1993837	1002 ARTHUR AVE, PANAMA CITY, FL 32401	900-555-7562
SEARS/CBSD	1230730	PO BOX 6189, SIOUX FALLS, SD 57117	BYMAILONLY
TEXANS CREDIT UNION.	2760049	777 E CAMPBELL RD, RICHARDSON, TX 75081	BYMAILONLY
THE AMERICAN NATL BANK	3183032	PO BOX 40, TERRELL, TX 75160	972-524-3411
TRANSAMERICA BANK	1673018	11227 LAKEVIEW AVE, LENEXA, KS 66219	BYMAILONLY
US BANK/NA ND	3143770	4325 17TH AVE SW, FARGO ND 58125	BYMAILONLY
USAA FEDERAL SAVINGS B	2201031	PO BOX 47504, SAN ANTONIO, TX 78265	BYMAILONLY
WFNNB/BEALLS	1350930	PO BOX 2974, MISSION, KS 66201	800-315-7260

**Submission Results**

APPLICANT	BUREAU	DATE	RESULT
APPLICANT	EXPERIAN	02/27/09 08:46:32 AM	RECORD FOUND

**Repository Referral**

Experian  
 P.O. Box 2002  
 Allen, TX 75013  
 888-397-3742

**Comments**

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

**Investigative**

**County Criminal Records Search**

RESULTS	No Reportable Records Found		
NAME SEARCHED	FLINTSTONE, FRED	SEARCH DATE	02-27-2009 12:29 PM
DOB SEARCHED	09-29-XXXX	SEARCH SCOPE	7 years
JURISDICTION	TX-HUNT		

RESULTS	No Reportable Records Found		
NAME SEARCHED	FLINTSTONE, FRED	SEARCH DATE	02-26-2009 12:58 PM
DOB SEARCHED	09-29-XXXX	SEARCH SCOPE	7 years
JURISDICTION	TX-ROCK		

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

**COLLIN COUNTY**

NO REPORTABLE RECORDS FOUND  
 FREDERICK FLINTSTONE  
 02/26/09

**DALLAS COUNTY**

NO REPORTABLE RECORDS FOUND  
 FREDERICK FLINTSTONE  
 02/26/09

**DENTON COUNTY**

NO REPORTABLE RECORDS FOUND  
 FREDERICK FLINTSTONE  
 02/26/09

**Nationwide Wants and Warrants**

NO OPEN WANTS OR WARRANTS FOUND  
 FREDERICK FLINTSTONE  
 02/27/09

**TARRANT COUNTY**

NO REPORTABLE RECORDS FOUND  
 FREDERICK FLINTSTONE  
 02/26/09

**State Criminal Records Search**

RESULTS	No Reportable Records Found		
NAME SEARCHED	FLINTSTONE, FREDERICK	SEARCH DATE	02-26-2009 12:59 PM
DOB SEARCHED	09-29-XXXX	SEARCH SCOPE	7 years
JURISDICTION	TEXAS		

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

**Federal Criminal Records Search**

RESULTS	No Reportable Records Found
---------	-----------------------------



NAME SEARCHED FLINTONE, FREDERICK  
DOB SEARCHED 09-29-XXXX  
JURISDICTION TEXAS NORTHERN

SEARCH DATE 02-26-2009 12:59 PM  
SEARCH SCOPE 7 years

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

---

**InstaCriminal National Search**

RESULTS No Reportable Records Found  
NAME SEARCHED FLINTSTONE, FREDERICK SEARCH DATE 02-26-2009 8:46 AM  
DOB SEARCHED 09-29-XXXX SEARCH SCOPE  
JURISDICTION NATIONWIDE

JURISDICTION(S) SEARCHED

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

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

---

**Global Homeland Security Search**

RESULTS No Reportable Records Found  
NAME SEARCHED FLINTSTONE, FREDERICK SEARCH DATE 02-26-2009 8:46 AM  
SOURCES Australian Reserve Bank Sanctions List  
Bank of England Sanctions List  
Debarred Parties List (Directorate of Defense Trade Controls)  
Denied Persons List  
European Union Terrorism Sanctions List  
FDA Office of Regulatory Affairs Debarment List  
Fugitive List  
Health and Human Services Exclusion List  
Interpol Most Wanted  
Office of the Comptroller of Currency Enforcement Actions List  
OFAC (Specially Designated Nationals List)  
Office of Thrift Supervision (OTS)  
OFSI (Canadian Sanctions List)  
United Nations Consolidated Sanctions List  
Palestinian Legislative Council List  
US General Services Administration Excluded Parties List  
World Bank Listing of Ineligible Individuals

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

---

**Sex Offender Records Search**

RESULTS No Reportable Records Found  
NAME SEARCHED FLINTSTONE, FREDERICK SEARCH DATE 02-26-2009 12:59 PM  
DOB SEARCHED 09-29-XXXX SEARCH SCOPE  
JURISDICTION TEXAS

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

---

**County Civil Records Search**

RESULTS No Reportable Records Found  
NAME SEARCHED FLINTSTONE, FREDERICK SEARCH DATE 02-26-2009 1:00 PM  
DOB SEARCHED 09-29-XXXX SEARCH SCOPE 7 years  
JURISDICTION TX-COLLIN

RESULTS	No Reportable Records Found	SEARCH DATE	02-27-2009 12:39 PM
NAME SEARCHED	FLINTSTONE, FREDERICK	SEARCH SCOPE	7 years
DOB SEARCHED	09-29-XXXX		
JURISDICTION	TX-TILE		

RESULTS	No Reportable Records Found	SEARCH SCOPE	7 years
NAME SEARCHED	FLINTSTONE, FREDERICK		
DOB SEARCHED	09-29-XXXX		
JURISDICTION	TX-ROCK		

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

---

**Credentials**

---

**Instant Driving Records**

---

RESULTS	License Found	SEARCH DATE	02-26-2009 8:46 AM
STATE OF ISSUE	Texas		
LICENSE NUMBER	05554441		
License Number:	05554441		
License State:	TX		
Full Name:	FLINTSTONE, FREDERICK		
DOB:	XXXX-09-29		
Address:	480 HOWELL RD BEDROCK, TX 751890000		

**License Info**

Status:	CLEAR
Class:	CM
Class Description:	C - Single or comb veh , not in class A or B,M - Motorcycle or moped
Expiration Date:	2013-09-29
Original Issue Date:	1974-10-10

**Other License Info**

Report Message:	RECORD CONTAINS NO REPORTED CONVICTIONS OR ACCIDENTS WITH CITATIONS IN LAST 3 YEARS.
MVR Status:	MVR found
MVR Score:	0

**Messages**

COURSE.	THIS TYPE RECORD WILL NOT REFLECT COMPLETION OF A DRIVING SAFETY
	THIS TYPE RECORD WILL NOT REFLECT OFFENSES OR RELATED SUSPENSIONS
UNDER	ALCOHOL BEVERAGE CODE 106.041 OR 106.071.

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

---

COMPREHENSIVE REPORT

---

**Subject Information:**

Name: **FREDERICK FLINTSTONE**  
Date of Birth: **9/29/1959**  
Age: **49**  
SSN: **123-44-5678** issued in Texas  
between **1/1/1974** and **12/31/1974**

**Names Associated With Subject:**

FRED FLINTSTONE DOB: 1/1960 Age: 49  
452-27-xxxx issued in Texas between 1/1/1974 and 12/31/1974  
FRED R FLINTSTONE DOB: 9/29/1959 Age: 49  
452-27-xxxx issued in Texas between 1/1/1974 and 12/31/1974

**Others Associated With Subjects SSN:**

(DOES NOT usually indicate any type of fraud or deception)  
[None Found]

**Comprehensive Report Summary:**

Names Associated With Subject	2 Found
Others Associated With Subjects SSN	None Found
Possible Criminal Records	None Found
Sexual Offenses	None Found
Motor Vehicles Registered	8 Found
Concealed Weapons Permit	None Found
Professional Licenses	None Found
FAA Aircrafts	None Found
Watercraft	None Found
Bankruptcies	None Found
Liens and Judgments	None Found
UCC Filings	1 Found
Possible Properties Owned	0 Found

**Address Summary:**

Address	County	Dates	Maps
480 HOWELL RD, BEDFORD TX 75189-6108			
1006 COLUMBINE DR, SUGAR TX 75043-1815	DALLAS	May 1984 - Jun 2004	N/A
306 W VISTA DR, SUGAR TX 75041-3025		Apr 2002 - Jun 2002	N/A
1518 COLONEL DR, SUGAR TX 75043-1219	WHARTON	May 1984 - Nov 2000	N/A
1824 DEVONSHIRE DR, SUGAR TX 75041-1515	DALLAS	May 1984 - Dec 1990	N/A

**Active Address(es):**

480 HOWELL RD, BEDFORD TX 75189-6108, COLLIN COUNTY (Apr 1993 - Feb 2009)

**Current Residents at Address:**

FRED FLINTSTONE  
WILMA FLINTSTONE  
PEBBLE FLINTSTONE

**Property Ownership Information for this Address**

**Property:**

Parcel Number -  
Name Owner : FLINTSTONE, FREDERICK  
Property Address: - 480 HOWELL RD, BEDFORD TX 75189-6108, TILE COUNTY  
Owner Address: 480 HOWELL RD, BEDFORD TX 75189-6108, TILE COUNTY  
Data Source - A

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

1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY (May 1984 - Jun 2004)

**Current Residents at Address:**

P GREEN  
DANNY GREEN

**Property Ownership Information for this Address**

**Property:**

Parcel Number - 26--005-023-0000  
Book - 98108  
Page - 1686  
Name Owner : GREEN P W  
Name Owner 2: GREEN DANNY D  
Property Address: - 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Owner Address: 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Land Usage - SFR  
Total Market Value - \$101,070  
Land Value - \$24,000  
Improvement Value - \$77,070  
Land Size - 7,183 Square Feet  
Year Built - 1978  
Name of Seller : FLINTSTONE, FRED  
Loan Amount - \$74,131

Loan Type - FEDERAL HOUSING AUTHORITY  
Lender Name - CTX MTG CO  
Data Source - A

**Property:**

Parcel Number -  
Name Owner : GREEN, P  
Property Address: - 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Owner Address: 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Name of Seller : FLINTSTONE, FRED & WILMA  
Data Source - A

