



**David Gomez & Associates Inc.**  
Executive Search & Management Consultants

**David Gomez & Associates, Inc.**

**1400 16<sup>th</sup> Street**

**Suite 200**

**Oak Brook, IL 60523**

## **EXECUTIVE SEARCH PROPOSAL**

**City of Gunnison, Colorado – City Manager**



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**PREPARED FOR**

**City of Gunnison, Colorado**

**February 3, 2016**



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## Welcome to DG&A

February 3, 2016

Mayor and City Council City of Gunnison  
201 West Virginia Avenue  
P.O. Box 239  
Gunnison, CO 81230  
City Manager Recruitment  
Attn.: Gail Davidson, City Clerk

Dear Mayor & City Council,

David Gomez & Associates, Inc. (hereinafter referred to as DG&A) is proposing to assist the City of Gunnison (hereinafter referred to as CITY OF GUNNISON) to recruit and hire City Manager.

Our team will find only the most exceptional candidates: Ideal candidates will assume full responsibility for planning, administering, directing, overseeing, and evaluating the activities and operations of the City of Gunnison including public safety, community development, administrative services, operations and maintenance, parks, recreation, facilities, and administration; provides policy guidance to and coordinates the activities of management staff; facilitates the development and implementation of long and short range plans, policies, goals, objectives, and programs to provide the City with technical and Administrative direction in meeting and maintaining City services standards; ensures public services are delivered in an efficient and effective manner; and provides highly complex administrative support to the City Council including implementing policy decisions made by the City Council. DG&A will achieve this objective for the CITY OF GUNNISON by executing the following services:

- ✦ Conduct meetings with the CITY OF GUNNISON's Mayor & City Council & search team to determine their vision for, expectations of, and commitment to the recruiting efforts.
- ✦ Develop or improve upon a job description that ensures proper priority is given to the candidate's specific responsibilities, skills, and education requirements.
- ✦ Develop a consistent, customized set of candidate assessment criteria to be used by DG&A recruiters.
- ✦ Identify a target market for pursuing candidates with the appropriate skill mix and educational background.
- ✦ Conduct candidate screening, behavioral interviews, reference and background checks, and leadership, talent, and cultural analysis.
- ✦ Present detailed interview results on each candidate to narrow the field to the top finalists.
- ✦ Assist in determining job offers, including salary negotiations, benefits, and commencement dates.
- ✦ Monitor the transition of candidates into their new position to ensure satisfaction has been achieved.

As a certified Hispanic Business Enterprise, DG&A is one of the fastest-growing MBE retained executive search firms in the United States. We recognize the value of inclusivity in executive searches and strive to present a comprehensive slate of top professionals who reflect that mindset. We designed and utilize an inclusive methodology that enables us to provide the top talent in the Executive Search industry.

Our boutique status allows us to extend the resources necessary to give a personal touch to each and every client. By choosing DG&A as your search partner, we engage a team of professionals whose sole job is to execute this contract.

Thank you for the opportunity to serve; we would be honored to become your search partner for this upcoming project.

Best Regards,

David P. Gomez, President & CEO  
David Gomez & Associates, Inc.



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## City Manager, Functions and Duties

**The City Manager shall be the chief administrative officer of the City.** He shall be held responsible to the City Council for the following functions and duties, any of which may be delegated at his discretion:

- ✦ For the efficient administration of all administrative departments of the City;
- ✦ To see that all laws and ordinances are enforced;
- ✦ To appoint the heads of the several City departments whose appointment is not otherwise specified in this Charter, and to direct and supervise such department heads;
- ✦ To give to the proper department or officials ample notice of the expiration or termination of any franchise, contracts or agreements;
- ✦ To see that all terms and conditions imposed in favor of the city or any of its inhabitants in any public utility franchise, or in any contract, are faithfully kept and performed;
- ✦ To recommend an annual budget to the Council and to administer the budget as finally adopted under the policies formulated by the Council, and to keep the Council fully advised at all times as to the financial conditions of the City;
- ✦ To recommend to the Council for adoption such measures as he may deem necessary or expedient; and to attend Council meetings with the right to take part in discussions but not to vote;
- ✦ To exercise and perform all administrative functions of the city that are not imposed by this Charter or ordinance upon some other official;
- ✦ To be responsible for the maintenance of a system of accounts of the city which shall conform to generally accepted principles and procedures of governmental accounting. He shall submit financial statements to the Council quarterly, or more often as the Council directs;
- ✦ To act as Purchasing Agent for the city and in such capacity to purchase all supplies and equipment and dispose of same in accordance with procedures established by the Council;
- ✦ To establish, subject to approval by the Council, appropriate personnel rules and regulations governing officers and employees of the City;
- ✦ To perform such other duties as may be prescribed by this Charter or required of him by ordinance or by direction of the Council.



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## Due Diligence – Understanding City of Gunnison Needs

Through our in-depth due diligence meetings with select stakeholders at the CITY OF GUNNISON, we will want to learn more about the points below. We will take your lead regarding the specific individuals who will be involved in up-front due diligence discussions.

- ✦ Each key business and functional area in the organization – what is working effectively and what might require more attention for the candidate to continue ongoing improvement.
- ✦ The history, current dynamics, and future plans for the CITY OF GUNNISON and other key strategies.
- ✦ The right skill set needed in CITY OF GUNNISON’s future hired candidate given current initiatives and future strategic plans.
- ✦ Your preferred search process. (Please see Search Process in the following section that we will want to review with you in detail during our early meetings.)
- ✦ The expected compensation factors, including the relocation assistance that can be a critical contributor to closing a search in light of today’s real estate dynamics.

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## History of Gunnison

The town of Gunnison got its name from the first known explorer of the area, John W. Gunnison. He was searching for a route for the transcontinental railroad in 1853 and only stayed for three days before traveling west to Utah. Gunnison saw its first population increase in the 1870s, due to the mining surge throughout the state. The railroad arrived soon after in 1880 to appreciative miners, ranchers, and farmers.

In the early 1800s, the groups moving into the Gunnison area were mainly fur trappers and mountain men, trying to make a living for themselves in the rocky mountain terrain. But a drop in fur prices in the 1840s essentially cut out the need for their jobs.

The late 1850s saw the start of people joining the hunt for gold in Gunnison County. Miners were in search of placer gold, but with the growing numbers of white men in the area, this brought conflict between the Ute tribes still around the county. At least several miners were killed by these tribes and this caused some of the miners to flee the area, caring more for their lives than potential gold bonanzas.

With the mining boom, Gunnison began to see an increase of people around the 1870s. Along with the miners coming in, ranchers and farmers were among the others that lead to the Ute people becoming forced out of the area. The mining camps in Gunnison and around the county reportedly produced about 130,000 ounces of gold from the beginning of the gold rush through 1959. At the start this was mostly from placer deposits, but the largest amounts were from a by-product of silver-lead ore. The largest deposits were found along the Taylor River, as well as the Tincup and the Washington Gulch districts.

Before the railroad reached Gunnison in 1880, there was a debate as to which railroad line would claim the town as their territory. The D&RG and DSP&P were both battling for control over the area. This split the town into two sides, both disagreeing as to where the railroad depots should be placed in town. The "old" and "new" sides of town ended up agreeing to disagree and were happy to have any railroad come through town. Both lines ended up coming through town anyway, although the DSP&P shortly discontinued service to Gunnison. The D&RGW railway also was a prominent line to Gunnison for about seventy years and served as the primary means of transportation for the townspeople.

Also in 1880, the cattle industry in Gunnison was established. Realizing the poor conditions for farming (with only about eleven inches of rainfall annually and the short growing season due to the high elevation and alpine environment) the local farmers turned to ranching and began breeding cattle. To do this effectively, they had to clear and level fields for grazing purposes. Irrigation ditches also had to be cut into the ground to properly irrigate the fields in order to grow hay for the horses and cattle. Many of these practices are still in use, which can be seen while driving through and around the town to the various ranches that are still in operation.



## Company Profile



Headquartered in Chicago since 1978, **David Gomez & Associates, Inc. (DG&A)** is a retained executive search firm with clients spanning multiple industries across the United States. DG&A offers expert executive search services and human capital consulting (including diversity and succession planning). Through our unique, proprietary search process, we deliver only the most exceptional executive and managerial candidates: business leaders adept at navigating the complexities inherent to the global economy. As a **Hispanic Business Enterprise**, we are especially mindful of the value of diversity for an organization's vitality, creativity, and success. DG&A recruits the highest quality executive-level candidates in the market to meet the demands of our clients' leadership structure.

Having developed and refined our proprietary search process since our inception over thirty years ago, we retain our edge by consistently uncovering high-performance professionals to meet your organizational needs. We conduct business with integrity, building lasting partnerships that benefit the companies, communities, and individuals we serve.

### SCOPE OF SERVICES

**EXECUTIVE SEARCH:** An organization's talent management is its single best sustainable competitive advantage. Using our proprietary database and expert sourcing and research strategies, we provide an accurate assessment of the available talent for a particular role, industry, and location. **The Result: Our recruiting efforts fit seamlessly with our client's internal processes and align with their organizational strategies.**

**HUMAN CAPITAL & DIVERSITY INCLUSION CONSULTING:** DG&A provides a broad range of consulting solutions that are instrumental to enhancing our clients' recruiting strategies. We provide Diversity Consulting which focuses on providing minority leadership to your organization, Team Talent Analysis which measures the effectiveness of your current talent pool, and an organizational culture analysis which ensures the appropriate candidate-client fit. **The Result: DG&A finds solutions to our client's human capital needs.**

**BOARD PLACEMENT:** DG&A assists our clients in building powerful, experienced and diverse boards. DG&A provides a full range of Board Placement services including appointing non-executive chairmen; advising on board succession and corporate governance issues; and offering behavioral & cultural board assessment services. **The Result: With our proprietary database and inclusive methodology, we place qualified individuals who add value to the boards they join.**

**EXECUTIVE CAREER & LIFE COACHING:** With over 36 years of experience, David Gomez, the award-winning founder, CEO, and President of David Gomez & Associates, Inc. is passionate about cultivating talent and helping our candidates identify and achieve their career and life goals. DG&A offers one-on-one executive career & life coaching, resume rewrites, LinkedIn profile updates, and cover letter rewrites. **The Result: David and our Senior Career Coaching Consultants assist our clients with moving toward a greater level of career fulfillment and personal success.**

#### CORPORATE OFFICE

1400 16<sup>th</sup> Street  
Suite 200  
Oak Brook, IL 60523

#### REGIONAL OFFICE

5501 Lyndon B Johnson Freeway  
Suite 600  
Dallas, TX 75240

## Diversity Expertise & Inclusive Methodology Consulting

### DIVERSITY EXPERTISE

Since 1978, **DG&A has successfully completed more than 650 diversity-related executive searches** for our clients in a wide range of industries, including healthcare, government, consumer goods, nonprofit, education, and financial services.

### DG&A INCLUSIVE METHODOLOGY



As a **certified Hispanic & Minority Business Enterprise**, DG&A recognizes the value of inclusivity in executive searches and strives to present a comprehensive slate of top professionals who reflect that mindset. We provide the best and brightest candidates first and foremost while utilizing an inclusive methodology.

Using our proprietary database and expert sourcing and research strategies, we provide an accurate assessment of the available talent for a particular role and location. To that end, we make sure that our recruiting efforts fit seamlessly with our client's internal processes and align with their organizational strategies.

### SUBJECT-MATTER EXPERTS

While recognized for transforming DG&A into an **Inc. 500 Fastest Growing Company**, President/CEO David Gomez's expertise in diversity consulting also earned him a consistent and prominent presence in the pages of national and trade publications including the Wall Street Journal as well as *Latino Leaders* and *Dinero* magazines. He was selected as the United States Hispanic Chamber of Commerce's (USHCC) Convention Chair for the September 2013 Annual National Convention in Chicago after serving as the USHCC's Finance Chair, Nominations Chair, and on their Executive Committee. Gomez was appointed to the Board of the Directors for the USHCC after identifying its CEO, Javier Palomarez. David also assisted in the formation of the New America Alliance (NAA), an organization of Latino business leaders.

As the Corporate Board Chairman of the NAA, Gomez crafted the joint venture between Hispanic Association on Corporate Responsibility (HACR) and NAA in order to create the first Board of Directors Program at the University of Southern California's Marshall School of Business as well as Harvard Business School's first Best Practices in Corporate Governance curriculum.

David's professional contributions have earned him accolades, including *Minorities in Business* magazine's "Entrepreneurial Spirit Award" and *Hispanic Business* magazine's "Corporate Elite." Gomez is a sought-after speaker, bringing his entrepreneurial and industry insight to audiences, including the National Society of Hispanic MBAs and the National Black MBA Association.

Over the past 20+ years, DG&A's recruiting team has developed a deep understanding of how to successfully utilize an inclusive methodology in order to recruit a diverse slate of candidates. Our consultants utilize their expertise on our client's goals and the individual candidates to find qualified professionals who reflect a client's fit for industry experience, certifications required, and multicultural background.

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## The DG&A Team



**DAVID GOMEZ, CHIEF EXECUTIVE OFFICER**

Office: (630) 686-1410

[dgomez@dgai.com](mailto:dgomez@dgai.com)

David Gomez has been in Executive Search for over 30 years. He had driven DGA to INC. 500 fastest growing status as well as built two other businesses during his career. As CEO of DGA he has been called upon by his clients to help them locate senior talent to help navigate through our changing economy. Most recently he has been applauded by the search community for spearheading an Inclusive Methodology that has been recognized as best in class. He is also on the Executive Committee of the United States Hispanic Chamber of Commerce and one of his first assignments was to locate their new CEO. Since joining the board the USHCC has celebrated 5 years of unprecedented growth. David takes pride in his work and his family. Married for forty years with six children and sixteen grandchildren, he is a pillar in the Community of Chicago. He has attended Harvard, University of Southern California and University of Chicago business schools pertaining to Board placement.



