

RESOLUTION NO. 2026-3542

A RESOLUTION OF THE TOWN COMMISSION OF THE TOWN OF SURFSIDE, FLORIDA, SELECTING AND APPROVING THE ENGAGEMENT OF STRATEGIC GOVERNMENT RESOURCES (SGR) FOR EXECUTIVE RECRUITMENT SERVICES; AUTHORIZING THE TOWN MANAGER TO NEGOTIATE AND EXECUTE AN AGREEMENT WITH THE FIRM FOR THE SERVICES; PROVIDING FOR AUTHORIZATION, IMPLEMENTATION, AND AN EFFECTIVE DATE.

WHEREAS, the Town of Surfside (the "Town") wishes to engage an executive recruitment firm to provide professional services for recruitment of a permanent Town Manager (the "Services"); and

WHEREAS, the Town issued an informal Request for Executive Recruitment Services on June 5, 2026, although solicitation of professional services is exempt from procurement pursuant to Section 3-13 of the Town's Code; and

WHEREAS, two firms submitted proposals in response to the Request, including Strategic Government Resources and Colin Baenziger & Associates; and

WHEREAS, the Town Commission wishes to select and engage the firm of Strategic Government Resources (SGR) ("Firm") to provide the Services, and authorize the Town Manager and/or Town Officials to negotiate and execute an Agreement with the Firm, consistent with the Firm's Proposal submitted to the Town and attached hereto as Exhibit "A"; and

WHEREAS, the Town Commission finds that the engagement of the Firm for the Services is in the best interest and welfare of the Town.

NOW, THEREFORE, BE IT RESOLVED BY THE TOWN COMMISSION OF THE TOWN OF SURFSIDE, FLORIDA, AS FOLLOWS:

Section 1. Recitals Adopted. That the above-stated recitals are hereby adopted and confirmed.

Section 2. Selection and Engagement of Firm; Authorization. The Town hereby selects and approves the engagement of Strategic Government Resources (SGR) ("Firm") to perform the Services, and authorizes the Town Manager and/or Town Officials to negotiate and execute an agreement with the Firm for the Services, consistent with the Firm's Proposal submitted to the Town and attached hereto as Exhibit "A", subject to the final approval by the Town Attorney as to form and legal sufficiency.

Section 3. Implementation. The Town Manager and/or Town Officials are authorized to take all necessary action to implement the Services and the purposes of this Resolution.

Section 4. Effective Date. That this Resolution shall become effective immediately upon adoption.

PASSED AND ADOPTED on this 24th day of July 2026.

Motion By: Vice Mayor Benmergui

Second By: Commissioner Weingot

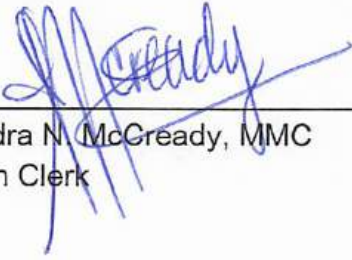
FINAL VOTE ON ADOPTION:

Commissioner Andrea Travani	<u>Absent</u>
Commissioner Gerardo Vildostegui	<u>Absent</u>
Commissioner David Weingot	<u>Yes</u>
Vice Mayor Dayana Benmergui	<u>Yes</u>
Mayor Shlomo Danzinger	<u>Yes</u>



Shlomo Danzinger, Mayor

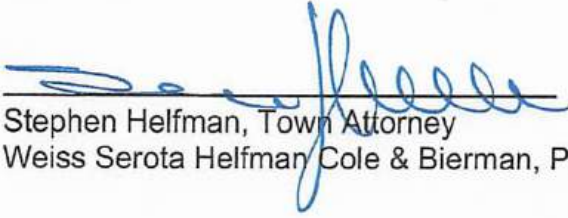
Attest:



Sandra N. McGready, MMC
Town Clerk



Approved as to Form and Legal Sufficiency:



Stephen Helfman, Town Attorney
Weiss Serota Helfman Cole & Bierman, P.L.