**Property:**

Parcel Number - 26-3330-005-023-00-00  
Book - 96168  
Page - 1686  
Name Owner : GREEN PW & DANNY  
Property Address: - 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Owner Address: 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Land Usage - SINGLE FAMILY RESIDENTIAL  
Total Market Value - \$101,070  
Land Value - \$24,000  
Improvement Value - \$77,070  
Year Built - 1978  
Data Source - B

306 W VISTA DR, SUGAR TX 75041-3025, ROCK COUNTY (Apr 2002 - Jun 2002)

**Current Residents at Address:**

BARNEY RUBBLE  
BETTY RUBBLE  
BAM BAM RUBBLE  
BECKY RUBBLE

**Property Ownership Information for this Address**

**Property:**

Parcel Number - 26-4-009-0000  
Name Owner : RUBBLE, BARNARD  
Property Address: - 306 W VISTA DR, SUGAR TX 75041-3025, ROCK COUNTY  
Owner Address: 306 W VISTA DR, SUGAR TX 75041-3025, ROCK COUNTY  
Total Market Value - \$95,240  
Land Value - \$13,750  
Improvement Value - \$81,490  
Land Size - 9,239 Square Feet  
Year Built - 1959  
Name of Seller : FLINTSTONE, FRED  
Loan Amount - \$96,337  
Loan Type - FEDERAL HOUSING AUTHORITY  
Lender Name - AMERICAN MTG CO  
Data Source - A

1518 COLONEL DR, SUGAR TX 75043-1219, WHINEY COUNTY (May 1984 - Nov 2000)

**Current Residents at Address:**

MICKEY MOUSE JR  
MINNE MOUNSE

**Property Ownership Information for this Address**

**Property:**

Parcel Number - 26-007-013-0000  
Name Owner : MOUSE, MICKEY  
Property Address: - 1518 COLONEL DR, SUGAR TX 75043-1219, ROCK COUNTY  
Owner Address: 1518 COLONEL DR, SUGAR TX 75043-1219, ROCK COUNTY  
Total Market Value - \$171,120  
Land Value - \$40,000  
Improvement Value - \$131,120  
Land Size - 12,000 Square Feet  
Year Built - 1978  
Data Source - A

1824 DEVONSHIRE DR, SUGAR TX 75041-1515, ROCK COUNTY (May 1984 - Dec 1990)

**Current Residents at Address:**

SPONGEBOB SQUAREPANTS  
PATRICK STAR

**Property Ownership Information for this Address**

**Property:**

Parcel Number - 26-2-006-00-00  
Book - 93094  
Page - 2306  
Name Owner : CRABB FAMILY PARTNERSHIP LTD  
Property Address: - 1824 DEVONSHIRE DR, SUGAR TX 75041-1515, ROCK COUNTY  
Owner Address: 7602 MERRITT RD, OCEAN TX 75089-2100, LIME COUNTY  
Land Usage - SINGLE FAMILY RESIDENTIAL  
Total Market Value - \$27,590  
Land Value - \$16,000  
Improvement Value - \$11,590  
Year Built - 1951  
Data Source - B

**Possible Criminal Records:**

[None Found]

**Sexual Offenses:**

[None Found]

**Motor Vehicles Registered To Subject:**

**Vehicle:**

Description: 2004 Cadillac CTS - Sedan 4 Door  
VIN: 1G640126002  
State Of Origin: TEXAS  
Engine: 6 Cylinder 220 Cubic Inch  
Anti Lock Brakes: 4 wheel standard  
Air Conditioning: Standard  
Daytime Running Lights: Standard

Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Standard  
Security System: Pass key  
Roof: None / not available  
Price: 30835  
Radio: AM/FM Cassette  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Standard

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDFORD TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 05743132091858  
Title Status: Clear Title To Vehicle  
Title Issue Date: 1/7/2004  
Odometer Mileage: 93

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 12/6/2003

**Vehicle:**

Description: 2004 Chevrolet C1500 Silverado - Pickup  
VIN: 1GCEXXXX244320  
State Of Origin: TEXAS  
Engine: 6 Cylinder 262 Cubic Inch  
Anti Lock Brakes: 4 wheel standard  
Air Conditioning: Standard  
Daytime Running Lights: Standard  
Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Optional  
Security System: Pass key  
Roof: None / not available  
Price: 20215  
Radio: AM/FM Cassette  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Standard

**Owner(s)**

Name: FREDERICK FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDROCK TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 12920170092203  
Title Status: Clear Title To Vehicle  
Title Issue Date: 11/5/2004  
Odometer Mileage: 115

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 10/9/2004

**Vehicle:**

Description: 2000 Honda XR80R - Dirt Motorcycle  
VIN: JH2XXX6YK901447  
State Of Origin: TEXAS  
Engine: 1 Cylinder 80 Cubic Inch  
Price: 1999

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDFORD TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 116001150305  
Title Status: Superceded By Title-In-Progress  
Title Issue Date: 12/17/1999  
Odometer Mileage: 1

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 12/4/1999

**Vehicle:**

Description: 2005 Cadillac C/T CTS HI Feature V6 - Sedan 4 Door  
VIN: 1G6DP56751415  
State Of Origin: TEXAS  
Engine: 6 Cylinder 220 Cubic Inch  
Anti Lock Brakes: 4 wheel standard  
Air Conditioning: Standard  
Daytime Running Lights: Standard  
Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Standard  
Security System: Pass key

Roof: None / not available  
Price: 32440  
Radio: AM/FM CD  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Standard

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDROCK TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 043133420  
Title Status: Clear Title To Vehicle  
Title Issue Date: 8/16/2004  
Odometer Mileage: 7

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 7/23/2004

**Vehicle:**

Description: 2002 Chevrolet C1500 Tahoe - 4 Dr Wagon Sport Utility  
VIN: 1GNEC1XXX227917  
State Of Origin: TEXAS  
Engine: 8 Cylinder 293 Cubic Inch  
Anti Lock Brakes: 4 wheel standard  
Air Conditioning: Standard  
Daytime Running Lights: Standard  
Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Standard  
Security System: Anti-theft device  
Roof: None / not available  
Price: 32364  
Radio: AM/FM CD  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Standard

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDFORD, TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 19360083955  
Title Status: Superseded By Title-In-Progress  
Title Issue Date: 4/30/2002  
Odometer Mileage: 240

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 4/4/2002

**Vehicle:**

Description: 2002 Dodge Ram 1500 - Pickup  
VIN: 1XXXK72J232340  
State Of Origin: TEXAS  
Engine: 6 Cylinder 225 Cubic Inch  
Restraints: Dual front air bags/active belts  
Anti Lock Brakes: 4 wheel standard  
Air Conditioning: Standard  
Daytime Running Lights: Not available  
Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Optional  
Security System: Unknown  
Roof: None / not available  
Price: 16955  
Radio: AM/FM Cassette  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Optional

**Owner(s)**

Name: JODY L LAY  
Potential SSN : 452-27-xxxx  
Address: 480 HOWELL RD, ROYSE CITY TX 75189-6108, COLLIN COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 12925037394135717  
Title Status: Clear Title To Vehicle  
Title Issue Date: 6/5/2002  
Odometer Mileage: 15

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 5/8/2002

**Vehicle:**

Description: 2000 Yamaha RT100 - Trail/Dirt Motorcycle  
VIN: JYA3UL033YA000475

State Of Origin: TEXAS  
Engine: 1 Cylinder 97 Cubic Inch  
Price: 2049

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDFORD, TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 11601150728  
Title Status: Clear Title To Vehicle  
Title Issue Date: 12/17/1999  
Odometer Mileage: 1

**Lien Holder(s)**

Record Type: CURRENT  
Lien Date: 12/3/1999

**Vehicle:**

Description: 1999 Ford F250 Super Duty - 4 Door Ext. Cab Pickup  
VIN: 1FTXX1XED28242  
State Of Origin: TEXAS  
Engine: 8 Cylinder 330 Cubic Inch  
Restraints: Dual front air bags/active belts  
Anti Lock Brakes: ABS standard, wheels unknown  
Air Conditioning: Optional  
Daytime Running Lights: Optional  
Power Steering: Standard  
Power Brakes: Standard  
Power Windows: Optional  
Security System: Unknown  
Roof: None / not available  
Price: 20820  
Radio: AM/FM  
Front Wheel Drive: No  
Four Wheel Drive: No  
Tilt Wheel: Optional

**Owner(s)**

Name: FRED FLINTSTONE  
Potential SSN : 123-44-5678  
Address: 480 HOWELL RD, BEDFORD TX 75189-6108, TILE COUNTY  
DOB: 9/29/1959  
Age: 49  
Title Number: 0574525100  
Title Status: Clear Title To Vehicle  
Title Issue Date: 3/4/1999  
Odometer Mileage: 17

**Lien Holder(s)**

Record Type: HISTORICAL  
Lien Date: 2/3/1999

**Concealed Weapons Permit:**

[None Found]

**Professional License(s):**

[None Found]

**FAA Aircrafts:**

[None Found]

**Watercraft:**

[None Found]

**Bankruptcies:**

[None Found]

**Liens and Judgments:**

[None Found]

**UCC Filings:**

Filing Agency Address:  
Filing State: TXD

**Debtor(s):**

Debtor Name: FREDERICK FLINTSTONE  
Debtor SSN/FEIN: 123-44-5678  
Debtor Address: 1006 COLUMBIA DR, SUGAR TX 75043

**Secured(s):**

Secured Name: NORTH PARK NATL BK  
Secured Address: DALLAS TX 75225

**Filing(s):**

Filing Type:  
Filing Number: 01122298  
Date Filed: Apr 19, 1990  
Pages: 20

**Possible Properties Owned by Subject:**

**Property:**

Parcel Number - 4495-0000-0003-00-0R  
Book - 772  
Page - 322

Name Owner : FLINTSTONE, FRED & WILMA  
Property Address: - 480 HOWELL RD, BEDROCK TX 75189-6108, TILE COUNTY  
Owner Address: 480 HOWELL RD, BEDROCK TX 75189-6108, TILE COUNTY  
Land Usage - SINGLE FAMILY RESIDENTIAL  
Total Market Value - \$195,550  
Assessed Value - \$195,550  
Land Value - \$31,950  
Improvement Value - \$163,600  
Year Built - 1996  
Data Source - B