**CHRISTOPHER GOMEZ, PARTNER**

Office: (630) 686-1414

[cgomez@dgai.com](mailto:cgomez@dgai.com)

Christopher Gomez has eight years of experience across research, recruiting, and business development roles at David Gomez & Associates. In his time at DG&A, Christopher has established strategic relationships with the nation's leading companies, providing them with the talent critical to continued business success. Chris is focused on delivering superior retained executive search and human capital consulting within public and private sectors. He is devoted to ensuring client satisfaction and is dedicated to an interactive candidate experience.

As Vice President and a Partner, Christopher is responsible for new business development and search execution across multiple industries and functional verticals. He is a sales & marketing operative expert for the organization with a secondary emphasis in recruitment execution, where he works to build teams of people that add value to client's organizations. Previously the Vice President of Talent Acquisition, Christopher has managed the full cycle of search processes, which includes assessments and negotiations for executive projects, client communication, strategy development, research, and interviews. Christopher earned his Bachelor's degree from University of Illinois and a Master of Business Administration degree from DePaul University.



**DR. DAWN LEHMAN, VICE PRESIDENT OF STRATEGY**

Office: (312) 279-2017

[dlehman@dgai.com](mailto:dlehman@dgai.com)

Dr. Lehman is a Vice President with the firm. She holds a B.A. degree in communications and M.A. and Ph.D. degrees in medical anthropology. Dawn has conducted multidisciplinary research and developed train-the-trainer programs to help organizations identify and address workforce issues associated with employee wellness, aging, and family caregiving responsibilities and needs. She has designed cultural competency training and professional development programming for healthcare workers, and her research has led to health promotion campaigns in communities. Dawn will conduct organizational culture assessments to help our clients articulate their employee value proposition to hard-to-hire candidates and conduct candidate assessments including MBTI Instrument), as well as interview final candidates and provides candidate recommendations.



**LINDA CATLIN, LICENSED CULTURAL ANTHROPOLOGIST**

Office: (312) 346-5525

[lcatin@dgai.com](mailto:lcatin@dgai.com)

Linda Catlin has over 30 years of experience in organizational change dynamics, evaluation, management training, and educational administration. Her management experience includes positions as Associate Dean of Instruction at the Dallas County Community College District and Administrative Director for the Biochemistry Department at Southwestern Medical School/University of Texas Health Science Center. She also was the Management Training Director at Shepard's/McGraw-Hill. Since 1992 she has been an Independent Consultant working with organizations in Healthcare, the Nonprofit Sector, and Private Industry.

Linda will conduct organizational culture assessments to help our clients articulate their employee value proposition to hard-to-hire candidates and conduct candidate assessments as well as interview final candidates and provides candidate recommendations.



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## Client References

### **Councilman Reverend Ricky V. Burgess, Chair - Board of Commissioners**

#### *Housing Authority of the City of Pittsburgh*

Phone: (412) 255-2137

Email: [ricky.burgess@city.pittsburgh.pa.us](mailto:ricky.burgess@city.pittsburgh.pa.us)

Services: Full Life Cycle Executive Search

Positions: Executive Director, Chief Operations Officer, General Counsel, Director of Human Resources, Director of Section 8 Housing

### **Caster Binion, Chief Executive Officer**

#### *Housing Authority of the City of Pittsburgh*

Phone: (412) 456-5012

Email: [caster.binion@hacp.org](mailto:caster.binion@hacp.org)

Services: Full Life Cycle Executive Search

Positions: Executive Director, Chief Operations Officer, General Counsel, Director of Human Resources, Director of Section 8 Housing

### **Marilyn D. Jefferson, Vice President of Organizational Effectiveness**

#### *Chicago Housing Authority*

Phone: (312) 913-7718

Email: [mjeffers@thecha.org](mailto:mjeffers@thecha.org)

Services: Full Life Cycle Executive Search

Positions: Chief Housing Officer, Chief Financial Officer, Executive Vice President of Development, Budget Director

### **Dan Ferris, Senior Vice President & CFO, Finance**

#### **Ruth Santiago, Vice President of Human Resources**

##### *Port San Antonio*

Dan Ferris (210) 439-4907

[dan.ferris@portsanantonio.us](mailto:dan.ferris@portsanantonio.us)

Ruth Santiago (210) 383-5759

[ruth.santiago@portsanantonio.us](mailto:ruth.santiago@portsanantonio.us)

Services: Full Life Cycle Executive Search

Position: Vice President of Real Estate Management, Chief Building Official, General Manager, Railport

### **Eileen Timmins, PH.D., Chief Human Resources Officer**

#### *Muscular Dystrophy Association*

Phone: (312) 260-5915

Email: [etimmins@mdausa.org](mailto:etimmins@mdausa.org)

Services: Full Life Cycle Executive Search

Positions: Chief Information Officer, Vice President of Fund Raising, Vice President of Human Resources

### **Paula Blacklock, Search Committee Chair**

#### *Workforce Solutions Alamo*

Phone: (210) 414-8725

Email: [paula@salighthouse.org](mailto:paula@salighthouse.org)

Services: Full Life Cycle Executive Search

Position: Executive Director



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## Representative Sampling of Governmental & Public-Sector Searches

### Non Profit

**Ada S. McKinley Community Services, Inc.**  
*Chief Executive Officer*

**Aunt Martha's**  
*Chief Medical Officer*

**Chicago Family Health Center**  
*Chief Executive Officer, Chief Operating Officer,  
Chief Financial Officer, Sr. Director of HR*

**Chicago Health Systems**  
*Chief Executive Officer*

**Cook County Health & Hospitals System**  
*Director of Business Development  
Public Relations & Community Affairs*

**Gads Hill Center**  
*Chief Executive Officer*

**La Causa Charter School**  
*Chief Executive Officer*

**City Colleges of Chicago**  
*Master Services Agreement for Executive Search Services  
Chief Financial Officer*

**Metro South Medical Center**  
*Chief Financial Officer*

**Norwegian American Hospital**  
*Chief Financial Officer, Director of Quality*

**United Neighborhood Organizations**  
*Chief Executive Officer*

### Government

**Chicago Minority Supplier Development**  
*Senior Fundraising & Business Development*

**Community and Economic Development  
of Cook County, Inc.**  
*Chief Executive Officer*

**Dallas/Fort Worth International Airport**  
*Vice President of Human Resources*

**Housing Authority of the City of Pittsburgh**  
*Executive Director, General Council Director of HR  
Chief Operating Officer*

**MetroSouth Medical Center**  
*Chief Financial Officer*

**Port San Antonio**  
*Certified Chief Building Officer  
Vice President of Real Estate Management  
General Manager of Eas6t Kelly Railport*

**Society of Hispanic Engineers**  
*Chief Executive Officer*

**The Public Health Institute of Metropolitan**  
*Communications Manager*

**United States Hispanic Chamber of**  
*Chief Executive Officer  
Board Directors*

**Chicago Housing Authority**  
*Chief Housing Officer, Executive Vice President  
Chief Financial Officer  
Budget Director*

**Richmond Housing Authority**  
*Chief Operating Officer*



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## Case Study

### HOUSING AUTHORITY OF THE CITY OF PITTSBURGH: EXECUTIVE DIRECTOR

*Below is an example of an Executive Director search DG&A conducted for the Housing Authority of the City of Pittsburgh. We have highlighted our client's challenge, DG&A's actions, and the results of the search. The HACP was so impressed with our work that they retained us once again to fill their Chief Operating Officer role.*

#### CHALLENGE

The Housing Authority of the City of Pittsburgh retained us to help them find an Executive Director that would be responsible for all aspects of the housing authority's operations including administration, management, development, and financial control. The Executive Director would guide the agency in the operations and administration of the various housing programs. Crucial to this role was the ability to ensure the agency maintains a high level of visibility within the community and will serve as a housing advocate for those in need. The Authority is governed by a board of Directors, which establishes goals, approves policy and budgets, and provides general direction to the Executive Staff.

#### ACTION

We met with the client to identify the core competencies for the position. Our team benefited from having the preliminary search discussion with senior leadership as well as the Board of Directors that had to give their approval in the final hiring decision. From these discussions, it became clear that the company was after a certain profile: Candidates with effective communication skills, experienced in leadership and management. The ideal candidate would have organizational development skills and experience working with programs.

#### RESULTS

**In less than 45 days, our team was able to contact over 200 qualified candidates.** The individuals presented all exhibited a track record of exceptional leadership, commitment, effective communication skills, and were responsive and accountable. The selected individual had over 20 years of progressive experience in the field of housing and community development. This candidate had excellent management, supervisory, leadership, resource development, and program and organizational development skills. They also had excellent problem solving and program assessment ability as well as the capability to problem solve, formulate policy, and respond with an effective plan of action in problematic circumstances, including when presented with adversarial situations.



Sample Work Plan



David Gomez & Associates Inc.  
Executive Search & Management Consultants

# Richmond Redevelopment & Housing Authority

Chief Operations Officer



By: David Gomez & Associates

SAMPLE

January 22, 2016



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SAMPLE



## Richmond Redevelopment & Housing Authority's Needs Assessment According to David Gomez & Associates

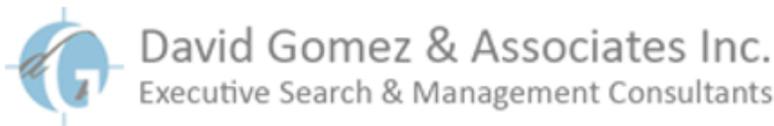
**POSITION:** Chief Operations Officer

**SUMMARY:** David Gomez & Associates, Inc. (DG&A) understands that Richmond Redevelopment & Housing Authority (RRHA) is looking for a Chief Operations Officer with experience planning, developing and managing all day-to-day operations of a housing authority, with a demonstrated passion for breaking new ground to lead change, and a demonstrated ability to both lead and build the capabilities of a driven, bright, diverse team.

**INITIAL CONSULTATION:** Based on the information gathered from the discovery discussion/kickoff meeting held on November 18, 2014 by phone between [REDACTED] Millena Sanchez, Jason Keenan, David Gomez and Kristie Sams. DG&A is building the framework for a successful search. The team provided the following information regarding RRHA's operations and objectives, culture, and the technical requirements of the role. We also discussed the dimensions for job success, specific experience, competencies, knowledge, and personal characteristics required to build a thorough candidate pipeline for RRHA's next Chief Operations Officer.

- **STRUCTURE:** The Chief Operations Officer reports to the Chief Executive Officer at RRHA. RRHA serves nearly 10,000 residents in approximately 4,100 public housing units, and an additional 3,000 families through the Housing Choice Voucher Program, throughout the Richmond area. DG&A's job is to sell candidates on the opportunity to effect positive change on the families in these facilities by overseeing the functional operations of these programs and facilities.
- **COMPENSATION PACKAGE:** RRHA offers a highly competitive comprehensive compensation package.
  - *Base:* \$100K – \$125K
  - *Bonus:* Potential \$5K sign on bonus and annual merit pay
  - *Relocation:* Transfer of household goods
- **IDENTIFYING A TARGET MARKET:** DG&A's recruiting efforts will be focused on candidates with experience in Housing Authorities located within the Northeast Region of the United States, and then branch out to similar sized facilities in other areas of the US for the national search. The ideal candidate must believe in the core values of RRHA and be driven by the mission. The candidate should demonstrate a passion for breaking new ground to lead change, possess a demonstrated ability to both lead and build the capabilities of a driven, bright, diverse team, with preference given to for-profit management experience.
- **LONG-TERM VISION:** RRHA wants to be assured that their team has the best possible talent that reflects their targeted demographics and the people they serve. RRHA recognizes the value of inclusivity and is looking to DG&A to present a comprehensive slate of top professionals who reflect that mindset as well as consult their team on best practices for targeting professionals from these segments.