PROPOSAL FOR EXECUTIVE RECRUITMENT & INTERIM MANAGEMENT SERVICES

Town of Surfside, Florida

**Town Manager & Interim Chief Operations
Officer**

July 13, 2026

This proposal is valid for 90 days

**Revised Response to Request for Professional
Executive Recruitment Services dated June 5,
2026**



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

Darin Atteberry, Chief Executive Officer
DarinAtteberry@GovernmentResource.com

July 13, 2026

Hon. Mayor Shlomo Danzinger and Town Commission

C/o Sandra N. McCready, Town Clerk

Town of Surfside, Florida

Via email to: SHelfman@wsh-law.com & smccready@townofsurfsidefl.gov



Dear Mayor Danzinger and Town Commissioners,

Strategic Government Resources (SGR) is thankful for the opportunity to submit this revised proposal to assist the Town of Surfside with interim management and executive recruitment services. We appreciate having the opportunity to have both Doug Thomas and Wendle Medford meet with the City on July 1st to present information about SGR and how we could partner with the Town as you consider options for both recruitment and interim services for your community. To that end, please find attached SGR's revised proposal in response to your City Attorney's July 6th email request to submit a more limited scope proposal for placement of an Interim Chief Operating Officer (COO) and to conduct an Executive Recruitment for your permanent Town Manager.

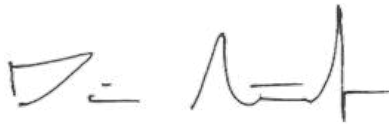
We would like to reiterate some key aspects that set SGR apart from other firms:

1. **Strategic familiarity:** Although the proposed approach of utilizing both interim and recruitment services may be unique to the Town of Surfside, SGR has successfully delivered similar simultaneous interim and recruitment projects in a number of communities including Laredo, Texas, Princeton, Texas, and Kerrville, Texas. This model has enabled SGR to assist communities in filling immediate needs to maintain services and stabilize operations, while ensuring the ability to attract top prospects for key leadership positions. Additionally, SGR's Point of Contact (POC) for the Surfside Project is a former Florida City Manager with 35+ years of local government experience prior to working with SGR for the last 10+ years. As such, SGR has an in-depth understanding of providing municipal services and recruitment activities in Florida's unique operating environment.
2. **Local experience:** Our team brings decades of direct local government experience, giving us an insider's understanding of your unique challenges. We've partnered with over 450 local governments across 37 states, including extensive Florida operating and recruitment experience. Our unique experience provides us with valuable insight into the unique needs of recruiting personnel for your community.
3. **National reach and extensive candidate pipeline:** With over 21,000 LinkedIn followers, 35,000 subscribers to our Servant Leadership e-newsletter, and profession-specific Job Alert subscribers, including nearly 5,000 City/Town Management subscribers, your SGR recruitment will be seen by a vast audience engaged in their professions. Additionally, SGR maintains over 600 qualified local government interim professionals to strategically fill executive leadership gaps in the event that the Town desires other future interim positions.
4. **Active engagement in the profession:** As recognized thought leaders in local government management, we are directly involved in the latest operations, challenges, and best practices. This ongoing engagement ensures we are attuned to the evolving skills and leadership qualities needed in today's local government leaders. In support of such, SGR has a formal partnership with the Florida City/County Management Association (FCCMA) for Manager's in Transition; conducts resume reviews at the FCCMA Annual Conference; is a corporate partner with Business Watch and the Center for Florida Local Government Excellence; and your POC is a regular presenter/speaker regarding trends and Best Management Practices at local government organizations both here in Florida and nationally.