**Property:**

Parcel Number - 26-2-023-0000  
Book - 96168  
Page - 1686  
Name Owner : GREEN DW  
Name Owner 2: GREEN P  
Property Address: - 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Owner Address: 1006 COLUMBINE DR, SUGAR TX 75043-1815, ROCK COUNTY  
Land Usage - SFR  
Total Market Value - \$101,070  
Land Value - \$24,000  
Improvement Value - \$77,070  
Land Size - 7,183 Square Feet  
Year Built - 1978  
Name of Seller : FLINTSTONE, FRED & WILMA A  
Loan Amount - \$74,131  
Loan Type - FEDERAL HOUSING AUTHORITY  
Lender Name - MTG CO  
Data Source - A

---

**Disclaimer**

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

---

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

---



# MANAGEMENT PROFILE

---

EVERYTHING **DiSC**  
MANAGEMENT

*ASSESSMENT TO ACTION.*

**Casey Tyler**

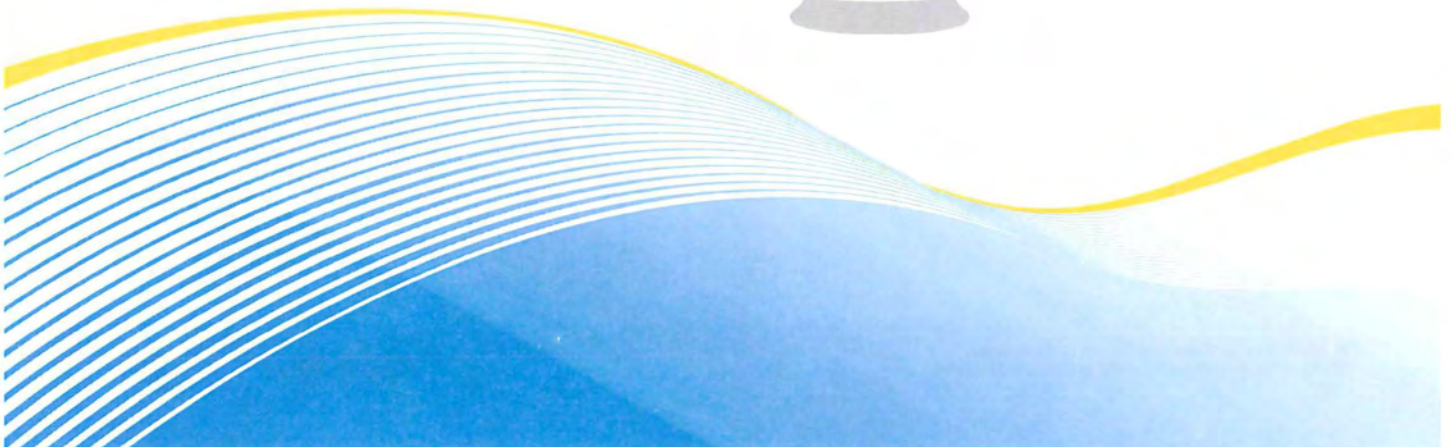
Monday, September 16, 2013

This report is provided by:

Strategic Government Resources, Inc.  
Ron Hollifield  
PO Box 1642  
Keller, TX 76244  
817-337-8581  
[www.GovernmentResource.com](http://www.GovernmentResource.com)



*by Inscape Publishing*



## Welcome to Everything DiSC®

Everything DiSC® Management Profile

## Your DiSC® Management Style

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. Recently, you had the opportunity to take an assessment that asked you to describe how frequently each adjective describes you. Based on your responses, your unique data is expressed visually on the Everything DiSC Management Map. On page 3, you'll discover where you fit on the map.

### Cornerstone Principles of Everything DiSC Management

- All DiSC® styles are **equally valuable**, and people with all styles can be effective managers.
- Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- By carefully observing the behavior of other people, you can learn to **recognize** the DiSC styles of colleagues, friends, and clients.
- The ability to **adapt your behavior** to other DiSC styles can help you manage more effectively.
- You can **help colleagues** adapt their own behavior by explaining your needs and preferences more clearly.

The Everything DiSC Management Map shows **four basic styles** that describe how people approach their work and relationships.

#### Dominance (D):

- Direct
- Results-oriented
- Firm

#### Influence (i):

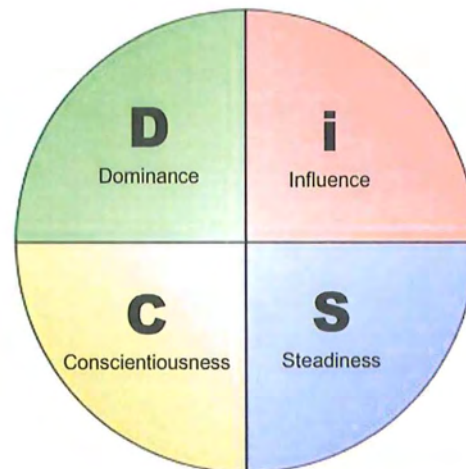
- Outgoing
- Enthusiastic
- Optimistic

#### Conscientiousness (C):

- Analytical
- Reserved
- Precise

#### Steadiness (S):

- Even-tempered
- Accommodating
- Patient



Because there are more than four types of people in the world, the **circular DiSC model** shows the continuous relationships among styles. Everyone is a **blend** of all four styles, but most people tend most strongly toward one or two styles. For instance, people who select many responses linked to the D style will fall within that region, whereas those who select mostly S and C responses have a **combination style** that includes some aspects of both the S and C regions.

## Introduction

Everything DiSC® Management Profile

### What Does Your Map Say about You, Casey?

In order to get the most out of your *Everything DiSC® Management Profile*, Casey, you'll need to understand how to read your personal map. Because your map will appear throughout the profile, you can refer to it as you read your feedback.

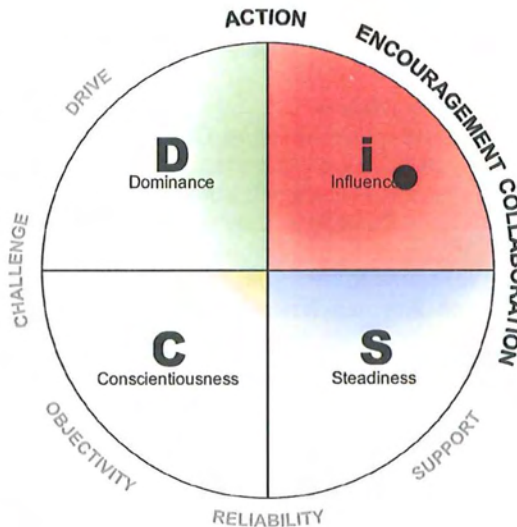
Casey, the picture to the right shows your **Everything DiSC Management Map**. The eight words around the map represent the **priorities** of the styles at work. When we talk about priorities, we mean the primary areas where people focus their energy.

#### Your Style: i

Your dot **location** shows your Everything DiSC Management style. Because your dot is in the i region, this is your **primary style**. Note that the map **shading** also illustrates how likely you are to use each style.

Your dot's **distance from the edge** of the circle shows how natural the i style is for you. Because your dot is near the edge of the circle, you probably stick closely to your i style and put a very high priority on Encouragement, Action, and Collaboration. Because the C priorities are farthest away on the map from your dot, Objectivity, Reliability, and Challenge may be a lot less comfortable for you.

Now that you know where you fall on the Everything DiSC Management Map, you'll read about the management priorities and preferences associated with the i style. Using this knowledge, you'll learn how to use Everything DiSC principles to improve your ability to direct, delegate, motivate, and develop others more successfully. Finally, you'll explore ways to work more effectively with your own manager.



## Your Management Priorities

Everything DiSC® Management Profile

Your i style can say a great deal about how you approach your position as a manager and what aspects of the job you see as most important. Overall, you probably put a priority on encouragement, collaboration, and action. This means that you tend to be upbeat and friendly. Others might describe you as lively and sociable. Most likely, you try to connect on a personal level with the people you manage. Below is a more in-depth discussion of the priorities associated with your style.

### Providing Encouragement

Like other managers with your i style, Casey, people's emotional needs are probably important to you, and you want members of your team to feel good about their contributions. So you may let them know what they're doing right by emphasizing the positive when discussing their work. Similarly, you take time to celebrate group victories and give public recognition. At times, however, your tendency to encourage people may keep you from delivering bad news, and you may gloss over poor performances. Therefore, you're unlikely to take a critical approach, and you probably want to ensure that people feel energized and optimistic about their work.

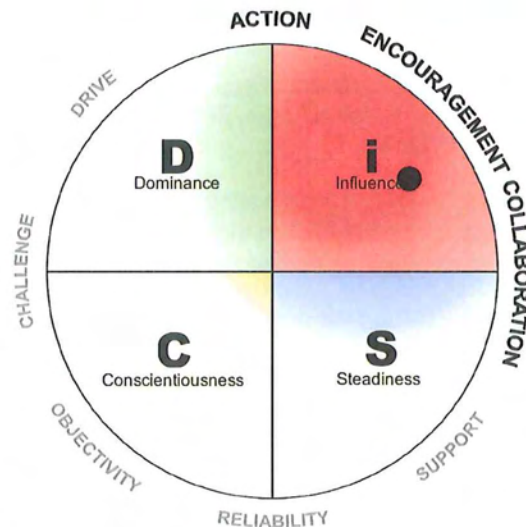
### Valuing Collaboration

You tend to value the importance of brainstorming and group effort, making collaboration a key component of how you work. You probably include others in important activities and decisions, and you may pride yourself on your ability to get everyone involved and build a team spirit. You may find it hard to understand people who are more reserved and prefer to work alone. Most likely, in your view, teamwork not only leads to better results, but makes the job much more fun.

### Emphasizing Action

Managers with your i style usually show a great deal of passion. They want to keep moving forward and make progress toward innovative or groundbreaking solutions. Therefore, you may avoid traditional or safe ideas in favor of more exciting proposals that ignite your enthusiasm. When you've picked an option that appeals to you, you may become so eager to get going that you skip over key details. Your pace might be too fast for some of the people you manage, and rather than slow down to meet their needs, you may encourage them to catch up to you.