### Competitor & Target Research

Our directive is to find the best and brightest Chief Operations Officer candidates for Richmond Redevelopment & Housing Authority. Below is a sample of the networks that will be leveraged in order to drive candidates on this search:

#### Housing Authority Sampling – Similar & Local

	Housing Authority	State	Units	Properties
1	Washington	District of Columbia	8,196	102
2	Nashville	Tennessee	5,383	14
3	Louisville	Kentucky	4,478	32
4	Knoxville	Tennessee	3,661	24
5	Chattanooga	Tennessee	2,873	17
6	Memphis	Tennessee	2,703	48
7	Kensington	Maryland	1,554	20
8	Wilmington	Delaware	1,542	20
9	Lexington	Kentucky	1,303	20
10	Charleston	West Virginia	1,203	16
11	Hagerstown	Maryland	1,180	10
12	La Follette	Tennessee	1,115	5
13	Glen Burnie	Maryland	1,024	5
14	Annapolis	Maryland	1,013	10
14	Huntington	West Virginia	907	8
16	Paducah	Kentucky	896	9
17	Jackson	Tennessee	802	13
18	Covington	Kentucky	789	9
19	Johnson City	Tennessee	747	2
20	Morristown	Tennessee	667	1

#### Housing Authority Sampling – Local

#	Housing Authority	State	Units	Properties
1	Abingdon	Virginia	28	1
2	Accomac	Virginia	538	N/A
3	Arlington	Virginia	2,861	27
4	Big Stone Gap	Virginia	46	2
5	Norfolk	Virginia	3,609	25
6	Charlottesville	Virginia	695	14



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7	Covington	Virginia	58	N/A
8	Harrisonburg	Virginia	483	5
9	Leesburg	Virginia	100	1
10	Martinsville	Virginia	477	7
11	New Canton	Virginia	72	N/A
12	Richmond	Virginia	8,031	73
13	Roanoke	Virginia	2,285	28
14	Virginia Beach	Virginia	2,700	34
15	Williamsburg	Virginia	509	6
16	Woodbridge	Virginia	943	8
17	Abingdon	Virginia	28	1
18	Jonesville	Virginia	81	1
19	Williamsburg	Virginia	104	1
20	Duffield	Virginia	111	1
21	Franklin	Virginia	150	3
22	Staunton	Virginia	150	1
23	Waynesboro	Virginia	188	2
24	Coeburn	Virginia	192	6
25	Norton	Virginia	218	1
26	Wytheville	Virginia	220	3
27	Marion	Virginia	238	1
28	Lebanon	Virginia	307	4
29	Lynchburg	Virginia	328	5
30	Charlottesville	Virginia	375	4
31	Bristol	Virginia	410	7
32	Petersburg	Virginia	410	5
33	Suffolk	Virginia	466	5
34	Chesapeake	Virginia	467	5
35	Danville	Virginia	481	8
36	Hopewell	Virginia	490	4
37	Hampton	Virginia	546	7
38	Alexandria	Virginia	823	10
39	Portsmouth	Virginia	1,022	13
40	Fairfax	Virginia	1,060	13
41	Roanoke	Virginia	1,262	11
42	Newport News	Virginia	1,811	11



**Housing Authority Sampling – Smaller National**

	Housing Authority	State	Units	Properties
1	Toledo	Ohio	3,100	18
2	Sacramento	California	1,041	11
3	Gulfport	Mississippi	798	18
4	Brownsville	Texas	708	8
5	Elkhart	Indiana	666	6
6	Gainesville	Florida	628	3
7	Steelton	Pennsylvania	727	11
8	Tacoma	Washington	925	17
9	Albuquerque	New Mexico	953	8
10	Pawtucket	Rhode Island	1,077	7
11	Kansas City	Kansas	2,036	21
12	Duluth	Minnesota	1,151	15
13	Barnwell	South Carolina	781	9
14	Opelousas	Louisiana	690	3
14	Salt Lake City	Utah	619	5
16	Asbury Park	New Jersey	586	7
17	Portland	Maine	993	5
18	Albany	Georgia	1,117	6
19	Anchorage	Alaska	1,258	19
20	Phoenix	Arizona	2,307	23

**Housing Authority Sampling – Larger National**

	Housing Authority	State	Units	Properties
1	Chicago	Illinois	20,782	148
2	Fulton	Georgia	4,533	98
3	Birmingham	Alabama	5,121	28
4	El Paso	Texas	6,081	34
5	Buffalo	New York	4,155	23
6	San Francisco	California	6,055	40
7	Saint Paul	Minnesota	4,242	12
8	Miami	Florida	9,150	51
9	Detroit	Michigan	4,207	48
10	Newark	New Jersey	8,221	47



11	Seattle	Washington	6,207	50
12	Cleveland	Ohio	9,773	42
13	Nashville	Tennessee	5,383	14
14	Philadelphia	Pennsylvania	15,425	113
14	Minneapolis	Minnesota	6,244	26
16	San Antonio	Texas	4,003	56
17	Los Angeles	California	6,897	24
18	Cincinnati	Ohio	5,227	38
19	Boston	Massachusetts	10,406	94
20	Atlanta	Georgia	4,533	98

SAMPLE



David Gomez & Associates Inc.  
Executive Search & Management Consultants

**Timeline**

The following timeline will provide an overview of the customized search process for Richmond Redevelopment Housing Authorities Chief Operations Officer. Throughout the process, DG&A's staff will play a key role in working with RRHA recruiting department to determine what is needed to make this process successful and to work toward a timely execution of tasks. Below is a proposed timeline for a 68 Day Search (with holidays being taken into account). The hire date is being estimated as February 11, 2015.

Activity	60 Day Time Line										
	Week 1	Week 2	Week 3	Week 4	Week 5	Week 6	Week 7	Week 8	Week 9	Week 10	Week 11
	PLAN					ACTION			FINALIZE		
<b>Creating Strategy</b>											<b>Key</b>
Kick-off Meeting											Completed
Discovery Discussion											Scheduled
Position Criteria Established											Issues
Core Competencies Established											
Role Description Created											
<b>Name Generation</b>											
Target List Created											
Position Posted											
Targeted Recruiting											
<b>Screening Candidates</b>											
Behavior-Based Interviews											
Cultural Assessments											
<b>Presenting Candidates</b>											
Short List Created											
<b>Client Interviews</b>											
Client Selection of Finalists											
Client Interviews											
<b>Selection</b>											
Preferred Candidate Selection											
Background Checks											
Reference Checks											
<b>Offer</b>											
Negotiation of Final Offer											
<b>Hire &amp; Onboarding</b>											
Acceptance of Offer											
Final Candidate Starts											

Richmond Redevelopment & Housing Authority  
November – February

November 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18 <i>Kick of Call with Karen</i> <b>COMPLETED</b>	19	20	21 <i>Kick off Call with Adrienne</i> <b>COMPLETED</b>	22
23	24	25	26	27 <b>THANKSGIVING</b>	28 <b>DG&amp;A OFFICE CLOSED</b>	29



December 2014						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3 <i>Project Plan Emailed COMPLETED</i>	4	5 Meet to Discuss Work Plan <b>FRIDAY, DECEMBER 5<sup>TH</sup> AT 9:30AM CST</b>  <b>RECRUITING COMMENCES</b>	6
7	8	9	10	11	12	13
14	15 <i>Ideal Candidate Emailed to the Client</i>	16 <i>Update Call to Discuss the Ideal Candidate TBD VIA PHONE</i>	17	18	19	20
21	22	23 <i>Update Call TBD VIA PHONE</i>	24 <b>CHRISTMAS EVE</b>	25 <b>CHRISTMAS DAY</b>	26	27
28	29	30 <i>Update Call TBD VIA PHONE</i>	31 <b>NEW YEAR'S EVE</b>			



January 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
				1 NEW YEAR'S DAY	2	3
4	5	6 Update Call TBD VIA PHONE	7	8	9	10
11	12 Candidate Presentation #1 Emailed to the Client	13 Client Q&A w/ DG&A on Candidates from Presentation #1 TBD VIA PHONE	14	15	16	17
18	19	20 1st Round of Candidate Phone Interviews From Presentation #1 NEED TIMES	21 1st Round of Candidate Phone Interviews From Presentation #1 NEED TIMES	22	23	24
25	26	27	28	29 1st Round of Candidate On-Site Interviews From Presentation #1 NEED TIMES	30 1st Round of Candidate On-Site Interviews From Presentation #1 NEED TIMES	31



February 2015						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5 Final On-Site Interviews w/ Finalists <b>NEED TIMES</b>	6 <i>Update Call</i> <b>TBD VIA PHONE</b>	7
8	9 <i>Offer Extended</i>	10	11 <i>Signed Offer Letter</i>	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28



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## Richmond Redevelopment & Housing Authority

### *Chief Operating Officer*

#### **LOCATION OF OFFICE**

Richmond, Virginia.

#### **REPORTS TO**

Chief Executive Officer

#### **COMPANY INFORMATION**

Richmond Redevelopment & Housing Authority (RRHA), the largest housing authority in the Commonwealth of Virginia, serves nearly 10,000 residents and manages nearly 4,100 units through its Public Housing Program and through its various Housing Choice Voucher Programs (Section 8) provides subsidized housing assistance to nearly 3,000 families. RRHA also manages neighborhood redevelopment and conservation programs throughout the city of Richmond.

Our mission is to be the catalyst for quality affordable housing and community revitalization, by partnering with residents, community leaders, stakeholders and others in these efforts. We will achieve our vision of building vibrant communities by defining who we are and how we do business using iAct values: Integrity, Accountability, Customer Focus, and Teamwork.

#### **REQUIRED QUALIFICATIONS**

As a prerequisite, the successful candidate must believe in the core values of RRHA and be driven by the mission. The candidate should demonstrate a passion for breaking new ground to lead change. Beyond that, the COO must possess a demonstrated ability to both lead and build the capabilities of a driven, bright, diverse team. For-profit management experience is highly desirable. Additional requirements are:

- **Results**—proven track record of exceeding goals and a bottom-line orientation; evidence of the ability to consistently make good decisions through a combination of analysis, wisdom, experience, and judgment; high level of business acumen, including successful P&L management and the ability to balance the delivery of programs against the realities of a budget; problem solving, project management, and creative resourcefulness.
- **Strategic Vision and Agility**—ability to think strategically, anticipate future consequences and trends, and incorporate them into the organizational plan. Comprehensive knowledge of strategic planning and project management concepts, methods, techniques, and practices.
- **Capacity Building**—ability to effectively build organization and staff capacity, developing a top-notch workforce and the processes that ensure the organization runs smoothly.
- **Leadership and Organization**—exceptional capacity for managing and leading people; a team builder who has experience in scaling up organizations; ability to connect staff both on an individual level and in large groups; capacity to enforce accountability, develop and empower top-notch leaders from the bottom up, lead from the top down, cultivate entrepreneurship, and learn the strengths and weaknesses of the team so as to put people in a position to succeed. A demonstrated ability to effectively coach, counsel, teach, motivate and empower others to meet their performance goals and expectations.



- Action Oriented—enjoys working hard and looks for challenges; able to act and react as necessary, even if limited information is available; not afraid to take charge of a situation; can overcome resistance to leadership and take unpopular stands when necessary.
- Executive Management—thorough understanding of finance, systems, and HR; broad experience with the full range of business functions and systems, including strategic development and planning, budgeting, business analysis, finance, information systems, human resources, and marketing. A high level of ability to exercise initiative and independent judgment in the development and implementation of complex strategic activities, and the formulation of supporting policies.
- Industry knowledge - Considerable knowledge of public housing best practices and systems. Knowledge of federal, state, public-sector and local program standards. Knowledge of public-sector financing, particularly those related to federal, state, and local financing of public housing and redevelopment projects and program. Knowledge of property acquisition and property redevelopment systems, techniques, and practices; includes knowledge of economic development programs, design, planning, and practices.
- Communication - Excellent oral and written communication skills with the ability to present and simplify complex information regarding organization operations. Some information may be highly technical in nature. Operational knowledge of personal computer for use in word processing, project management, spreadsheet and electronic communications.
- Analytical Ability - A high level of ability to comprehend, understand, and interpret complex and technical information, such as public housing regulations, community redevelopment regulations, public-sector financing, and residence and building construction plans; and to comprehend, understand, and interpret organizational and environmental factors that could have potential effects on the success of projects and programs.

#### **MINIMUM QUALIFICATIONS**

(The following requirements may be used to evaluate applicants for employment. When applicable, equivalent substitution will be allowed for differences in experience and education.)

- Bachelor's degree in urban planning, public administration, business administration, or a related field
- 10 to 15 years of progressively responsible executive level management experience in the “for-profit” sector, public housing and/or redevelopment operations;
- Any equivalent combination of education and experience that provides the required knowledge, skills and abilities.

#### **PREFERRED QUALIFICATIONS**

- Graduate degree in business, urban planning or related field.
- Public Housing Manager Certification

#### **RESPONSIBILITIES**

The COO will lead associated operational functions; assign department responsibility in the strategic planning process and direct the development of goals and objectives. Keep the Chief Executive Officer informed of status of all programs, projects, changes or proposed changes related to assigned departments. Present and recommend approval of departmental strategies to the Chief Executive Officer; authorize and direct the implementation of departmental strategies and policies; evaluate results of programs and strategic plan initiatives; and direct corrective action as needed. Ensure the delivery of measurable and cost-effective results that meet or exceed operational goals.

Lead and manage subordinate department directors, managers, and administrative staff to determine and attain organizational objectives and strategies; provide advice, guidance, and direction on department strategic



matters; perform the full range of supervisory activities, including but not limited to, assigning and coordinating work; acting on performance problems; and promoting, developing, disciplining, and rewarding employees. Monitors general status of departmental operations: confers with managers and employees on RRHA activities; visits communities to assess housing conditions and visits housing and redevelopment sites to observe progress of projects. Work with the Board of Commissioners: present to the board at monthly meetings and serve on board committees.

The COO is responsible for planning, developing and managing the Authority's affordable housing programs and services. This includes, but is not limited to:

- Directs the management of affordable housing functions including; the selection and retention of residents, the management and maintenance of properties, administration of the housing choice voucher program, quality control and inspection of properties, modernization/new construction programs, demolition and relocation of residents.
- Responsible for program quality as indicated by related internal and external measures (SEMAP, PHAS, etc...). Implements corrective action plans as necessary.
- Serves as the agency's technical advisor regarding affordable housing programs and services. Makes recommendations and advises the RRHA Board of Commissioners and the Chief Executive Officer.
- Directs development and monitoring of low rent and capital fund budgets. Analyzes capital and operating expenses and revenue projections. Ensures adequate funding to support the activities, programs and services in the agency's strategic plan.
- Develops and implements innovative plans for generating revenues and financing projects. Uses private/public partnerships and other strategies.
- Develops and implements departmental policies and procedures, and ensures compliance with agency policies and procedures and federal, state and local regulations.
- Analyzes industry best practices to ensure that the agency remains competitive in the market.
- Reviews and evaluates programs and projects to ensure operational, regulatory and financial expectations are met. Monitors and evaluates consultants and contractors.
- Plans and conducts complex analytical studies and research projects to assist management with long-term planning and policy development.
- Manages the formulation and implementation of operational objectives and strategies for the affordable housing department.
- Anticipates customer needs and gives high priority to customer satisfaction and service. Develops working relationships with customers to identify needs, and establishes processes to resolve issues/problems.
- Establishes and maintains productive working relationships with local, state and federal government entities, and the business and financial communities, community organizations and citizens.
- Represents the agency at meetings with state, federal and local officials, and serves as a member of external and internal committees, commissions and task forces.