## Your DiSC® Management Style



## Your Management Preferences

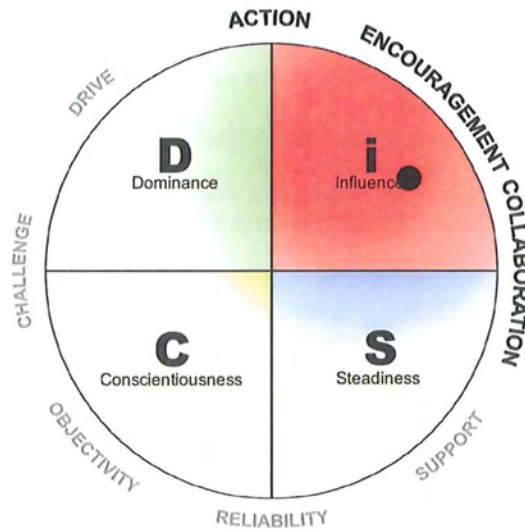
Everything DiSC® Management Profile

## Your DiSC® Management Style

### What do you enjoy about managing?

Different people find management rewarding for different reasons. Like other people with your i style, you may enjoy the opportunity to work with others toward a common goal, and you may strive to create a high-energy environment where people can express themselves. In addition, you likely appreciate that management allows you to help others in their professional development. You probably enjoy many of the following aspects of management:

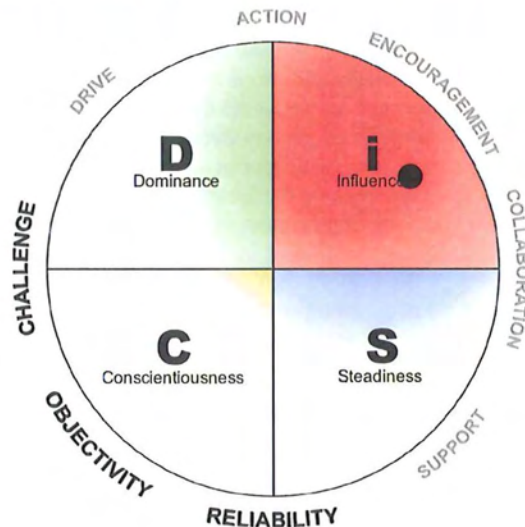
- Recognizing the good work of others
- Helping people work together
- Developing warm relationships with team members
- Keeping things moving
- Promoting creativity
- Inspiring others to do their best
- Getting people involved
- Increasing enthusiasm
- Building an optimistic mindset in others
- Helping a team progress toward a goal
- Creating a lively environment
- Meeting new people



### What drains your energy as a manager?

Then there are those management responsibilities that are stressful for you. Managers with the i style often focus on maintaining friendly relationships with people so they will be well-liked. As such, you could have problems pushing people to get results, especially if doing so requires you to confront them. At the same time, you may keep up such an energetic pace that you fail to allow time for analysis and accuracy, which can lead to problems down the road. Many of the following aspects of management may be draining for you:

- Giving people unpleasant feedback
- Undertaking detailed analyses
- Performing routine or systematic tasks
- Being forceful or insistent with others
- Slowing down to ensure accuracy and quality
- Being objective when evaluating others
- Working steadily toward long-term goals
- Acknowledging and addressing performance issues
- Supporting your position with facts rather than enthusiasm
- Making tough decisions independently
- Managing challenging or skeptical people
- Calculating risks



## Managing Your Day

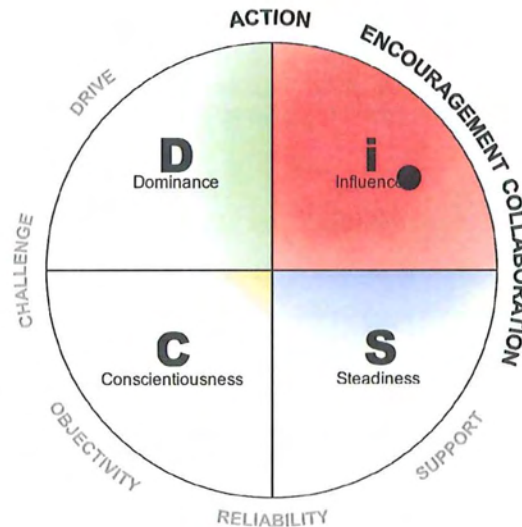
Everything DiSC<sup>®</sup> Management Profile

## Your DiSC<sup>®</sup> Management Style

### Time Management

It's easy to assume that everyone looks at time the same way. But the truth is we all have our own preferences and assumptions when it comes to managing time. As a manager, the way that you manage time has a significant impact on other people and the way that they can use their time. When it comes to your time management, you may

- Maintain enthusiasm even when under time pressure
- Make time to socialize with others
- Keep an active pace
- Be quite comfortable doing things spontaneously or at the last minute
- Waste time getting meetings started because of too much small talk or socializing
- Run late or miss deadlines
- Get bored with predictable routines or overly structured schedules
- Be overly optimistic when considering how much can be done in a short time
- Fail to push others to be better at managing their own time



### Decision Making & Problem Solving

As a manager, there are usually many approaches to solving problems or making decisions. Because you have an i style, you probably come at problems and decisions in ways that prioritize encouragement, action, and collaboration. In the areas of problem solving and decision making, you may

- Look for exciting or new solutions
- Prefer to make decisions based on your intuition or gut instinct
- Fail to consider facts and data that contradict the direction you prefer
- Make decisions quickly even with little information
- Be overly optimistic about your chances of success
- Downplay risks and obstacles
- Be willing to change course rapidly
- Like to include others in the decision-making process
- Weigh the impact that a decision will have on people's feelings
- Put off presenting unpopular decisions
- Have such passion for your decisions that it comes across as rash

## Your Directing & Delegating Style

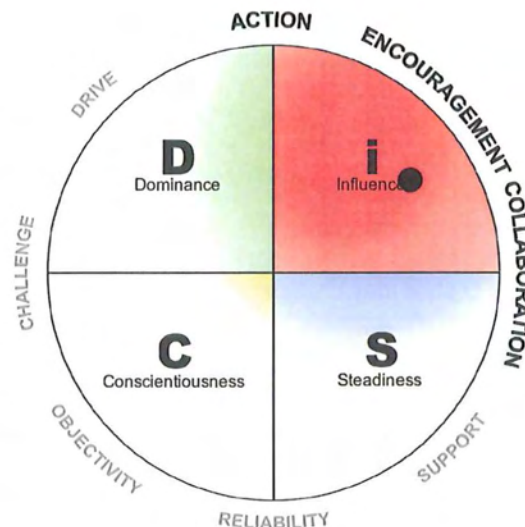
Everything DiSC® Management Profile

## Directing & Delegating

As a manager, you may find that effectively directing and delegating to people is more complex than simply handing off an assignment with a “please” and “thank you.” Perhaps you’ve noticed that certain people respond positively to different types of instruction and feedback. Some employees want specific directions and welcome objective feedback, while others want just the opposite. Based on your DiSC® style, you have a natural approach to directing and delegating. However, to maximize satisfaction and productivity, it’s important to consider how effective your approach may be with people of different styles.

Casey, because you place a strong emphasis on encouragement and collaboration, you tend to be optimistic about people and their abilities. For this reason, you usually give individuals the benefit of the doubt when delegating tasks, and you may assign responsibilities to team members without making sure they have the skills or experience to get the job done. You enjoy being friendly with people, and the people you manage may feel empowered by your trust in their abilities. However, when situations require a more direct, matter-of-fact approach, you may have trouble being tough and holding people accountable.

Your preference for action means that you tend to be fast-paced when directing people. You probably try to get others excited about their tasks, and you may cheer them on and make it clear that you have faith in their competency. However, you may not always be clear about your expectations for their performances, and your enthusiasm may overshadow the nuts and bolts of what is to be done. Along these lines, you may occasionally be vague about the specifics or skip the details in your zeal to get people moving.



### Directing & Delegating Strengths

- Allowing people to take on more responsibilities
- Giving direction in a friendly and positive manner
- Making people feel that they are important contributors
- Encouraging creativity in the execution of tasks
- Listening to people’s concerns about assignments
- Getting people moving
- Encouraging people to work through problems

### Directing & Delegating Challenges

- Missing deadlines
- Assuming that people will complete their tasks
- Failing to ensure that people understand their responsibilities
- Overestimating the abilities or competencies of people
- Being vague about the details
- Neglecting to hold people accountable for their actions
- Failing to check in on progress

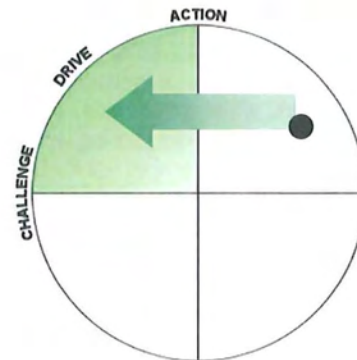
## Directing & Delegating to the D Style

Everything DiSC® Management Profile

## Directing & Delegating

### How does the D style like to work?

Like you, people with the D style are fast-paced. Furthermore, they are willing to take risks to achieve the bottom-line results they want, probably more so than you. They strive for ambitious goals, and they want the freedom to make their own decisions without having to ask for input from other people. Because they value their independence, they may not agree with your preference to collaborate with others and work closely as a team. Their autonomy also makes them less likely to appreciate the encouragement you frequently offer.



### Potential problems when working together

People with the D style may challenge your authority if they disagree with your decisions. They tend not to share your focus on other people's feelings, so they may be blunt or assertive when expressing their opinions to you or other team members. They may see your push for collaborative effort as unnecessary or even counterproductive, while you might have trouble understanding their desire to work independently. At the same time, because you tend to assume the best about people, you may mistake their self-assured attitude as competence, even if they don't have the skills or experience. In these cases, you may be surprised when they fail to deliver what you expected.

### How to be effective with the D style

People with the D style want to work on exciting projects that will have a big impact. Therefore, encourage them to tackle challenging tasks. Be clear about your expectations for their performance, and remember to place reasonable limits upon their authority. As part of this process, give them freedom to decide on methods and tactics, but make sure they don't try to make decisions that exceed their qualifications. If they have exhibited sound judgment in the past, show respect for their decision-making ability and avoid reining them in unless necessary. Given your i style, you may need to focus more closely on their skill level, and make sure to check in more frequently if they lack experience.

#### If they have less experience:

- Don't confuse confidence with competence
- Review their plans before they move ahead
- Check in often enough to make sure they're on track
- Have them check with you before any risky decisions are made
- Let them know that they will be given more autonomy as they gain experience

#### If they have more experience:

- Show them the simplest, quickest, and most practical way to be productive
- Be direct about the results you expect
- Give a deadline and let them figure out how to proceed
- Make sure they understand the consequences of their shortcuts
- Specify the limits of their authority, but allow them autonomy within those limits



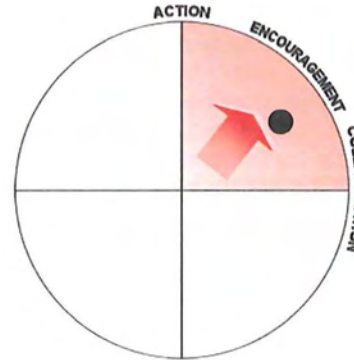
## Directing & Delegating to the i Style

Everything DiSC® Management Profile

## Directing & Delegating

### How does the i style like to work?

Like you, people with the i style move quickly and display enthusiasm for new or exciting projects. They enjoy spending time with other people, and they like to channel their high energy into collaborative efforts. For this reason, they may try to stay in frequent contact with you and look for as much interaction and encouragement as you're willing to provide. They may be eager to tackle creative projects, but they dislike assignments that isolate them or require them to perform routine tasks for long periods of time. They want the freedom to move at their own rapid pace while remaining connected to the team.



### Potential problems when working together

People with the i style want to work in a fun environment, and you probably also enjoy the social aspects of the job. However, at times you and the "i" people you manage may allow social needs to take precedence over the bottom line, and you may neglect to push them for practical results. Also, because you value friendly relationships, you may find it difficult to deliver negative feedback. Furthermore, because you both like to move quickly, you may fail to approach projects systematically and objectively.

### How to be effective with the i style

People with the i style want to know that they're essential members of a team. Give them opportunities to collaborate, but provide enough guidance to make sure that they don't spend too much time socializing. Because of their energy and enthusiasm, they may enjoy any project that necessitates quick thinking or fresh approaches. Check in frequently with those who lack experience to make sure they are on track and meeting deadlines. For those who are more experienced, encourage creativity and experimentation, but make sure vital details or tasks don't slip past. Given your i style, you may need to work at providing direct feedback and holding them accountable for results.

#### If they have less experience:

- Make sure they don't lose track of details
- Give them plenty of encouragement
- Limit their socializing
- Check their understanding of the task since their enthusiasm might hide a lack of clarity
- Hold them accountable for missed deadlines or skipped steps

#### If they have more experience:

- Allow them to take the lead in group settings
- Make time to go over the details with them
- Encourage them to keep moving forward
- Acknowledge their contributions publicly
- Check in often enough to keep them on track and on schedule

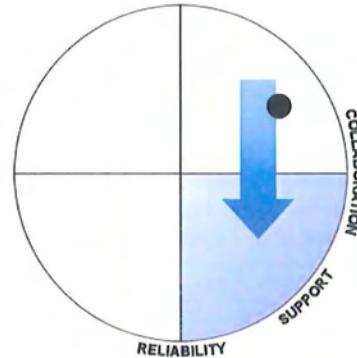
## Directing & Delegating to the S Style

Everything DiSC® Management Profile

## Directing & Delegating

### How does the S style like to work?

People with the S style appreciate a methodical pace, and they like to focus on tasks in a calm and orderly environment. They may find the more fast-paced setting that you prefer to be distracting or stressful. Because of their cautious nature, they may also need more hands-on support than you naturally provide. While they share your preference to collaborate with others, they will seldom push for more authority within the group because they are much more comfortable working behind the scenes.



### Potential problems when working together

People with the S style tend to make steady progress toward predictable goals, while you're more likely to rely on the power of enthusiasm and big ideas. As a result, they may become uncomfortable if you delegate high-pressure tasks to them or urge them to take risks. They dislike dealing with abrupt changes, so your tendency to make quick adjustments in the name of rapid progress may leave them disoriented. In addition, they seek well-established systems and procedures for accomplishing tasks, while you're usually willing to improvise. These individuals may look for more stability from you. In turn, you may become frustrated by their apparent hesitancy to take chances.

### How to be effective with the S style

People with the S style want to be given clear guidance, and they like to know exactly what is required to execute their tasks well. Given your i style, you may need to make an extra effort to supply the step-by-step instruction that they like. They appreciate frequent check-ins, and they'll respond positively if you give directions in a friendly manner that shows you're genuinely interested in their needs. For those who lack experience, slow down your pace to make sure they're comfortable with a task before setting them loose. For those with more experience, give them as much responsibility as you can, but avoid rushing them for quick answers, and make it clear that you're available to advise them when needed.

#### If they have less experience:

- Give clear, step-by-step directions
- Ask questions to confirm their understanding of the task
- Check in with them frequently
- Refrain from giving them too much responsibility too quickly
- Make sure they are comfortable with their role before pushing them to move ahead

#### If they have more experience:

- Ask enough questions to elicit their concerns before giving a task to them
- Give them additional responsibilities when they have mastered a task and seem ready for more challenges
- Encourage them to take the initiative at times
- Make yourself available as an advisor throughout the process
- Ask them directly about what kind of support they want from you

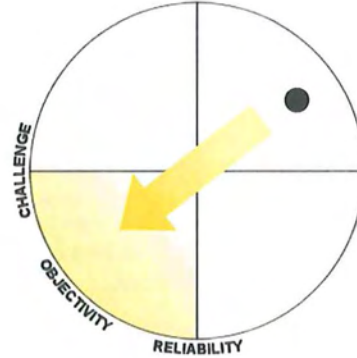
## Directing & Delegating to the C Style

Everything DiSC® Management Profile

## Directing & Delegating

### How does the C style like to work?

People with the C style relate best to logical objectives and fact-based ideas, especially those that have high quality as the ultimate goal. They prefer to go over options and proposals carefully, which is in contrast to your tendency to move quickly and avoid worrying about the details. Unlike you, they tend to prioritize facts and data over people's emotional needs. Furthermore, they're comfortable working alone, and they may even avoid the collaboration that you prefer. Therefore, they may require minimal face time. These individuals prefer to be given an assignment and then allowed time and space to complete it.



### Potential problems when working together

People with the C style take time to analyze concepts and examine (or re-examine) solutions. They rely on logic and objectivity, so your tendency to make decisions based on gut instinct may frustrate them. They may also see your socializing as unnecessary or intrusive, while you might see them as cold or aloof. In addition, these individuals prefer to move cautiously and focus narrowly in their quest to produce the highest quality solutions, and they may become annoyed if you pressure them to multitask or rush their efforts. In turn, you may think their tendency to go over solutions repeatedly stands in the way of progress.

### How to be effective with the C style

People with the C style want to receive clear directions that address goals, methods, and logistics. Given your i style, it may be challenging for you to give them the systematic direction they want. In addition, they respond well to tasks that require careful analysis, and they appreciate environments where they can work alone. Those with less experience may spend too much time analyzing and perfecting their work, so be sure to check in often enough to keep them on track. For those with more experience, allow more autonomy but set clear deadlines that keep them moving forward.

#### If they have less experience:

- Avoid forcing them to collaborate unless it's required by the task
- Help them set standards that meet their desire for quality without putting deadlines at risk
- Focus on clarity rather than enthusiasm when handing off tasks
- Make sure they have the resources they need
- Check in frequently to make sure they aren't getting bogged down

#### If they have more experience:

- Check in with them only when necessary to ensure forward progress
- Encourage them to come to you when they want more direction
- Listen to their concerns about quality
- Allow them to work independently, but make sure they bring issues to the team when necessary
- Give them opportunities to help solve complex issues that require logic

## Motivation and The Environment You Create

Everything DiSC<sup>®</sup> Management Profile

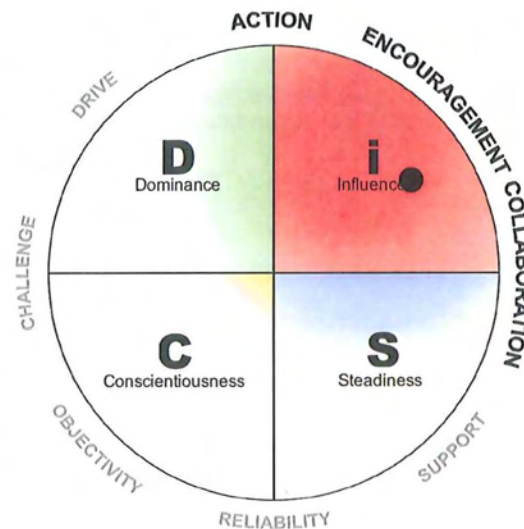
### Motivation

You can't motivate people. They have to motivate themselves. As a manager, however, you can create an environment where it's easy for people to find their own natural motivation. This means building an atmosphere that addresses people's basic needs and preferences so they can do their best work. Because of your DiSC<sup>®</sup> style, you may naturally create a certain type of environment for those around you. It's important to understand the nature of this environment because it has a major impact on the motivation of the people you manage.

Casey, because you are enthusiastic and encourage others, the environment that you help to create is one where people feel recognized and accepted. You probably help them see that work can be fun, and as a result, they may be more upbeat and optimistic about their tasks and their contributions.

In addition, your tendency to take action could help create a high-energy setting where people want to get going and keep moving. The people you manage may be inspired by your fast pace, and your emphasis on forward momentum can help instill confidence that they are going to be part of making things happen quickly.

Furthermore, your strong preference for collaboration may help strengthen the bond among team members that is often essential for reaching goals. People who feel that group efforts are appreciated are more likely to seek out opportunities to brainstorm together and improve ideas without getting caught up in who receives the most credit.



### The Environment You Create

- Because of your encouragement, people feel enthusiastic about their roles
- When you put confidence in others, they may feel empowered to use creative approaches to accomplish their goals
- Your passion and high energy may inspire people to move quickly
- Your optimism and enthusiasm can make work more fun
- When you celebrate victories, people feel more ownership in the outcomes of their work
- Because you build teams, people feel a sense of camaraderie and help each other
- Because you deliver positive feedback, people feel good about their contributions

## Motivation and the D Style

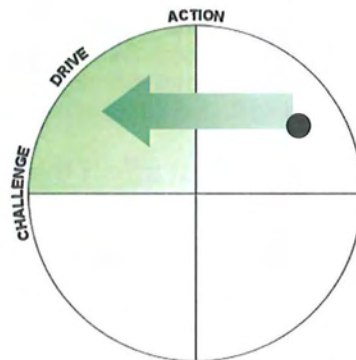
Everything DiSC® Management Profile

### How do your motivational needs compare to those of the D style?

People with the D style share your tendency to be fast-paced, but since they're motivated by achievement and career growth, their high energy is often channeled toward bottom-line results. Because they want to have power and influence, they're driven to succeed and gain the respect of others. As such, they often thrive in competitive environments and display a strong urge to win, and they show less concern for the personal connections that you value. Because they want to be in charge, they may prefer to work autonomously rather than collaboratively. These individuals want to achieve, and they often want to pursue victory on their own terms.