#### **STRENGTH REQUIREMENTS**

- **Sedentary Work:** Exerting up to 10 pounds of force occasionally and/or a negligible amount of force frequently to lift, carry, push, pull, or otherwise move objects, including the human body. Sedentary work involves sitting most of the time, but may involve walking or standing for brief periods of time.



Jobs are sedentary if walking and standing are required only occasionally and all other sedentary criteria are met.

#### TYPES OF PHYSICAL DEMANDS

- *Reaching*: Extending hand(s) and arm(s) in any direction.  
Occasionally - Activity exists up to 1/3 of the time.
- *Handling*: Seizing, holding, grasping, turning, or otherwise working with hand or hands. Fingers are involved only to the extent that they are an extension of the hand, such as to turn a switch or shift automobile gears.  
Occasionally - Activity exists up to 1/3 of the time.
- *Fingering*: Picking, pinching, or otherwise working primarily with fingers rather than with the whole hand or arm as in handling.  
Occasionally - Activity exists up to 1/3 of the time.
- *Talking*: Expressing or exchanging ideas by means of the spoken word to impart oral information to clients or to the public and to convey detailed spoken instruction to other workers accurately, loudly, or quickly.  
Frequently - Activity exists up to 1/3 to 2/3 of the time.
- *Hearing*: Perceiving the nature of sounds by ear.  
Frequently - Activity exists up to 1/3 to 2/3 of the time.
- *Near Acuity*: Clarity of vision at 20 inches or less.  
Frequently - Activity exists up to 1/3 to 2/3 of the time.
- *Accommodations*: Adjustment of lens of eye to bring an object into sharp focus. This factor is important when doing near point work at varying distances from eye.  
Occasionally - Activity exists up to 1/3 of the time.

#### APPLICATION PROCEDURE

To be considered for the position, the applicant must complete and submit the following items:

1. **A resume** summarizing your professional and educational background. This can be done by emailing your resume to [jkeenan@dgai.com](mailto:jkeenan@dgai.com).
2. **A list of former references.** Designate no more than five former managers/references who are prepared to serve as professional or personal references on your behalf. For each reference, provide the person's name, title, address, telephone, and email address. Briefly describe the context in which you know the person. References should be prepared to address your character, reputation, and qualifications to serve as a COO.

**NOTE:** We will only contact your current employer if you are selected as the final candidate and you have obtained a conditional offer on a glowing reference check. All other references will be contacted at our discretion.



**Interview Questionnaire: Chief Operating Officer,  
Richmond Redevelopment & Housing Authority (RRHA)**

<b>Candidate Name:</b>		<b>Date of Interview:</b>	
------------------------	--	---------------------------	--

<b>Position Metrics</b>	
<b>Question</b>	<b>Comments</b>
<p>1. Why are you interested?</p> <p>If they do not list grievances, restate it this way, "If you were the boss of your company, what changes would you make to your upward or downward reporting structure, work setting, office, location, advancement, etc?"</p>	
<p>2. In five minutes or less, walk me through your 10 year career history touching upon major successes solely, and the reasons why you left each position.</p>	
<p>3. Degrees &amp; Certifications</p>	
<p>4. If they make you an offer, it will be contingent on a glowing reference &amp; background check. Is there anything in your background that I should know about, or that will hinder your ability to move forward? <b>They will say no.</b> "Earlier this year, one of my colleagues had a candidate's offer rescinded when our clients found out they didn't list a bankruptcy. While it was unrelated to the training aspect of her job, it shows that being upfront during onboarding is a better policy then negative information coming out during the offer stage. So there isn't anything in your background that I should know about?"</p>	
<p>5. What components make up your compensation?</p>	<p>What is your: <b>Base:</b> <b>Bonus:</b></p>



	<b>Stock: Benefits (do you pay for your benefits? How much does your company pay, how much do you pay?;</b>
6. If selected, what compensation would you expect?	
7. If you left your company, would you owe them any money for educational expenses, relocation, etc.?	
8. When does your prior year bonus payout, how early could you start? Will you need money to offset a bonus that you are leaving on the table at your company?	
9. What financial considerations will be required of you to relocate?	
10. What would you do if your current company counter offers you if you are made an offer?	
11. How long will it take you to onboard? How many days or weeks will you have to give to your current company?	
12. How many direct reports do you have?	
13. Who is your boss (name & title)?	
14. Total Employees in division or org.	
15. What is your housing authority's budget?	
16. Does your housing authority manage and maintain public housing units?  If so, how many units?  Tell me about your impact on the management and maintenance of the units.	
17. Tell me about the developments (different buildings/communities/locations).  How many?	



Any mixed finance/mixed income developments?	
18. Does your housing authority have Housing Choice Vouchers (Section 8)?  If so, how many vouchers?  Tell me about your involvement in dealing with the Housing Choice Vouchers.	
19. Tell me about your experience with redevelopment?  What is a complete demolition or a renovation?	
20. Overall, how many people/families are you serving?	
21. Tell me about your Housing Authorities Designation Status. <ul style="list-style-type: none"> <li>• Moving to Work</li> <li>• High Performer</li> <li>• Standard Performer</li> <li>• Substandard Performer (Troubled In One Area)</li> <li>• Overall Troubled</li> <li>• Capital Fund Troubled</li> <li>• Receivership</li> </ul>	

SAMPLE

Functional Behavioral Based Section		
Question	Rating	Comments
Tell me about your experience managing the selection and retention of you residents?		
In terms of maintenance, what has been your role in maintaining the safety and functionality of your housing?		



What about measuring quality of you housing? Do you have a system for the inspection of properties?		
Have you administered the Housing Choice Voucher program in the past?		
The Housing Choice Voucher program is quite complex. Tell me about your areas of strengths with HCV. What about potential areas of improvement?		
How do you manage properties differently based upon their variances?		
The Housing Authority is partnering with the City of Richmond on several different redevelopment initiatives, what would be your thoughts helping to execute these redevelopment initiatives.		
Goal wise, they are striving to be recognized as a High Performing Agency, how could you help them get to that next level?		
Tell me about you experiencing interacting and giving guidance to a Board of Directors or a Board of Commissioners.		
<b>Operations /Key Performance Indicators</b>		
The Housing Authority needs a full operational assessment to set a strategic agenda. How do you evaluate programs		



and projects from an operational standpoint?		
How do you choose the key performance indicators (KPI's) that you want to monitor?		
What key performance indicators (KPI's) do you currently measure?  Tell me about the progress of the KPI's (Improvements and Progression).		
How does customer satisfaction impact your operations?		
<b>Financial Tracking/Considerations</b>		
How have you developed and monitored low rent and capital fund budgets?		
Have you been required to do revenue projections?		
Tell me about any experience related to generating revenue for redevelopment products.		
Tell me about your business acumen and how it has impacted your career?		
What are your strengths and your areas of improvement from a financial and budgetary standpoint?		



<p>When attempting to better control expenses, what should you focus on?</p> <p>What are some major expense categories you have had success concentrating on and improving?</p>		
<p>Tell me about your experience with quality improvement. Share some examples.</p>		
<b>Regulatory/Quality</b>		
<p>How have you developed policies and procedures while making sure they meet regulatory compliance requirements (Federal, State and Local)?</p>		
<b>Leadership</b>		
<p>As the COO, you will probably make a lot of changes if you are hired into this role. How do you get employees to accept the changes you are making?</p>		
<p>HUD Programs can be very complex. How do you manage an employee that does not have all necessary knowledge to do their job?</p>		
<p>Alternatively, what if your staff is capable, how do you manage that type of team?</p>		
<p>How do you influence colleagues and peers toward action, without necessarily having a</p>		



reporting line authority over them?		
How you create a culture of accountability?		
How do handle individuals who are not in the right position for their skillset? Share some examples.		
Overall, how do you define your leadership and management style?		
<b>Most Significant Accomplishment</b>		
What single project or task would you consider the most significant accomplishment in your career so far? – Can you give me a detailed overview of the accomplishment? Tell me about the company, your title, your position, your role, and the team involved.  What were the actual results achieved?  When did it take place and how long did the project take.  Why you were chosen?  What were the 3-4 biggest challenges you faced and how did you deal with them?  Where did you go the extra mile or take the initiative?		



<p>Walk me through the plan, how you managed to it, and if it was successful.</p> <p>Describe the environment and resources.</p> <p>Describe your manager's style and whether you liked it or not.</p> <p>Describe the technical skills needed to accomplish the objective and how they were used.</p> <p>Some of the biggest mistakes you made.</p> <p>Aspects of the project you truly enjoyed.</p> <p>Aspects you didn't especially care about and how you handled them.</p> <p>How you managed and influenced others, with lots of examples.</p> <p>How you were managed, coached, and influenced by others, with lots of examples.</p> <p>How you changed and grew as a person.</p> <p>What you would do differently if you could do it again.</p>		
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## Sample Candidate Presentation



# HOUSING AUTHORITY OF THE CITY OF PITTSBURGH

Chief Operating Officer

January 20, 2016



SAMPLE





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SAMPLE



## DG&A Search Insights

Insights	Presentation
Days Open	53
Candidates Targeted	134
Resumes Received	23
Interviews Conducted	28
Candidates Presented	6

SA



	<b>Barbara</b>	<b>Craig</b>	<b>Douglas</b>	<b>John</b>	<b>Stephanie</b>	<b>David</b>
<b>Housing Authority</b>	Housing Authority of the County of San Joaquin	Housing Authority of the City of York	City of Nanticoke Housing Authority	Bayonne Housing Authority	Richmond Redevelopment and Housing Authority	Housing Authority of the City of Pittsburgh
<b>Title</b>	Executive Director	Executive Director	Executive Director (Interim)	Executive Director	Chief Operating Officer	Chief Operating Officer (Interim)
<b>Location</b>	Riverbank, CA	York, PA	Wilkes-Barre, PA	Bayonne, NJ	Richmond, VA	Pittsburgh, PA
<b>Compensation</b>	\$147K Base	\$90K Base	\$80K Base	\$124K Base	\$125K Base	\$100K Base
<b>Undergrad</b>	Bachelor of Arts	Bachelor of Science, English	Bachelor of Arts, Sociology	Bachelor of Arts, Communication	Bachelor of Science, Urban and Regional Studies	Bachelor of Arts, History
<b>Graduate</b>	N/A	Master of Education (9 Credits)	Master of Science, Management & Leadership	Masters of Public Administration	Juris Doctorate	Master of Education (3 Credits)
<b>Reports To</b>	Board of Directors	Board of Directors	Board of Directors	Board of Directors	CEO	Executive Director
<b>Direct Reports</b>	12	9	6	6	8	6
<b>Housing Units</b>	1071	1089	419	1279	4000	4,734



## Barbara

### WORK HISTORY

#### **Executive Director, Housing Authority of the County of San Joaquin (February, 2009 – Present)**

Duties in the position include oversight and responsibility for all Housing Authority operations including 8 Housing Authority offices in San Joaquin County, 1400 units of affordable housing including Public Housing, Migrant Housing Centers, Farmworker Housing, Market rate multifamily units, and Senior Project based housing, 4600 Section 8 housing vouchers, 110 Veterans Affairs Supportive Housing Vouchers, 2 waste water treatment facilities, as well as contract vendors such as day care, Headstart, migrant education and construction education facilities. The Housing Authority's budget is just under \$50 million, including funding of up to 100 staff members and has 20 temporary staff or interns. The administration of the agency includes construction and maintenance project management, procurement, information and technology, finance, purchasing, human resources, risk management, and other functions similar to the operation of a small to mid-sized city.

#### **Assistant Deputy Director, Parks Recreation and Neighborhoods /Housing Manager, City of Modesto (2005-2009)**

Responsible for oversight of Housing, Recreation and Code Enforcement Divisions including Community Development Block Grant, HOME Investment Partnership, Emergency Shelter Grant, Moderate Rehabilitation, Redevelopment Agency Housing Set Aside, Neighborhood Revitalization and HUD required economic development programs. Supervised approximately 50 people and \$18 million in funding annually.

#### **Assistant Housing Administrator (Deputy Director), Housing Authority of the City of Salem (1995-2005)**

Responsibilities included acting as Administrator in absence of Administrator. Acted as agency Housing Development Director and Grant Writer/Administrator. Supervise Coordinator of Authority's Construction and Modernization Program, Technology Department, Procurement Officer, Fair Housing Officer, Administrative Operations and Resident Services Section. Develop and Manage Authority's Social Services budgets, and act as tax credit property Asset Manager for Authority. Supervised the Administrative



Operations Division of the Authority including modernization/ construction, technology, clerical support, resource development, housing development, and resident services. (Supervised approximately 35 – 40 staff)

**Resident Initiatives Coordinator, Housing Authority and Community Services Agency of Lane County (1993-1995)**

Successfully wrote agency's first Public Housing Drug Elimination Grants.

Developed and mobilized agency's initial Resident Involvement Strategy including the implementation of volunteer leadership groups at 11 housing sites and training of resident editors for 11 newsletters.

Edited the agency comprehensive resident newsletter, as well as was final editor for all resident newsletters.