### What demotivates them?

- Routine
- Foot dragging
- Being under tight supervision
- Having their authority questioned or overruled
- Feeling like their time is being wasted
- Having to wade through a lot of details



### How does conflict affect the motivation of the D style?

- Employees with this style may embrace conflict as a way to create win-lose situations
- They may be energized by the competitive aspects of conflict

### How can you help create a motivating environment for the D style?

- Let them know the value they bring to the organization
- Don't overlook opportunities to allow them to work independently
- Let them control their work environment as much as possible
- Orchestrate healthy competitions that will contribute to team success
- Challenge them with concrete goals meant to stretch their abilities
- Explain the big-picture, bottom-line purpose of new projects

### What's the best way to recognize and reward the D style?

- Reward their top performances with more responsibility and autonomy
- Compliment them directly when their initiative and drive help the organization
- Give them credit for their work and ideas that lead to team success
- Offer them opportunities for advancement when they seek new challenges

## Motivation and the i Style

Everything DiSC® Management Profile

### How do your motivational needs compare to those of the i style?

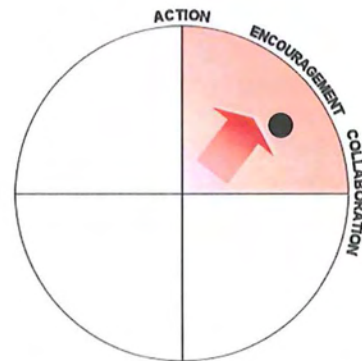
Like you, people with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. They move at a fast pace and want to collaborate with people in a fun and vibrant atmosphere. These individuals are relationship focused, and they want to stay on friendly terms with their colleagues, which is usually among your top priorities as well. They are also motivated by public recognition, and they probably appreciate the kind of warm and encouraging atmosphere you tend to create.

### What demotivates them?

- Being isolated from others
- Working in a reserved, slow-paced setting
- Having their contributions go unrecognized
- Performing routine or repetitive tasks
- Wading through a lot of details

### How does conflict affect the motivation of the i style?

- Conflict may make them emotional or angry, affecting their performances
- They may take conflict personally, which may de-energize them
- They may dwell on the conflict rather than focus on their tasks
- They may feel an overwhelming need to express themselves when very upset



### How can you help create a motivating environment for the i style?

- Let them collaborate with you and others
- Encourage their positive energy and give them opportunities to express themselves
- Limit the predictability and routine of their tasks when possible
- Reinforce their optimism with your natural enthusiasm and energy
- Give them opportunities to be in the limelight
- Provide chances to socialize without compromising results

### What's the best way to recognize and reward the i style?

- Praise them in public, and make sure the whole team knows when they've accomplished something great
- Let them know that others appreciate the energy and enthusiasm that they consistently bring to the table
- Reward them by giving them opportunities to shine in front of key players in the organization
- Recognize their contributions by recommending them for awards or advancement opportunities

## Motivation and the S Style

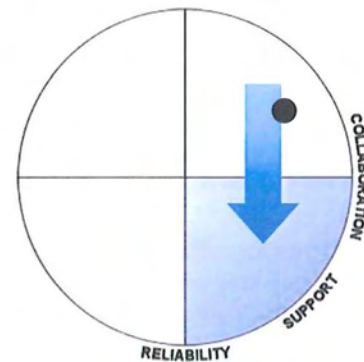
Everything DiSC® Management Profile

### How do your motivational needs compare to those of the S style?

People with the S style are motivated to create and maintain stability, so they prefer a structured atmosphere where tension and conflict are rare. They value steady progress, so while you may find a fast-paced, high-energy environment invigorating, they may find this too unpredictable. Rather, they want time to perform their duties methodically without being rushed or stressed. Because they want to make others happy, they share your interest in collaboration, although they are more likely to do this by offering behind-the-scenes assistance or supporting others. In addition, because they value harmonious personal relationships, these individuals are often diplomatic and respectful, and they're usually most comfortable working in a friendly setting.

### What demotivates them?

- Being in competitive environments
- Having to change direction abruptly
- Being rushed into quick decisions
- Dealing with cold or argumentative people
- Being forced to improvise
- Being in chaotic situations
- Having to be confrontational



### How does conflict affect the motivation of the S style?

- They may compromise on things they care about but remain frustrated beneath the surface
- They may waste energy worrying that people are mad at them
- They may become fearful about making mistakes, limiting their effectiveness or ability to take chances

### How can you help create a motivating environment for the S style?

- Avoid rushing them for results, which may require you to slow your pace at times
- Let them collaborate with others, but don't push them to be more social than they want to be
- Be clear about their tasks and responsibilities, and don't skip the specifics
- Plan ahead to be able to give plenty of warning when changes are coming
- Find ways to give them the structure and security they need to feel comfortable
- Ask for their ideas, which they might not share without encouragement

### What's the best way to recognize and reward the S style?

- Reward their steady contributions to team success by making them feel like a vital part of the team
- Give them more responsibility, and let them know that you trust them to deliver reliable results
- Offer sincere praise, but avoid putting them in the limelight
- Encourage them to consider advancement opportunities when you feel that they're ready, since they're unlikely to ask

## Motivation and the C Style

Everything DiSC® Management Profile

### How do your motivational needs compare to those of the C style?

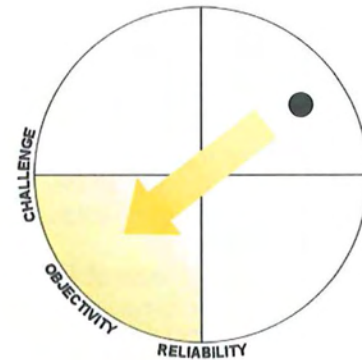
People with the C style base their decisions on logic and objective analysis, and the factors that motivate them may seem foreign to you. Keep in mind that though you favor a fast-paced, intuitive decision-making style, they may be more motivated by maintaining a moderate pace and carefully reviewing the specifics. In addition, they are comfortable working alone for long periods of time, and they appreciate having their own space in which to master their tasks. Since you tend to prioritize collaboration and group efforts, you may need to reconsider how to better motivate these individuals by providing an environment that enables them to get absorbed in analytical projects.

### What demotivates them?

- Being forced to work collaboratively too much of the time
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Getting rushed to make decisions
- Being wrong

### How does conflict affect the motivation of the C style?

- They may become resentful and unyielding, limiting their productivity
- They may withdraw from the situation to avoid dealing with emotional reactions
- Their unexpressive manner may hide a tendency to worry excessively



### How can you help create a motivating environment for the C style?

- Explain the purpose of tasks logically rather than enthusiastically
- Encourage them to help define quality standards
- Listen to their insights about projects or tasks, and avoid dominating conversations
- Provide opportunities for independent work rather than focusing on collaboration
- Convey your expectations clearly and specifically
- Give them plenty of time to process information
- Avoid springing last-minute demands on them

### What's the best way to recognize and reward the C style?

- Compliment them privately by highlighting specific aspects of their performance that stand out
- Thank them for the unique contributions they make by ensuring high-quality outcomes
- Reward them by providing new opportunities to complete challenging projects independently
- Acknowledge their growth by offering to help them build expertise in new areas of interest



## Your Approach to Developing Others

Everything DiSC® Management Profile

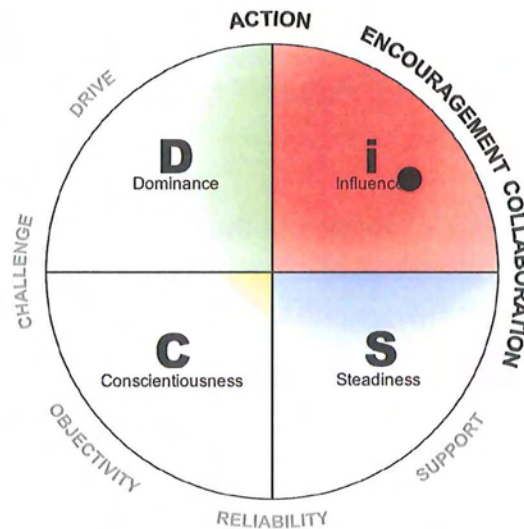
## Developing Others

One of the most important but often overlooked areas of management is employee development. By development we don't mean day-to-day direction on current job duties. Instead, we're talking about supporting people's long-term professional growth by providing resources, environments, and opportunities that capitalize on their potential.

Certainly, your employees will need to work through those limitations that are significant obstacles to their growth. Research shows, however, that you'll be most effective as a manager if you can help the people you manage identify and build on their strengths, rather than trying to fix all of their weaknesses. Each manager has a natural approach to this developing task, and your approach is described below.

Casey, you usually want the best for the people you manage, and this interest in their well-being often helps you to address their development needs. You likely are optimistic about people and encourage them to reach for their loftiest goals. You probably trust people's skills, and you tend to be upbeat and enthusiastic about their abilities even if they encounter difficulties or tough challenges.

In addition, you usually let people know that you are available to help them work toward achieving their goals, and the people you manage probably feel comfortable approaching you with their questions and concerns. Furthermore, you are likely to encourage people to take quick action and to be creative when looking at ways to use their strengths toward career growth. In essence, your tendency to collaborate with people in determining their development path can give them confidence to identify their own talents and find new opportunities to build on them.



### Advantages of Your Developing Approach

- Encouraging creative or daring ideas for people's development
- Making yourself available for mentoring
- Encouraging people to think big
- Helping people boost their self-confidence by your belief in their abilities
- Pushing people to move quickly in their development

### Disadvantages of Your Developing Approach

- Pushing people at a pace that doesn't allow them time to develop necessary skills
- Being unrealistically optimistic about some people's development options
- Failing to take a long-range view of people's development needs
- Neglecting to identify specifics about development plans
- Failing to question development plans that don't build on people's strengths

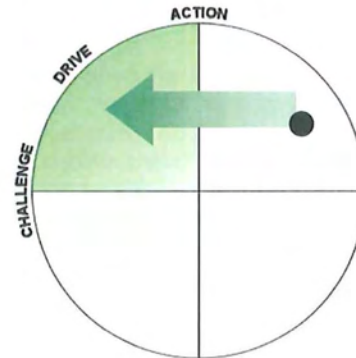
## Developing the D Style

Everything DiSC® Management Profile

### Areas where they have strong potential

Consider ways that these individuals and the organization can take full advantage of the following strengths:

- Willingness to take risks and challenge the status quo
- Comfort being in charge
- Confidence about their opinions
- Persistence through failure or tough feedback
- Competitive spirit and drive for results
- Ability to create a sense of urgency in others
- Comfort being direct or even blunt
- Restless motivation to take on new challenges
- Ability to find effective shortcuts
- Willingness to speak up about problems



### Obstacles and strategies in the development process

#### Drive

People with the D style are usually quite driven, so it may be important to ensure that their energy is channeled in the right direction. Otherwise, they may strive for their own goals and give less attention to the organization's needs. You may need to be more direct than is natural for you to rein them in and make sure their priorities align with the organization.

- Consider development opportunities that have the potential for impressive results
- Be sure that they know the difference between individual and organizational goals
- Encourage their ambition and autonomy but be prepared to redirect their focus

#### Action

Like you, people with the D style tend to move fast, so they may not believe they require any structure or long-term development plan. In your mutual zeal for rapid progress, the two of you may fail to plot out the details of their long-term growth. This is especially true if they are inexperienced or prone to make important decisions with very little information.

- Remember that they may insist on moving forward even without the necessary skill set
- Help them to slow down, if necessary, to think through their development path
- Review the big picture and encourage them to come up with appropriate goals for the long term

#### Challenge

These individuals are more independent than you, and they may be strong-willed in pursuing their goals. As such, they may challenge your authority, especially if you are focused on collaborative efforts. Give them as much autonomy as you can without undermining your own authority, but don't allow them to avoid their responsibilities to the group effort.

- Allow them to work independently to the degree that they don't damage team unity
- Reassert your authority if necessary
- Set up a system so that they know when you are suggesting and when you are telling

## Developing the i Style

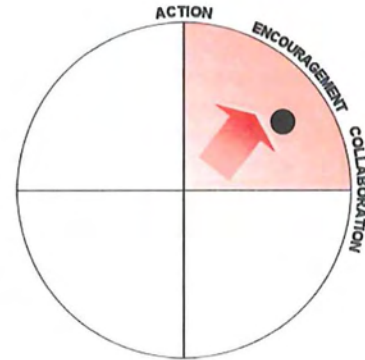
Everything DiSC® Management Profile

## Developing Others

### Areas where they have strong potential

Consider ways that these individuals and the organization can take full advantage of the following strengths:

- Ability to build a network of contacts
- Willingness to accept new ideas
- Interest in working with others
- Comfort taking the lead
- Persistence through optimism
- Tendency to create enthusiasm
- Ability to empathize with others
- Willingness to experiment with new methods
- Tendency to give open praise and encouragement to others
- Ability to rally people around an idea



### Obstacles and strategies in the development process

#### Encouragement

People with the i style want to know that they are doing a good job and are on the right development path, so they may appreciate your preference to focus on the positive while offering feedback. However, because you both tend to be optimistic, you may gloss over negative issues and ignore potential problems. As such, you may need to offer tougher feedback at times and make sure that they understand which areas need improvement.

- Continue to be optimistic when giving feedback, but don't ignore problems
- Point out if their developmental progress is hindered or colored by personal feelings
- Check to make sure they understand your feedback

#### Action

These individuals are interested in fast-paced innovation, and they may avoid development opportunities that require in-depth analysis. Because you are equally likely to push for action, the two of you may come up with development plans that are vague or overly optimistic. It may be helpful, then, to look at promising opportunities that might require more tedious or self-controlled work.

- Encourage their spontaneity when appropriate
- Point out the negative consequences when they do not take time to develop skills with deliberate effort
- Avoid letting your mutual enthusiasm obscure important details or potential issues

#### Collaboration

People with the i style tend to focus on people, and this can be a great source of strength in their development. However, because you also value collaboration above individual accomplishment, the two of you may focus exclusively on collective efforts and you may fail to push these individuals to set personal goals outside the team context. Remember that sometimes independent efforts are as important as team work when it comes to personal growth.

- Encourage them to pursue development opportunities that let them work with others
- Allow them to lead small groups
- Remind them that their growth will also depend on independent work that may seem tedious or dry

## Developing the S Style

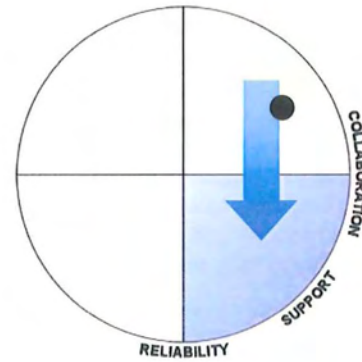
Everything DiSC® Management Profile

## Developing Others

### Areas where they have strong potential

Consider ways that these individuals and the organization can take full advantage of the following strengths:

- Ability to work with different types of people
- Interest in maintaining steady progress
- Tendency to be diplomatic
- Willingness to support team goals
- Ability to empathize with others
- Persistence to work on routine or highly detailed projects
- Tendency to follow through on commitments
- Ability to calm upset people
- Understanding of others' perspectives
- Willingness to be flexible to others' needs



### Obstacles and strategies in the development process

#### Support

People with the S style often want to be part of the team's success more than they want to achieve great personal accomplishments. Because you focus on people's emotional needs, you may allow them to stay in this comfort zone. As a result, you may enable them to avoid pushing themselves toward their own professional development.

- Help them see the depth of their skills and abilities
- Remind them that they have to focus on their own needs at times
- Push them gently to grow and develop

#### Reliability

They are dependable and stable. For this reason, they may feel that your development plans are too risky or adventurous. In addition, they may want more structure from you when it comes to laying out their professional future.

- Encourage them to look beyond the danger in bold development plans to see the opportunities
- Give them time to warm up to ideas that involve a lot of change
- Work with them to create specific development plans

#### Collaboration

People with the S style may believe that groups come up with more effective answers than individuals do, so they may rely too heavily on developmental opportunities that allow them to collaborate with people. Also, since you both want friendly, harmonious relationships, you may have trouble providing tough feedback. Trying to avoid hurting their feelings may deprive them of constructive criticism that could help them down the line.

- Encourage them to pursue opportunities that let them work with others while furthering their own development
- Show them that they have the strength to work independently and autonomously
- Offer constructive feedback when necessary

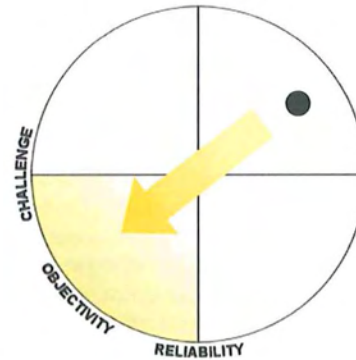
## Developing the C Style

Everything DiSC® Management Profile

### Areas where they have strong potential

Consider ways that these individuals and the organization can take full advantage of the following strengths:

- Insistence on quality
- Ability to look at ideas logically
- Comfort with studying the specifics
- Interest in maintaining error-free work
- Ability to pinpoint potential problems
- Persistence in analyzing solutions
- Willingness to work alone
- Tendency to avoid letting personal feelings interfere with work
- Ability to exercise caution and manage risks
- Interest in developing a systematic approach



### Obstacles and strategies in the development process

#### Objectivity

These individuals use logic to guide their actions, so they may believe that your more intuitive approach to development is misguided or sloppy. Because of their interest in progressing rationally, they may prefer to work in a "cave" when planning their development, and they may discount team unity and others' feelings.

- Steer them toward development opportunities that capitalize on their objective and analytical nature
- Respect their independence, but remind them of the need to fill you in on their progress
- Avoid forcing them to socialize, but reinforce the importance of teamwork

#### Reliability

People with the C style want development opportunities that are clear and well planned, and they may reject your tendency to keep moving forward and work out the specifics later. They may also become inflexible once they've decided on a logical course of action. Further, they may be less interested in your daring or innovative ideas for development, even though playing it safe isn't likely to lead to growth.

- As much as possible, put development opportunities into a clear, well-organized framework
- Encourage them to look beyond safe and predictable development plans
- Refrain from letting them get bogged down in the details

#### Challenge

These individuals are often skeptical, so they may probe ideas for flaws even after others have accepted them. Their tendency to question solutions may be frustrating as you work with them to create a development path.

Their tendency to say, "no" may come across as dismissive or resistant.

- Back up your development ideas with objective rationales to increase the likelihood of buy-in
- Hold them accountable if they question your ideas in a combative or disrespectful way
- Remind them that the energy they spend resisting you could be better spent brainstorming mutually agreeable development ideas

## How Your Manager Sees You

Everything DiSC® Management Profile

## Working with Your Manager

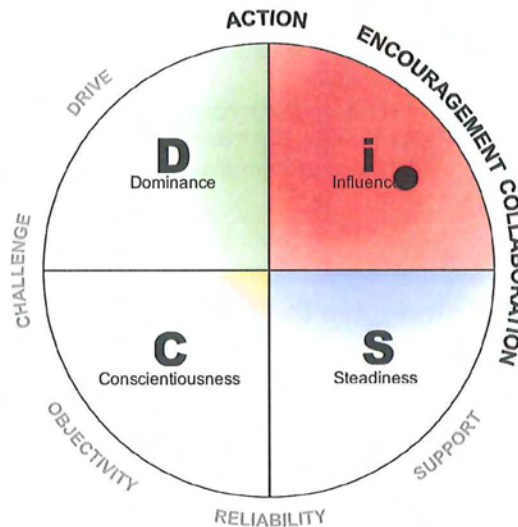
One of the most important but often overlooked aspects of management is sometimes called “managing up.” This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. Most of the time, our tendencies come so naturally to us that we don't realize how we come across to others. This page provides insight into how your manager might see you.

### Encouraging

Casey, because of your *i* style, you probably come across as enthusiastic and people-oriented. Your manager may appreciate your tendency to inspire people to keep a positive outlook. On the other hand, because you're sometimes overly optimistic about others' abilities, your manager may be concerned that you let your emotions cloud your judgment. In addition, some managers who focus on concrete results may be less impressed with your emphasis on a lively work environment.

Consider that

- Your manager may want you to direct more effort toward the bottom line
- Some managers are more concerned with objectivity than passion



### Active

Many managers will appreciate that you get going quickly on tasks and projects. Furthermore, they may like how your energetic push toward new opportunities gives the organization momentum. On the other hand, managers who prefer a more systematic and careful approach may see your speed as sloppy or reckless. Your spontaneous style could make them believe that you're more interested in excitement than quality.