Developed agency kids camp and special projects

**Station Chairman, Chairman of Volunteers, Emergency Services Caseworker, Special Projects Coordinator, American Red Cross at Ford Ord, American Red Cross of Lane County (1990-1992)**

Station Chairman - Oversight of Volunteer Program, Fundraising, Volunteer Recognition, Advisory Decisions and Advisory Board of American Red Cross serving 5 military installations and 5 branches of military service.

Chairman of Volunteers - Coordinated Volunteer Program serving Ft. Ord and neighboring military installation. Oversaw the volunteer program of a major (eight floors) hospital, 5 dental clinics, 2 libraries, several troop medical clinics, disaster services, first aid department and others.

Emergency Caseworker - Provided emergency communication, case management and resource services for military families. (Lane County Chapter and Ft. Ord Station.)

Special Projects Grant Coordinator - Mobilized resources and implemented Persian Gulf Family Support Grant Program. Was recognized for processing first grant in the nation. Also collected resources for families burned out of home in single and multifamily housing fires. Provided emergency services for disaster victims.

National Disaster Response - Responded to disasters such as Hurricane Andrew, Missouri Floods and California Wild Fires. Also responded to local emergencies. Certified as training supervisor, liaison to volunteer agencies and general services.

*Spouse stationed in Germany during civilian hiring freeze. Stayed home with children during fall of Berlin Wall, Rumanian Revolution and Operations Desert Shield and Desert Storm. (1989-1990)*



*Positions with lending institutions include; Assistant Branch Manager, Associate manager, Customer Service Representative and Corporate Trainer.*

Worked at Transamerica Financial Corporation (Eugene, OR and Los Angeles, CA,) ITT Financial Corporation, (Seattle, Olympia, Bellevue, Washington,) and Mellon Bank Corp, (Tacoma and Auburn, Washington.) While working in Transamerica Corporate Training Department, wrote programs for personal finance, customer service, and branch management training. (1982-1989)

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## EDUCATION

### Bachelor of Arts, Linfield College

- President of Forensics Academic Fraternity.
- Captain of Debate Team Winner of MaHaffey.
- Award for outstanding forensics team member.
- Varsity cheerleader.
- Student Government Senator and member of Kappa Alpha Phi Sorority.
- Completed 4-year degree in 3 years.
- Internship with State of Oregon Executive Department Training Division.
- Senior Project, Empathic Listening in the Work Place.
- Created Corporate training Instrument to measure empathic listening skills of workplace supervisors. (1979-1982)

## CURRENT SERVICE AFFILIATION

- California Association of Housing Authorities – Incoming President
- Northern California Division California Association of Housing Authorities (Northern California Executive Directors Association), Senior Vice President
- San Joaquin County Workforce Investment - Board of Directors
- San Joaquin County Fair Housing - Board of Directors
- California Housing Authorities Workman's Compensation - Board of Directors
- Mountain House Housing Advisory Board of Directors
- California Affordable Housing Agency – Board of Directors
- Villa Real Non-Profit Housing Inc. – Board of Directors, Director in charge of operations
- San Joaquin Housing Authority Scholarship Foundation – President, Board of Directors
- Child Abuse Prevention Council of San Joaquin County – Board of Directors



*Wm. Craig*

PROFESSIONAL EXPERIENCE

**Forty-one years of progressive experience in housing, community, and economic development specializing in matters of local governances**

**Executive Director,**

Housing Authority of the City of York, 31 S. Broad Street York, Pennsylvania  
August 2013 to Present

- Plan, guide and direct all aspects of a mid-sized City/ County Housing Authority and non-profit affiliates.
- Responsible for \$18.5 million in budgeted operations
- Oversee the creation of a 39 unit Brownfield Tax Credit Development
- Plan and implement the first self-directed Energy Savings Program in Pennsylvania, agency wide
- Handle blue and white collar union negotiations
- Supervise a CORE Team responsible for a staff complement of 81 people
- Represent Housing concerns at county and regional forums
- Recommend Policy to the board of commissioners

**Deputy Executive Director**

Housing Authority of the City of York  
January 2007-August 2013

- Plan, direct and coordinate operational and administrative facets of the Housing Authority and affiliated non-profit companies, CONE Inc., and CAH, Inc.
- Direct activities of assigned departments (maintenance, capital fund, and IT departments and staff).
- Develop and maintain annual and five year agency plans, Language Assistance Plans, ADA Plans.
- Assist with formulating budgetary plans and estimates and establishes controls
- Prepare modernization Capital Funding Applications and administration of related programs and construction related services.
- Development procedures, rules, and regulations and submits recommendations for policy changes to the Board of Directors and Executive Director.
- Serve as ADA compliance manager for the agency.
- Assist in designing programs to increase effectiveness of managerial policies and practices through improved methods, procedures, and organizational structures and makes applications for competitive grants through public and private sources.
- Supports personnel management for the agency, including benefits programs, supervision and grievance processes.
- Serves as the Housing Authority's representative at meetings, conferences, and hearings.
- Performs lead roles in planning new projects through public review procedures and plan development coordinating services of planner, attorneys, architects and engineers.
- Serve as hearing officer for agency appeals in both Public Housing and Section 8 programs.
- Perform lead staff service on energy related improvements and contracting, including ESCO procurement, IGA development and contracting services.
- Lead special initiatives such as partnership programs with related agencies, internal Page 6



system upgrades such as IT document imaging, phone systems recreation, security camera system design.

- Lead planning and application processes for Low Income Housing Tax Credit developments and special development initiatives such as the acquisition-rehab-resale program for supported homeowners.

#### **Executive Director**

South Central Assembly, 777 West Harrisburg Pike Middletown, Pennsylvania  
October 1998 to December 2006 (Continuing as consultant to the Assembly through October 2008)

- Served all fiscal and administrative functions of Executive Director for an eight-county non-profit organization, with a fifty-seven member Board of Directors.
- Worked to improve governance in the region through efficiencies, effectiveness, and economies of scale especially in areas of local government services, planning, transportation, and land use, and growth management.
- Designed and conducted studies and analysis of programs and services of counties, municipalities, governmental authorities, and school districts in the region: affordable housing, tax implications of land use policy, anti-predatory lending policy, study of foreclosures in the region.
- Developed surveys, reports, symposia, summits, workshops and training programs for professionals and lay leaders on topics related to specific aspects of governance

#### **Director, Bureau of Licenses, Permits, and Inspections**

City of York, Pennsylvania  
July 1996 to October 1998

- Directed and supervised a staff of seven individuals including health and building inspectors, permits manager and assistant, and deputy building official.
- Led and administered all City zoning, building, and health permitting and licensing.
- Served as member and professional staff to the Historic and Architectural Review Board and Zoning Hearing Board.
- Increased monitoring of building activity, established a new City record keeping system, created a citizen inspector program to empower neighborhood residents and non-profit organizations.
- Led prospective business development inter-discipline work group.

#### **Housing and Community Development Supervisor**

Department of Community Affairs, Commonwealth of Pennsylvania  
June 1993 to July 1996

- Directed regional federal HOME and Community Development Block Grant program analysts in the administration of these programs.
- Managed 300 open housing and redevelopment assistance contracts for state funded housing, community development, and federal pass through emergency shelter and permanent housing projects.
- Provided training and technical assistance to local government administrators, elected officials, and non-profit corporations on housing rehabilitation and development, elements of the Main Street program for central business districts, and homelessness abatement strategies.
- Served on the Commonwealth Faculty Institute and provided training to supervisors within the Commonwealth including all councils, agencies, and affiliated organizations under the governor's jurisdiction.



**Housing and Development Analyst**

Department of Community Affairs, Commonwealth of Pennsylvania  
July 1980 to June 1993

- Administered federal and state grant and loan programs for housing production, community and economic development, which generated more than \$7.6 million in state income.

**Regional Planner**

Department of Community Affairs, Commonwealth of Pennsylvania  
October 1978 to July 1980

- Lead detailed program and fiscal training for regional planning commissions, rural development organizations, non-profits, and housing authorities.
- Retained over \$10 million in housing and community development funding for the Commonwealth.
- Developed the Coal Energy Impact (601) Program on fuel crisis planning for the national office of the Farmers Home Administration, United States Department of Agriculture.

**Community Relations Supervisor / Relocation Supervisor**

Dauphin County Housing and Redevelopment Authority, Steelton, Pennsylvania  
1973 to 1978

- Supervised staff of five Community Relations Specialists and coordinated citizen participation and relocation activities within five disaster and renewal areas.
- Wrote federal redevelopment proposals and housing development applications.
- Developed newsletter and annual reports and served as a public relations liaison.
- Conducted staff services for Section 8 rental assistance. Technical support for housing rehabilitation initiatives
- Supported redevelopment, community development and housing project federal and State planning

**EDUCATION**

University of Wisconsin  
4 C.U. International Mechanical Code Inspections, February 1998.  
4 C.U. Building Codes and Plan Reviews, February 1997.

Pennsylvania State University  
Institute of Regional Affairs, Economic Development Course, December 1994.

Pennsylvania State University  
Dual Course work: Master of Urban and Regional Planning and Master Humanities Program (45 credits), 1974-1981.

Shippensburg University  
Bachelor of Science in English with minors in Speech and Drama (132 credit hours), 9 credits towards Master of Education Program, 1968-1972. Masters work 72-73

**COMMUNITY SERVICE**



- Member 10,000 Friends of Pennsylvania Policy Council
- Board Member and Past President of my congregation (2000-2002) (2008-2009)
- Member and President of PSU Cooperative Extension Board) (2004-2005)
- Member Board of Modern Transit Partnership (2002-2008)
- Member of the Board of Housing Alliance of Pennsylvania (2006-2013)
- Past President Central PA National Association of Housing and Redevelopment Officials
- Co-Chair Healthy York Housing Coalition (January 2002 through May 2007)
- Chair, York Counts Economic Development Task Force (2003)
- Member of the Board of the Horn Farm Learning Center (2006-2008)
- Member York City Rotary International (current)
- Member Board Restore York (2007-2013) (Vice Chair 2008-2013)
- Member Historic Architectural Review Board City of York (1996-1996) (2008-current)

REFERENCES
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## DOUGLAS

### CAREER TARGETS: MANAGEMENT, CUSTOMER / GOVT. RELATIONS, PUBLIC RELATIONS

Background in leadership positions that includes current Executive Director position for a city Housing Authority and previous management role overseeing a team of 1,700. Experience and success in managing Government Relations, Customer Relations, Sales, Contracts, and Public Relations.

*Portfolio of achievements includes multimillion-dollar cost reductions and revenue increases, new program implementations, policy and procedure formation, and organizational restructuring. Recently led the City of Nanticoke Housing Authority to achieve 100% occupancy for the first time in its history.*

- Success in providing strategic planning, team leadership, and problem resolution within complex organizations.
- Penchant for bringing innovation and change within challenging environments, including turnaround situations.
- Demonstrate the ability to make difficult decisions and achieve buy-in from initially reluctant team members.
- Excellent project and program management skills, maintaining meticulous attention to detail as well as the big picture.

Knowledge/skill areas include:

- Inter-Organizational Collaboration and Teamwork
- Budget Planning, Preparation & Administration
- Building Relationships with Government Personnel
- Public/Community and Media Relations Activities
- New Program Conceptualization, Design & Launch
- Business Development, Sales & Marketing Solutions
- Short-Term & Long-Term Strategic Planning/Execution
- Customer Satisfaction, Loyalty & Retention Strategies

### PROFESSIONAL EXPERIENCE

CITY OF NANTICOKE HOUSING AUTHORITY – Location – 2012-Present

#### Executive Director (interim)

Direct all day-to-day operations for the Housing Authority (419 apartments, 51 Section 8 vouchers, and annual Capital Projects Plan ranging from \$400,000 to \$600,000). Supervise team of 19 and report to the Board of Directors. Complete grant writing, manage human resources functions, and developed agendas for public meetings. Additionally oversee all activities of non-profit New Horizons comprised of 6 rental units. Work closely with employees to improve performance and adapt to changes, including the use of updated technologies as well as adherence to organizational policies. Plan and administer \$2.5 million annual budget.

#### KEY CONTRIBUTIONS & ACHIEVEMENTS:

- ✓ **Increased interest income by \$44,000 annually** by streamlining bank accounts from 9 to 5 and securing better interest rates through use of one bank and an informal RFP process.



- ✓ **Reestablished the Housing Authority's website**, updated Purchasing/Occupancy/Section 8 policies and Tenant Lease, introduced Veteran's Preference, and formalized ranking system for housing applicants.
- ✓ **Established low-income Summer Workers Program**, Physicians Panel for worker's compensation claims, 4 Training Programs for employees, and a cross-training initiative. Additionally upgraded security at all locations and submitted grant for security improvements.
- ✓ **Led the Authority to achieve high-performance status for the past 2 years** through the U.S. Department of Housing and Urban Development; guided the Authority to reach 100% occupancy for the first time in its history.
- ✓ **Captured series of cost savings and credits that included a \$70,000 savings** by negotiating a loan modification, \$21,500 in rebates by purchasing energy-efficient refrigerators, \$28,000 savings by moving employee healthcare to a deductible plan, \$1,250 from past sales tax charges, \$5,900 in credits from improper vendor work, \$1,200 savings by eliminating an unnecessary benefit program, and a 17% annual utility savings from negotiating gas/electric contracts.