Consider that

- Your manager may want you to take more time to analyze options
- Some managers may find your more adventurous ideas to be impractical or unrealistic

### Collaborative

Because of your emphasis on teamwork, your manager probably feels comfortable that you'll gather a lot of input to create stronger solutions. Many managers may also appreciate your openness to ideas even if they didn't originate with you. However, your consistently collaborative approach may make some managers think that you're more interested in the group process than in getting things done. Also, managers with more of a task focus might believe that you spend too much time socializing and considering tangential ideas.

Consider that:

- Your manager may think that you have trouble staying on task
- Managers who stress independent work may want you to act decisively without involving others

## Working with “D” Managers

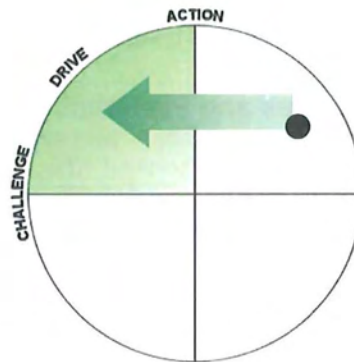
Everything DiSC® Management Profile

Most of us would like to understand our own manager a bit better. And if your manager tends toward D, here are some insights for working more effectively together.

### Their Priorities and Preferences

Managers with the D style put a strong emphasis on drive and challenge, so they focus on bottom-line results. They tend to have a competitive nature and will do what it takes to win. Like you, they prioritize action, and they probably get restless when things move at a slow, steady pace. At the same time, they may fear being taken advantage of, so they will work hard to maintain control of their environment. Overall, they seek achievement, and they respond best to people who can quickly help them reach their goals.

## Working with Your Manager



### Advocating and Getting Buy-In

Managers with the D style want to see concrete results as fast as possible, so you may get buy-in by showing how your plan will quickly affect the bottom line. They respect confidence, so use your natural self-assurance to help your ideas get serious consideration. However, they are particularly sensitive to being manipulated, so if you present your ideas enthusiastically without showing them the substance of your plan, these managers may dismiss it as frivolous. If you want their attention, lay out the big picture simply and directly. Avoid unnecessary details, but be ready with facts in case they challenge your assumptions. In addition, keep in mind their need to feel in control. Managers with the D style may dismiss an idea if they believe that you ignored their advice or sidestepped their authority. Therefore, be sure to show respect for their leadership, and offer them an ownership stake or author role in the solution.

- Keep the focus on the bottom line
- Project confidence in your ideas, but only when it's genuine
- Avoid coming across as overly enthusiastic or passionate

### Dealing with Conflict

Managers with the D style can become competitive in conflict, creating win-lose scenarios in which compromise is seen as a sign of weakness. They aren't inclined to gloss over differences or avoid confrontation. This is probably quite a bit different than how you handle conflict, since you prioritize friendly relationships. When working with these managers, be careful not to brush past the issues. They're likely to be more blunt than is comfortable for you, but remember not to take it personally. Try to state your points objectively without getting defensive or lashing out.

- Avoid viewing their directness as a personal attack
- Don't gloss over disagreements just to keep everyone friendly
- Keep the discussion focused on the issue at hand rather than veering off into other areas of discontent

## Working with “i” Managers

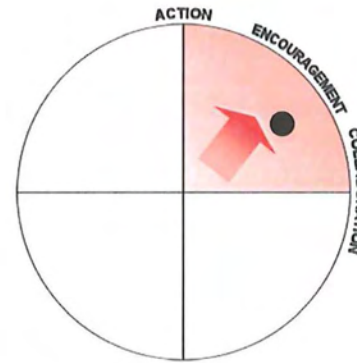
Everything DiSC® Management Profile

Most of us would like to understand our own manager a bit better. And if your manager tends toward i, here are some insights for working more effectively together.

### Their Priorities and Preferences

Managers with the i style share your strong emphasis on encouragement and collaboration. They probably prefer to work with others, and they may appreciate that you put a similar priority on teamwork and encouraging others to achieve their best. They like a warm and enthusiastic environment, and because of their focus on action, they may become bored or frustrated if things slow down too much. Also, because they care what people think of them, they may fear loss of popularity or social standing. Overall, they want to lead a fast-paced but friendly team, and they respond best to people who share their optimistic team spirit.

## Working with Your Manager



### Advocating and Getting Buy-In

Managers with the i style look for enthusiasm, and they want to know how your plans will affect other people. They want to feel excited about new proposals, so they probably appreciate your passion for your ideas. To gain their buy-in, show them how the team can work together to reach your goals. Use your energetic approach to show them that your solution has the power to invigorate people. Because they are likely to catch your contagious enthusiasm, don't be afraid to show excitement about your plan's potential. At the same time, however, avoid exaggerated claims that might mask legitimate flaws. Lay out the big picture, and assure them that things can happen quickly.

- Let your enthusiasm and passion show
- Discuss the effect of your ideas on other people
- Refrain from getting so caught up in mutual optimism that both of you overestimate the idea's true potential

### Dealing with Conflict

Managers with the i style want to maintain friendly relationships. However, self-expression is very important to them, so in a conflict situation, they may demand to be heard. As a result, when they are forced into a confrontation, they may become emotional and lash out at others. Because you are similar in your approach, you and an “i” manager may say harsh things to one another that are difficult to take back. This is unfortunate, because both of you may have trouble letting things go later. When working with them, be careful to avoid personal attacks. Express your concern for their feelings and a desire to work through the conflict quickly but thoroughly. Let them know that a disagreement now doesn't mean a poor relationship down the road.

- Avoid engaging in any personal attacks
- Acknowledge the importance of everyone's feelings
- Make it clear that your relationship is still strong even after tough confrontations



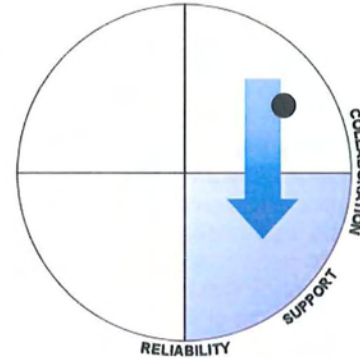
## Working with “S” Managers

Everything DiSC® Management Profile

Most of us would like to understand our own manager a bit better. And if your manager tends toward S, here are some insights for working more effectively together.

### Their Priorities and Preferences

Managers with the S style put a strong emphasis on reliability and support, and they want to create a stable and friendly culture. They may particularly avoid the fast-paced and sometimes energetic environments that you prefer, since this doesn't allow them to provide the security they value. Like you, they prioritize collaboration, and they want people to work together harmoniously. They like to work systematically, and they may fear rapid change or high-pressure situations. Overall, they want to lead a team in a calm setting where tension is rare, and they respond best to people who are friendly team players.



### Advocating and Getting Buy-In

Managers with the S style want to see how your ideas can contribute to team unity and reliable results. They are less spontaneous than you tend to be, so they need time to prepare for any major changes that you want to suggest. While they may allow you to lead the discussion, remember that excessive enthusiasm is unlikely to help you get their buy-in. Because they often weigh both sides of a decision, they may want more time to consider your proposal. If you want their attention, present your ideas as clearly and methodically as you can, and be ready with details to answer their concerns. Ask them for feedback on your proposals, and let them know that you value their opinion. Point out how aspects of your solution can have a positive impact on people. If the plan feels too disorganized, they're not likely to provide the support you need to make it happen.

- Refrain from overwhelming them with your enthusiasm
- Lay out your plan in a step-by-step manner
- Emphasize how your idea helps people

### Dealing with Conflict

Managers with the S style want to avoid conflict whenever possible, so they may gloss over differences or even deny that there is a problem. Because you also tend to dislike addressing issues head-on, you may need to take a more direct approach to resolve disagreements. Don't assume that their silence means that the matter is resolved. Express your concern for their feelings and a desire to work through the conflict quickly but thoroughly. If you allow them to bury their feelings, the resentment may build.

- Address the situation directly rather than masking your differences
- Be careful not to lash out in anger, since they will likely take it personally
- Follow up to make sure that the issue is resolved

## Working with “C” Managers

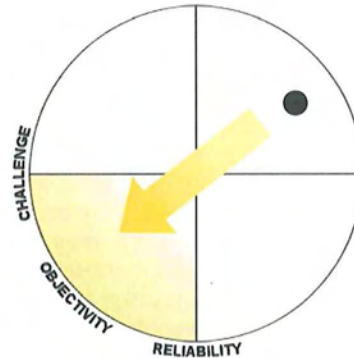
Everything DiSC® Management Profile

Most of us would like to understand our own manager a bit better. And if your manager tends toward C, here are some insights for working more effectively together.

### Their Priorities and Preferences

Managers with the C style put a strong emphasis on objectivity and reliability, and they want to create a logical and businesslike culture. They may particularly dislike the fast-paced, energetic environment that you prefer, since it may not allow them to provide the consistently high-quality results they value. Because of their challenging nature, they aren't afraid to show skepticism for excessive enthusiasm or ideas that aren't backed up by facts. Because they're so focused on accuracy, they may spend a lot of time performing in-depth analysis. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

## Working with Your Manager



### Advocating and Getting Buy-In

Managers with the C style want to see how your ideas can lead to a high-quality solution. Because they want to anticipate potential issues or complications, they're likely to ask a lot of questions. For this reason, your big-picture may fail to get their buy-in. If you want them to act, provide the facts and data to prove that your plan is the best one. They're more interested in accuracy than speed, so you may need to slow down and show them that you've thought through all of the consequences. When you want their attention, present your ideas clearly and systematically, and be ready with the evidence that they need. They're unlikely to respond well to overly enthusiastic presentations, so don't rely on your excitement. If you come across as too passionate, in fact, they're more likely to view your efforts as sloppy or manipulative. By giving them the information that they want and the time to process it, you will be much more likely to get them on your side.

- Lay out your plan clearly and avoid glossing over the specifics
- Be ready to provide all the information they need to reach a decision
- Refrain from overwhelming them with your enthusiasm

### Dealing with Conflict

Managers with the C style often try to overpower people with logic when in conflict. Because they view conflict as a disagreement over who is correct, they may avoid direct aggression and remain objective. If emotions begin to run high, however, they may begin to withdraw or refuse to discuss it any more. You may also gloss over differences, but when forced to confront the situation you may become emotional or lash out. In such cases, they may not understand your need to express yourself. Therefore, you may need to focus more on facts to make sure that you hear their side of the story. Don't insist on immediate resolution, since they may need time to process. State your position factually and objectively and give them time to state their side.

- Support your opinions with logic and facts
- Refrain from making emotional appeals that might cause them to withdraw
- Give them space to process before confronting the issues