LUZERNE COUNTY – Wilkes-Barre, PA – 2008-2012  
**Manager / Chief Clerk**

Served as the highest appointed public official in Luzerne County (population of over 320,000). Oversaw the county's 1,700 employees, ensuring compliance with the county's administrative code, personnel policy, purchasing procedures, and union agreements. Maintained books and accounts for 3 Commissioners; directed the annual budgeting process. Prepared and filed all public meeting agendas, sealing all required documents. Coordinated information technology activities county-wide. Served as Acting Purchasing Director, Acting Human Resources Director and Acting Transportation Director.

**KEY CONTRIBUTIONS & ACHIEVEMENTS:**

- ✓ **Reduced the county's budget from \$146 million to \$125 million** from 2009 to 2011 through staff reorganization and expense cuts; eliminated the county's need for borrowing to cover deficits, balancing the budgets for 2009 and 2010 as the deficit decreased from \$46 million to \$6 million.
- ✓ **Contributed to Luzerne County's #1 ranking in property values** by the state of Pennsylvania through interacting with departments to perform the 1<sup>st</sup> county-wide property tax reassessment in over 40 years (reversing the county's prior ranking of 66 out of 67 counties).
- ✓ **Eliminated 150 positions within the 1,700-plus employee headcount** by implementing county-wide organizational restructuring based on current economic conditions. Negotiated 13 union contracts and participated in 2 contract arbitration hearings.
- ✓ **Currently implementing the county's 1<sup>st</sup> time management system** that includes time accruals and payroll functions, with a projected savings of \$1.5 million annually; currently implementing county prison's 1<sup>st</sup> day reporting center, with the program reducing the prison population from ~900 to 700 and generating a \$919,000 cost savings.
- ✓ **Decreased cell phone expenses from \$155,000 to \$65,000** by reducing the number of phones as well as negotiating an improved service plan. Reduced newspaper advertising expenses through RFP and web site notices; currently working on print management system to reduce copying-related expenses (projected \$500,000 savings in 3 years).
- ✓ **Formed the Energy Savings Committee to reduce energy-related expenses**; decreased energy costs by approximately 20% due to competitive bidding and new energy-efficient HVAC systems.
- ✓ **Wrote and implemented the county's 1<sup>st</sup> travel policy**, right-to-know policy, hiring freeze and discretionary spending freeze guidelines, and RFP grading forms. Increased government transparency by posting Commissioner's Meeting agenda and minutes on the county web site for the 1<sup>st</sup> time.



- ✓ **Paved the way for a future \$1-2 million savings** through efforts in implementing county-wide transportation consolidation of 3 entities. Competitively bid county-wide vehicle fleet maintenance and towing; bid the county's vending machines and subsequently increased commission revenue by approximately \$18,000 annually.
- ✓ **Initiated free Emergency Alerts Program** for county residents and employees through cell phone and email notification; completed addressing project through 9-1-1 system to ensure registration of residents in the outlying areas of the county within the computerized dispatched system.
- ✓ **Implemented credit card payments provider** that allows residents to pay fees and taxes with credit cards, increasing revenues as a result. Privatized tax claim office to increase revenue collections.

#### LUZERNE & WYOMING COUNTIES- TRANSPORTATION DEPARTMENT – Forty Fort, PA – 2007-2008

##### Acting Interim Director

Managed bi-county transportation agency that provides trips for special needs clientele (over 280,000 trips per year, 1.5 million miles per year), supervising ~80 that included 3 managers. Assumed selected responsibilities of Operations Manager, including hiring and evaluating drivers and child care aides, training drivers, and administering driver complaints/accidents.

##### KEY CONTRIBUTIONS & ACHIEVEMENTS:

- ✓ **Increased driver ranks to improve service** and introduced changes within the organizational culture to meet standards mandated by state oversight agencies. *(continued)*
- ✓ **Implemented fare increase to offset rising maintenance and fuel costs**; hired full-time fiscal officer to strengthen the finance department.
- ✓ **Launched the Rural Transportation Program for Persons with Disabilities.** Opened up lines of communication between external agencies to improve client service.

#### LUZERNE COUNTY OFFICE OF HUMAN SERVICES – Wilkes-Barre, PA – 2006-2008

##### Contracts Manager

Managed over 400 provider contracts used by the Office of Human Services and its partner agencies, including the Area Agency on Aging, Children & Youth, Drug & Alcohol, Transportation and Mental Health/Mental Retardation.

##### KEY CONTRIBUTIONS & ACHIEVEMENTS:

- ✓ **Ensured agency's adherence to the county's purchasing policy** in regards to bidding contracts, overseeing contracts to monitor compliance from county agencies and providers.
- ✓ **Served on several key committees**, including the Crime Suppression Initiative, Feasibility Group for the Universal Intake and Referral Form, OHS Building Space Study and Luzerne County Safety Committee.

#### NORTH/SOUTH FLORIDA PRIDE MOBILITY PRODUCTS – Exeter, PA – 2002-2006

##### Inside Sales Account Executive, 2003-2006; Inside Sales / New Account Development, 2002-2003

Managed the account base covering the North Florida and South Florida region for the world's largest manufacturer of scooters, lift chairs, and power wheelchairs. Negotiated short-term and long-term sales contracts with dealers. Entered orders into My Pride proprietary system and tracked all orders through delivery. Opened new accounts and translated Medicare codes and guidelines. Managed all aspects of the sales lifecycle, from prospecting through closing.

##### KEY CONTRIBUTIONS & ACHIEVEMENTS:

- ✓ **Grew and maintained over 150 accounts ranging up to \$3 million in annual sales**, ranking in the top 3 in Inside Sales (based on number of accounts with the most growth) for 3 months in 2005.



- ✓ **Maintained expansion within the most competitive territory in the country** despite stricter guidelines for reimbursement imposed by Medicare. Provided recommendations for various marketing and finance programs.

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### EDUCATION & CREDENTIALS

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**Master of Science in Management & Leadership:** EAST STROUDSBURG UNIVERSITY – East Stroudsburg, PA

**Bachelor of Arts in Sociology:** BLOOMSBURG UNIVERSITY – Bloomsburg, PA

**Leadership Competency for Managers Course:** PENN STATE UNIVERSITY – University Park, PA

**Professional Training:** Work Place Safety Training Certificate, Coccia & Associates; Sensitivity Training; Section 8 Training; Leadership Wilkes-Barre; Martial Arts Training, Present; Natural Gas Drilling Certificate; The Path to Excellence in Governance Spring Leadership Program; Nonprofit Summit; Police Department Internship

**Professional Affiliations:** Luzerne County Homeless Coalition; Luzerne County Housing Transition Committee; Secretary, New Horizons Development Corporation; Chairman, Nanticoke Housing Authority Employee Safety Committee

**Recognitions:** Martin Karate Institute: 2010 Student of the Year, 2<sup>nd</sup> Degree Brown Belt; Silver Medalist in 2009 and 2010; Biltmore: Who's Who, 2008; Pride Mobility Products; 2005 Sales Team of the Year, 2003 Quantum Sales Team of the Year; Pennsylvania Newspaper Publishers' Association Foundation & Pennsylvania Society of Newspaper Editors: 2001 Keystone Press Award; Arthritis Foundation: Certificate of Appreciation, 1999; Special Olympics: Media of the Year Award, 1998

**Community Affiliations:** Habitat for Humanity, St. Vincent DePaul Soup Kitchen, Red Cross Blood Donor, Head Start, Coughlin Football Gridiron Club, Ryan Zavada Foundation, Arthritis Foundation, Special Olympics



## John

### Experience

- **Bayonne Housing Authority**
  - **Executive Director** 1995 – present
  - **Assistant Executive Director** 1992-1995
  - **Director of Staff Operations** 1991 - 1992

Progressively responsible for the administration and management of low income and affordable housing programs including but not limited to:

- 1250 units of public housing, 250 Housing Choice vouchers, 100 “port in” vouchers, 262 rent controlled units and the management of 250 additional low income units.
- An overall annual budget in excess of \$15 million.
- Supervising a staff of over 75 employees
- Overseeing 3 national award winning first time homeownership programs from conceptualization to construction to occupancy.
  - Roberson Homes
  - Peninsula Commons
  - Roberson Homes West
- Acting as liaison on behalf of the BHA with federal and local governments, tenants and the general public.
- Creating the Homework Opportunity Program (HOP), an afterschool program run in conjunction with the Bayonne Board of Education that provides supervised homework assistance and completion and supervised recreational activities.

### Education

- **New York University, Wagner School of Public Service**
  - Masters of Public Administration (MPA)
- **Rutgers University**
  - Bachelor of Arts – Communication
- **Certified Public Housing Manager**
- **NJ Public Housing Executive Director Certification**



## **Memberships and Activities**

- **New Jersey Chapter of National Association of Housing and Redevelopment Officials (NJNAHRO)**
  - Vice President for Legislation (13-present)
  - Past President (09-11)
  - Senior Vice President (07-09)
  - Vice President for Professional Development (05-07)
    - Developed, marketed and executed training sessions for NJ PHAs.
  
- **National Association of Housing and Redevelopment Officials**
  - National Housing Committee ( 11- present)
  - Nominations and Elections committee (09 - present)
  - Legislative Network (09 – present)
  - National Awards Judging Committee (10-present)
  - National Member Services Committee (09-11)
  
- **Middle Atlantic Region Council (MARC) NAHRO**
  - Chairman Housing Committee (12 – present)
  - Member 2007 – present
  
- **Public Housing Authorities Director Association (PHADA)**
  - Housing Committee (2010-present)
  - Member (99- present)
  
- **New Jersey Public Housing Authority Joint Insurance Fund (NJPHAJIF)**
  - Executive Board (07 – present)
  - Claims Review committee (07 – present)
  
- **Council of Large Public Housing Authorities (CLPHA)**
  - Member 2013
  
- **Bayonne Urban Enterprise Zone**
  - Board member (2002-2012)



## STEPHENIE D.

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**ASSET MANAGEMENT AND REGULATORY COMPLIANCE PROFESSIONAL** with a distinctive blend of operational and legal knowledge of HUD's housing programs, which translates into the capacity to align operational tasks with regulatory requirements.

### CORE COMPETENCIES

- Strong team building attributes and exceptional public communication skills.
- Proficient in drafting policies and standard operating procedures.
- Experienced in government purchasing requirements.

### PROFESSIONAL DETAIL

**Richmond Redevelopment and Housing Authority ("RRHA"), Richmond VA**

**Chief Operating Officer** (October 2012-Present)

- Oversees the Low Income Public Housing Program, Housing Choice Voucher Program, Central Maintenance, and Resident Services Department.
- Leads the effort to streamline the housing authority's operations.
- Coordinates with the City of Richmond, Community Health District to open an onsite Health Resource Center in the largest public housing community.
- Applied for and received HUD's set-aside funding during the 2013 federal sequester.
- Applied for and received HUD's Rental Assistance Demonstration ("RAD") conversion approval for 373 public housing units and contributed to the formation of solicitation documentation to select the Master Developer.
- Directed \$2.7M in construction and rehabilitation contracts under RRHA's 2011 Capital Fund to timely meet the 2013 obligation deadline.
- Introduced a "Hotline" for Housing Choice Voucher Program landlords and participants to provide confidential information regarding suspected fraud and abuse.
- Introduced a "Live-in-Maintenance" strategy to reduce maintenance overtime expenses by \$250,000.00.
- Introduced and drafted a Resident Council Funding Agreement and drafted solicitation documentation to procure an independent third party to oversee resident council elections, in compliance with federal regulations.
- Directed the application for and received 15 additional Veteran's Assistance Supportive Housing ("VASH") vouchers.
- Directed the coordination of the 2013/2014 annual agency plan.
- Coordinated a Resident Services' Partnership Fair to invite service agencies to provide social services for public housing residents and mobility counseling for housing choice voucher participants.
- Coordinated with the City of Richmond, Department of Economic Development to fully implement a "Workforce Pipeline" to assist low-income individuals in gaining training and access to employment.



**Chicago Housing Authority, Chicago, IL (1998-2012)**

***Director of Compliance***, Asset Management Department (July 2009-September 2012)

- Assisted in the oversight of private property management companies for 21,000 public housing units.
- Assisted in strategic planning to implement regional asset management model.
- Coordinated all facets of the private property management transition from fourteen (14) to five (5) private property management companies.
- Provided subject matter requirements for the property management system (*YARDI*) upgrades.
- Initiated private property management's required use of HUD's Enterprise Income Verification ("EIV") system.
- Managed the "Command Center" for General Waitlist Opening after being closed for 14 years.
- Coordinated annual revisions to the Admissions and Continued Occupancy Policy ("ACOP"), including the introduction of a resident work requirement.

***Resource Executive***, Asset Management Department (February 2005-July 2009)

- Advised department leads and private property managers on federal regulations and agency policies.
- Prepared Board of Commissioners' memoranda for approval of departmental initiatives and significant actions (including purchases over \$100,000).
- Coordinated with Procurement Department to purchase services and supplies required; managed contracts for department and site related requirements.

***Special Projects Manager***, Operations Division (May 2001- February 2005)

- Managed counsel for private property management in litigation of lease enforcement cases.
- Advised executive staff on lease enforcement initiatives and legislation.
- Coordinated the deployment of local law enforcement for safety and security checks.
- Liaison for State and Local Correctional Facilities.

***Staff Counsel***, Office of the General Counsel (January 1998- May 2001)

- Drafted and negotiated contracts for Operations Department and Resident Services Department.
- Prepared legal opinions and reviewed Board of Commissioners' Memoranda and Resolutions.
- Represented housing authority in lease enforcement cases and defended housing authority in tenant initiated lawsuits.
- Resident Grievance Hearing Officer (1998)

**Cook County State's Attorney's Office, Chicago, IL (May 1993-July 1994)**

***Victim-Witness Assistant/Assistant Office Manager /Librarian***

- Assisted victims/witnesses in Illinois Criminal Appeals Court.
- Assisted State's Attorneys with legal research.
- Managed the Criminal Appeal Library.



**EDUCATION**

DePaul University, College of Law, Chicago, IL  
**Juris Doctorate** (1997)

Cornell University, College of Architecture Art and Planning, Ithaca, NY

**Bachelor of Science Degree** (1993)

- *Major:* Urban and Regional Studies
- *Study Abroad:* Conducted independent research on juvenile crime trends in Rome, Italy, 1992.

Public Housing Management Certification, Nan McKay and Assoc. (2007)

Public Housing Rent Calculation Certification, Nan McKay and Assoc. (2007)

Housing Choice Voucher Executive Certification, Nan McKay and Assoc. (2013)

Project Based Section 8 Certification, Nan McKay and Assoc. (2013)

**REFERENCES**

Available upon request.

SAMPLE



*David*

**SUMMARY:** Experienced professional seeking new challenges in improving the efficiency and effectiveness of government and non-profit agencies, programs and operations; and to make a contribution to community development and revitalization. Over 20 years of experience in program management and evaluation; operational management and system reform; organizational development and transition management; grant proposal and request for proposal preparation, management, and evaluation; policy analysis and advocacy; community organizing; community and government relations; strategic planning and facilitation.

**EDUCATION**

- Harrison High School, Harrison, NY 10528 Regents Diploma, June 1981.
- Wesleyan University, Middletown, CT 06459 - BA with Honors in History, May, 1986.
- Southern Connecticut State University, New Haven, CT 06515 – Graduate coursework in education (3 full semester credits), 1988-1990.

**PROFESSIONAL EXPERIENCE**

**Housing Authority of the City of Pittsburgh, Pittsburgh, PA – June 1996 to present**

***Accomplishment Highlights:***

- Primary Moving To Work Demonstration Program leader; led efforts to develop innovative rent policies, redevelopment strategies, operational initiatives, social service programming, evaluation mechanisms, etc.
- Led team preparation of Choice Neighborhoods Planning Grant Application, securing competitive runner-up status.
- Led and coordinated efforts to secure, implement, maintain compliance, and complete reports on American Recovery and Reinvestment Act grant of \$26.8 million.
- Conducted analysis of property viability and prepared appropriate documentation to secure approval of demolition of one property and investment in another property.
- Led effort to educate congressional leaders and HUD to secure extension for Housing Authority of Moving To Work Agreement.
- Led operational re-organization of agency from centralized property management to site based property management. Transition completed without disruption in service.
- Liaison to HUD Inspector General on two separate audits, minimizing negative findings.
- Led transition of contracted human services to in-house operation at the at the HOPE VI funded Bedford Hope Center without disruption of services, leading to substantial savings, extension of provided services, and improved outcomes.
- Led efforts to improve human service contractor performance through improved service scopes, added focus on outcomes, increased monitoring, and use of performance based funding agreements.
- Played key role in re-writing agency procurement policies and procedures and training staff on same.
- Prepared grant proposals resulting in the award of over \$9,000,000 to the Housing Authority.
- Instituted competitive procurement of human service contracts, replacing sole source awards to tenant councils, without alienating councils and resulting in substantially improved service quality and performance.
- Created relationships with agencies and organizations across the city and county to improve service provision.



***Specific Positions, Responsibilities, and Accomplishments (all positions 40+ hours)***

**Government Relations & Special Services Officer, Executive Office – Jan. 2004 – Present**

Supervisors: Caster D. Binion, Executive Director, August 2012 – present, . 412-456-5012. A. Fulton Meachem, Jr. Executive Director, August 2006-July 2012. May be contacted at Charlotte Housing Authority, 704-336-5221.

Please notify me prior to contacting. Keith Kinard, Executive Director, January 2004-June 2006. May be contacted at Newark Housing Authority. 973-430-2430. Responsibilities and accomplishments:

- Led effort to develop, secure approval, and implement innovative Moving To Work Rent Policy requiring work or participation in Self-Sufficiency Programming for all non-elderly, non-disabled, resident adults paying less than \$150.00 per month in rent.
- Develop and implement strategies to create relationships and leverage support at the state and federal levels.
- Track and analyze impact of new and proposed policies relating to Low Income Public Housing, the Section 8 Housing Choice Voucher Program, and the Moving To Work Demonstration Program.
- Prepare presentation materials, correspondence, and other communications including meetings on HACP's plans, goals and strategies.
- Monitor progress of HACP's Moving to Work Initiatives.
- Lead and manage internal agency Strategic Planning Process; monitor implementation.
- Oversee and coordinate preparation of Moving To Work Annual Plans and Reports.
- Act as Lead Contact in discussions/negotiations with HUD regarding all Moving To Work related issues.
- Completed all work needed to implement an innovative effort to utilize Moving To Work Demonstration Program flexibility to establish a donor directed fund at a local foundation to provide dedicated funding for youth programming in public housing. Tasks included research, planning, presentations, procurement of foundation partner and investment manager, negotiation of agreements, identification of advisory committee members, establishment and staffing of advisory committees, and securing HUD and HACP Board approval.

**Acting Housing Programs Officer (Acting Chief Operating Officer) – June 2005 – Dec. 2006**

Supervisor Keith Kinard, Executive Director. May be contacted at Newark Housing Authority. 973-430-2430.

- Led successful transition of operation to new site management structure involving major re-organization and merging of departments. Project responsibilities include leading project steering committee of department directors and two consultants, review and selection of 3 asset managers, 12 Site Managers and 13 assistant site managers, and the reassignment to new supervisors of approximately 200 maintenance laborers and tradespersons. Establishment of procedure manuals, site performance goals and benchmarks, creation of new reporting categories and systems. Maintained responsibilities for operational oversight throughout and subsequent to transition. This transition was completed with little or no disruption of services to residents.
- Oversight responsibility for Occupancy Department (Admissions) – Lead effort to prepare for and implement site-based waiting lists for the authority.
- Oversight of operations functions including:
  - Site Management of 21 locations, 3 regional managers overseeing 6 regional support staff, 25 Managers and Assistant Managers, and 134 field maintenance staff.
  - Asset Management - Oversight and compliance monitoring of 6 completed mixed finance developments; provide operations input on 3 additional projects underway.
  - Mail room and internal mail functions.
- Oversight of homeownership program, *inc.* growth of program to new achievement levels.



- Led effort to complete a new Admissions and Continued Occupancy Policy, including compliance with all applicable regulations and requirements of HACP's Voluntary Compliance Agreement with HUD regarding services to persons with disabilities.
- Direct reports, with staff numbers and contracted amounts, as follows: (total 231 employees)
  - Director Occupancy Department (14 staff, \$55,000 in contracts)
  - Director Resident Self-Sufficiency Department (31 staff, \$750,000 in contracts)
  - Director Section 8 Department (36 staff)
  - 3 Regional Real Estate Asset Managers (143 total regional and site staff, including maintenance and management)
  - Operations Administration Department of 7 including 6 direct reports:
    - Asset Management Financial Specialist
    - Senior Technical Manager
    - Senior Program Manager (with one report - homeownership program)
    - Project Manager
    - Administrative Specialist
    - Mail Clerk
    - \$400,000 in contracts
- Continue oversight of Department of Resident Self-Sufficiency and non-capital grant funding.

Acting Director, Department of Resident Relations & Human Services - Nov. '03 - June '04.

Supervisor Keith ~~Kimard~~, Executive Director. May be contacted at Newark Housing Authority. 973-430-2430.

Manage all programming operated by a staff of 10 Self-sufficiency coordinators, 5 Resident Initiative Specialists, 3 FTE ~~Youthsports~~ staffs, 3 Neighborhood Networks part time staffs, 1 grant and contract administrator, 2 administrative assistants, and over \$500,000 dollars of competitively procured and contracted services annually. Programs included Family Self-Sufficiency Program, senior service programs, youth programs, resident involvement programs, and computer training programs.

- Led transition of community based HOPE 6 supportive service program from externally contracted activity to an internally staffed activity hiring 6 staff and maintaining community support and program quality.
- Established new program output and outcome goals and improved program performance.
- Established new program monitoring procedures for contracted services and improved program performance.
- Conducted search and selection of Department Director.

Grants & Government Relations Officer – January 2003 – January 2004.

Supervisor Jeffrey Bees, HACP Chief Financial Officer now at UPMC. May contact at 412-977-6393.

- Maintain all previous responsibilities (see below).
- Develop and implement plan to increase effectiveness of all federal and state government communications, especially communications relating to federal and state program policies, interaction and relationships with state and federal elected and other officials.

Senior Grant & Contract Administrator, Dept. of Grant & Contract Compliance – February 2000 – January 2003.

Supervisor Scott Smith. May contact at HUD Pittsburgh Field Office Multifamily Housing.

- Monitor and report on grant program progress.
- Review departmental and Authority operations for regulatory compliance.
- Develop and revise procurement policies and procedures to ensure regulatory compliance.
- Prepare training for Authority staff in new procurement policies and procedures.
- Prepare grant proposals and reports.
- Coordinate inter-departmental cooperation on program and project implementation.



- Analyze Mixed Finance Regulatory and Operating Agreements to assess operating subsidy obligations.
- Assist department to establish new performance measures for contracted social services.
- Conduct site visits to confirm compliance and performance of contracted social services.
- Developed pilot effort to utilize performance based funding agreements for social service programming.

Grant Manager, Dept. of Financial Services – November 1997 – February 2000.

Supervisors Beth Eriel, CFO and David DeFida, Acting CFO. Neither still at HACP.

- Monitored activities to ensure effective implementation of grant funded programs.
- Developed program initiatives, identified partners, and prepared grant proposals.
- Analyzed, reviewed & monitored budgets and expenditures, reported on program progress.
- Provided management and tracking of multiple grants, from application to close out, totaling \$6.5 million.
- Improved program performance and contractor accountability, added new programs and partners, and prepared successful grant applications.
- Acted as liaison to HUD Inspector General for grant program audit.

Grant Writer, Dept. of Resident Relations & Human Services - June 1996 – Nov. 1997.

Supervisor Patricia Hairston, Director, Dept. of Resident Relations & Human Services. No longer at HACP.

- Developed programming, identified and cultivated program partners, identified funding sources and prepared grant proposals.
- Monitored implementation of grant funded programs.
- Established new subcontractor invoicing and program reporting standards.

Reading Is FUNDamental Pittsburgh (Central Northside Reading Is FUNDamental) Pittsburgh, PA

Executive Director – June 1995 – June 1996.

Supervisor Marjorie Radelet, Board President, May be contacted at 412-322-1188. Responsibilities included:

- Managed all aspects of operation for community based non-profit literacy organization serving 2,800 children at 28 sites.
- Supervised one full time and 15 part time staff.
- Responsibilities included fundraising, budget planning, program implementation, staff supervision, Board staffing, volunteer recruitment and supervision, program development, strategic planning, and resource development.
- Met fundraising goals, increased volunteer participation, improved staff training, and increased numbers served.

**Accomplishment Highlights**

- Secured over \$1,000,000 in funding for continuation and expansion of programs.
- Led agency as Board President through strategic planning process that resulted in transition of agency from a local neighborhood organization to an organization serving communities across the city and its immediate surroundings.
- Oversaw agency as the program size, budget, and staff all grew by over 100% while maintaining program quality.

New Rochelle Municipal Housing Authority, New Rochelle, NY – May 1993 – May 1995

Resident Programs Coordinator.

Supervisor Stephen Horton, Executive Director. May be contacted at 914-235-1717.

*Responsibilities and Accomplishment Highlights*

- Created Office of Resident Programs to respond to residents' human service needs.



- Re-organized dormant resident council, which held elections, operated after school programs, and secured a HUD Tenant Opportunity Program grant.
- Created and produced a monthly resident newsletter.
- Established relationships with local agencies to provide on-site services to residents at no cost to the Housing Authority.
- Managed direct service programs including summer youth employment program, Resident Security Guard program, and Section 3 resident employment effort.
- Collaborated in development of program strategies and proposal preparation.

**Greater New Haven Coalition For People, New Haven, CT – January 1990 – May 1993**

Assistant Director – January 1992 – May 1993. Tenant Organizer – Jan. 1990 - January 1992

Supervisor Kathleen Hagerly

- Participated in all operations of grass roots community organizing non-profit.
- Assisted in preparation of grant proposals and reports to secure organizational funding.
- Led tenant-organizing effort including provision of community organizing and training assistance to ten tenant council organizations and two city-wide tenant committees.
- Produced quarterly newsletter and Annual Convention attended by 250 people.
- Acted as liaison to collaborative efforts including the Fighting Back Initiative.

***Accomplishment Highlights***

- Increased participation and impact of annual convention of neighborhood groups.
- Trained leaders to effectively plan strategies, rally allies, and secure favorable decisions from decision-makers.
- Led team of resident leaders in conducting analysis of housing authority work order system and developed recommendations for improvements.

**ADDITIONAL WORK HISTORY – 1986 - 1990**

- Quinnipiac College Child Care, Hamden, CT – Assistant Kindergarten Teacher
- Yale Co-op Medical Book Store, New Haven, CT - Clerk
- Newstand #3 Book and Magazine Store, New Haven, CT – Clerk and shift supervisor
- Ashley's Homemade Ice Cream, New Haven, CT – Store Manager
- Camp Kinderland, Tolland, Mass. - Overnight summer camp waterfront director, CIT leader.

**Training, Awards, Certifications**

- Certificate of Appreciation - Housing Authority of the City of New Haven, April, 1993
- Official Citation, City of New Haven Board of Alderman - April 1993
- Recognition for dedication and commitment to the uplifting and mobilization of the residents of the New Rochelle Municipal Housing Authority - May 1995.
- Department of Housing and Urban Development Trainings - Tenant Opportunity Program (1994), Operation Clean Sweep (1994) and Drug Elimination Program (1997).
- Extra Effort Award, Housing Authority of the City of Pittsburgh - December 2000.
- National Grants Management Association Annual Training Conference ('01, '02).
- National Association of Housing and Redevelopment Officials - Mastering Contract and Procurement Management (2000); Public Housing Manager Certification (2005).
- Numerous meetings and conferences: HUD MTW, NAHRO, CLPHA, PHADA, PAHRA.

**VOLUNTEER ACTIVITIES**

- Coach – Pittsburgh Dynamo Youth Soccer – 2003 – 2006
- Coach – Boys and Girls Club Baseball – 2004 –2007
- Coach – 14<sup>th</sup> Ward Baseball Association – 2008 – Present.
- Reading Is Fundamental Pittsburgh – Board President, 1997 – 2007; Treasurer 2007-2009.

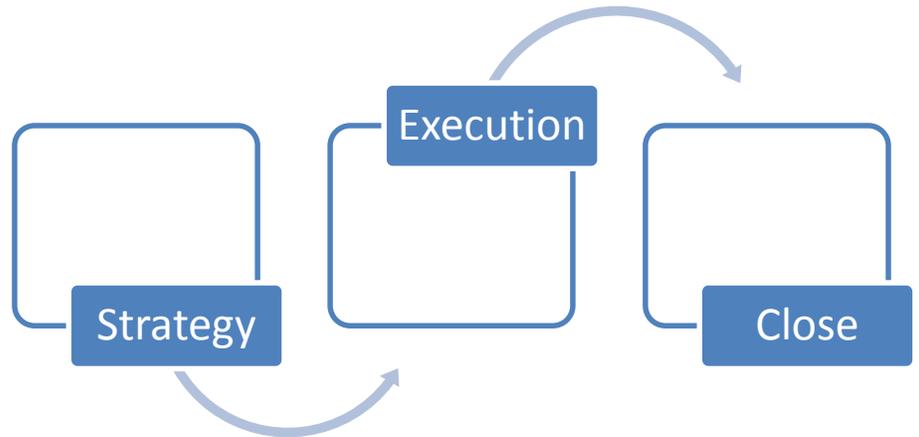
*References furnished upon request.*



## DG&A Approach: Tailored Project Management

Our approach to executive search services is tailored project management.

Every David Gomez & Associates client manager leverages project management software to guide each of our executive search engagements through a proprietary 142 step process. This is conducted in three phases: Strategy, Execution, and Close.



### Phase I: Strategy

#### INITIAL CONSULTATION

Each project begins with a kickoff meeting that includes the Board/Search Committee, DG&A Executive Team Member, and DG&A Project Lead. This step in the process consists of spending time onsite with our clients to build the framework for a successful search by conducting a thorough needs analysis. Our meeting focus is on understanding our client’s operations and objectives, culture, and the technical requirements of the role. We also want to define the dimensions for job success, specific experiences, competencies, knowledge, and personal characteristics required to build a thorough candidate pipeline.

Throughout the process, we find it vital to hold weekly meetings with the Search Committee members to discuss the status, candidate pipeline, changes and any market intelligence gathered.

#### SEARCH DOCUMENTS

We take the information gathered from the kick-off meeting and draft a search overview, role description, and interview guide.

The **search overview**, as seen to the right, is a document that is generated from our project management software. It is a detailed, step by step guide that leads a search committee through an executive search process. In order to successfully complete an engagement in less than 90 days, one of the biggest challenges is keeping everyone aligned and held accountable. Our search overviews allow a search committee the ability to participate by planning ahead for each step along the way.

SEARCH OVERVIEW						
Sun	Mon	Tue	Wed	Thu	Fri	Sat
			1	2	3 RECRUITING COMMENCES	4
5	6 INTERNAL STRATEGY MEETING	7	8	9	10	11
12	13 Send Ideal Candidate to Client via Email for Feedback on Strengths & Opportunities for Improvement	14	15	16	17	18
19	20	21 Update Call w/ Client NEED TIME	22	23	24	25
26	27 Candidate Presentation #1 Emailed to the Client	28 Client Q&A w/ DG&A on Candidates from Presentation #1 NEED TIME	29	30 Candidate Phone Interviews w/ Client From Presentation #1 NEED TIMES	31 Candidate Phone Interviews w/ Client From Presentation #1 NEED TIMES	

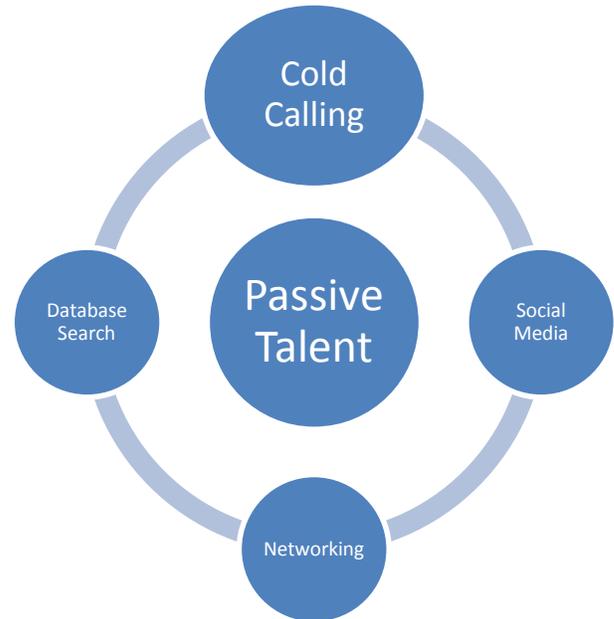
Additionally we help our client’s by recreating their **role descriptions**. We typically find that the versions we receive from our clients do not possess the right information, or they provide too much of the wrong information. While drafting our **role descriptions**, we make sure that we detail the company, department/division, summarize the role, and concisely list requirements, responsibilities, goals, and key challenges of the position.

Once the role description has been developed, we will create an **interview guide** that is comprised of traditional and behavioral based questions. Our traditional questions are asked in all of our engagements and have been perfected over the past 37 years of search work; they ensure there are no snags in the process. The second portion of our interview guides consist of behavioral based interview questions. We feel the most accurate predictor of future performance is past performance and we extract this information from candidates.

## Phase II: Execution

### CHANNELS OF SOURCING

Successful identification of exceptional talent requires active investigation and direct recruitment. Passive talent is focused on driving results for their organizations, so in order to reach them you have to cut through the chaos of daily procedures. We do so by leveraging association networking, the database we built over the last 30 years, social media, and by heavily focusing on cold calling.



### CANDIDATE SCREENING

We carefully screen and qualify all potential candidates to assess their qualifications, potential to perform within the new environment, and organizational compatibility. As potential candidates are identified, they are taken through the following assessments.



## PRESENTING CANDIDATES

After screening candidates, a couple days prior to a face to face meeting, we send a candidate presentation as seen below. During this meeting we outline each recommended candidate’s fit based on work experience, knowledge and skills, personal attributes, competencies, leadership abilities, and cultural fit. We also detail any concerns that we may have about a candidate so that we can consult you in narrowing in on the pool of applicants.



## Search Insights

Insights	Presentation I	Presentation II	Presentation III
Days Open	19	27	54
Candidates Targeted	60	93	294
Candidates Applied	N/A	42	53
Resumes Received	16	36	54
Interviews Conducted	8	19	29
Candidates Presented	4	7	10
Candidates in Queue	8	5	0

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## SEARCH INSIGHTS

Our candidate presentations start by offering our search committees analytics on their search.

One of the metrics we report on is the total number of candidates targeted. This metric is always hyperlinked to a document in the cloud so our clients know exactly who we have targeted during our search efforts.

Insights	Presentation I	Presentation II	Presentation III
Candidates in Queue	8	5	0



## Candidate Matrix

	Andrew	Marc	Larry	Adrienne
Organization	Real Estate Investors Trust (2011-2012) The Public Health Trust – Jackson Health System Executive Director	CBRE Director of Asset Services	(2011-2013) CASTO (2011-2013) Vice President of Commercial Property Management	Travis Commercial Real Estate Services Managing Director of Property Services
Working Title	(2011-2012) Director of Real Estate & Property Management			
Location	Miami, FL	Cincinnati, OH	Westerville, OH	San Antonio, TX
Compensation	Base \$135K 10% Bonus	Base 125K 25% Bonus	Base \$180K 20% Bonus	Base \$135K 15% Bonus
Total Employees (Div. or Org.)	(2011-2012) – 300 (Div.)	115 (Div.)	35 (Div.)	45 (Org.)
Sites/Offices Overseen	(2011-2012) - 108	45	250	5
Certifications	CPM CAM FMP LEED-AP	CCIM – In Progress CPM RPA	CCIM CPM RPA	N/A
Undergrad	BS, Business Administration	BS, Business Administration	BS, Business Management	BA, Biology
Graduate	JD	N/A	N/A	N/A
Resume				
Summary				
Largest Sq. Ft. Managed	16MM Sq. Ft. Office Industrial Retail	11MM Sq. Ft. Office Industrial Retail	30MM Sq. Ft. Office Industrial Retail	
Types of Assets Managed	Multi-Family Medical Office	Commercial	Commercial Multi-Family	
Operations Budget Oversight	\$40MM	\$60MM	\$120MM	
Operations Experience	✓+	✓+	✓+	

## CANDIDATE MATRIX

We then walk through each candidate that we are presenting in matrix form.

This allows our clients to see a side by side comparison on how each candidate compares to one another based on the agreed upon qualifications uncovered during the initial consultation.



### Interview Comment Sheet

**Candidate Name:** REMOVED FOR CONFIDENTIALITY

**Interview Date:** Wednesday, September 3<sup>rd</sup>

For the following questions, please list your answers on a 1 – 5 scale. Key:

- 1 means the candidate was not able to communicate their experience in this area
- 5 means the candidate was able to communicate strong experience with numerous examples
- 3 means the candidate was able to communicate average experience

Functional Skills	Score	Comments
Community Alignment		
Leadership		
Fiscal		
Revenue Generation		
Experience		
Personality		

## SEARCH COMMITTEE INTERVIEW ASSISTANCE

We serve as collaborative advisors to our clients. If requested, we assist our clients with all final interviews and assessments, interview questions and candidate evaluation forms, and consult clients in ranking the candidates interviewed. DG&A has extensive experience working with a variety of search committees. We understand that some searches require extensive community involvement, and our team has the ability to adapt to the needs of all stakeholders involved in a search.

## PHASE III: CLOSE EXTENDING OFFERS

We can assist our clients in offer negotiations. Our strong experience in this stage of the process allows us to effectively and quickly negotiate all components of the offer. We counsel both sides with the compensation package, contractual issues, and other specific details of employment, including relocation. We are in an ideal position to counsel both candidate and client regarding any counter-offer the candidate's current employer may extend.



**CANDIDATE ONBOARDING ASSISTANCE**

Our service extends well beyond the finalized offer. We stay in close contact with all parties during the transition period to address any potential difficulties that may arise as well as to ensure a smooth transition; this occurs with reports at 30, 90, 180, 270, and 365 days after placement.

**SERVICE GUARANTEE**

In the event any individual hired (from DG&A) voluntarily leaves our clients within twelve (12) months of start date, DG&A will reinitiate a search to fill the position at no additional fee.

365 Day Follow Up			
DG&A Rep:		Date:	
		Last Discussion:	

The goal of these discussions is to ensure a smooth onboarding for you. The agenda for this assignment will be to talk through the following points, for me to take notes, send you those notes for final revisions, and then for me to share them with to your boss. Sound good?

DG&A Feedback	
Since our last discussion, how has it been going?	
On a 10 point scale, how would you rank your first 270 days?	
As it is a __, what could be different to make it a 10?	
The last time we spoke, you mentioned the family was taking it well. Is this still the same?	
You also mentioned _____, but that everyone was staying positive. Has anything changed with this?	
The last time we spoke, you mentioned you were trying to achieve XYZ. What success have you achieved with it?	
I saw that your organization had XYZ position posted online, how has it been going? Do you think there are other opportunities for my recruiting team to assist your organization?	



## Proposed Timeline

Throughout the process, DG&A’s staff will play a key role in working with the City of Gunnison’s human resources department to determine what is needed to make this process successful and to work toward timely execution of tasks. This is a proposed timeline that provides an overview of the customized search process and may be modified to fit the CITY OF GUNNISON’s recruitment needs and timeline.

Activity	70 Day Time Line									
	1	2	3	4	5	6	7	8	9	10
	STRATEGY			EXECUTION				CLOSE		
<b>Creating Strategy</b>										
Kick-off Meeting										
Discovery Discussion										
Position Criteria Established										
Core Competencies Established										
Role Description Created										
<b>Name Generation</b>										
Target List Created										
Position Posted										
Targeted Recruiting										
<b>Screening Candidates</b>										
Behavior-Based Interviews										
Cultural Assessments										
<b>Presenting Candidates</b>										
Short List Created										
<b>Search Committee Interviews</b>										
Client Selection of Finalists										
Client Interviews										
<b>Selection</b>										
Preferred Candidate Selection										
Background Checks										
Reference Checks										
<b>Offer</b>										
Negotiation of Final Offer										
<b>Hire &amp; Onboarding</b>										
Acceptance of Offer										
Final Candidate Starts										