Doug Thomas, Executive Vice President, will serve as your point of contact throughout this engagement. Doug has close to 35 years of senior local government executive management experience prior to working with SGR over the past 10+ years. While Doug is not only the former City Manager of Lakeland, Florida, he has an extensive network of colleagues both in Florida and nationally and has successfully managed over 250 executive recruitments and nearly 30 leadership development engagements with SGR. Wendle Medford, President of Consulting, Embedded, and Interim Services, has over 20 years of municipal and public sector experience. He has elevated SGR as one of the largest public sector interim services firms in the country, with special expertise in municipal management placements. Rebecca Fleury, President of Executive Recruitment, brings over 25 years of experience in local government, including serving 10 years as a City Manager. In her role, Rebecca provides executive oversight over all executive recruitments, ensuring alignment between recruiter expertise and the positions recruited, as well as continuity in organizations with multiple ongoing search engagements.

We are eager to partner with the Town of Surfside as you consider the services outlined in this proposal. We look forward to the opportunity to discuss our proposed services in more detail and are available for a meeting at your convenience. We are also prepared to coordinate either virtual or onsite interviews with the Mayor & Town Commission to meet with any of the candidates we have proposed for your Interim Chief Operating Officer.

Respectfully submitted,

A handwritten signature in dark ink, appearing to read 'Darin Atteberry', with a stylized, flowing script.

Darin Atteberry, Chief Executive Officer

DarinAtteberry@GovernmentResource.com

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Firm Overview and Qualifications

About SGR

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

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

SGR's Core Values are Rooted in Relationships, Driven by Purpose, and Inspired by Excellence.

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

With 21 full-time employees, 21 recruiters, 22 facilitators, and multiple consultants who function as subject matter experts on a variety of projects, SGR offers comprehensive expertise. View all SGR team members and their bios at: GovernmentResource.com/Meet-the-Team

The company operates as a fully remote organization, with team members located in Texas, Arizona, California, Colorado, Florida, Georgia, Maine, Michigan, Montana, Nevada, New York, North Carolina, North Dakota, Ohio, Oklahoma, and South Carolina.

SGR's Unique Qualifications

Interim Management

- SGR is the largest interim services firm in Texas, and one of the largest in the nation, maintaining a candidate pool of more than 600 qualified local government professionals.
- We have been trusted with over 300 quality interim placements and counting.
- Comprehensive background investigations and media searches will be conducted for interim candidates.

Executive Recruitment

- SGR's extensive network identifies exceptional candidates for your local government positions. We utilize diverse channels, including our e-newsletter with over 35,000 subscribers, targeted profession-specific job alerts, our website, SGR's national job board, our 21,000+ subscriber LinkedIn page, along with regional, national, and industry-specific job postings, ensuring a broad reach to candidates.
- SGR implements a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page.
- We frequently collaborate with various local government associations, including the League of Women in Government, Alliance for Innovation, and the National Forum for Black Public Administrators.
- SGR offers a comprehensive screening process designed to ensure a thorough understanding of candidate backgrounds and to minimize surprises. Our full service recruitment includes: prescreening, questionnaires, media reports, reference checks, background investigation reports, and more.

Extensive Network of Prospects & Connections

SGR is intent on being a leader in leadership development, interim management, and executive recruitment. We firmly believe in the importance of proactively building a workforce that reflects the diversity of the communities we serve. SGR has built a diverse and ever-growing network of connections, from executive recruitment and interim candidates to professional coaches and facilitators.

Collective Local Government Experience

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

Proven Track Record of Success

Although unique to the Town of Surfside, SGR has worked successfully with a number of communities for projects similar to what the Town has proposed in the Solicitation for Executive

Recruitment Services requiring interim placements while one or more recruitments are underway. In short, the Town's desired approach tracks similar to what we have undertaken with the Cities of Laredo, Texas, Princeton, Texas, Hutto, Texas, the Economic Development Corporation (EDC) in Kerrville, Texas, and currently underway with the Town in Clarksville, Indiana. As such, our team is experienced in such comprehensive, multifaceted projects, versus firms which have limited or no track record under such a model.

Equal Opportunity Commitment

SGR does not discriminate and believes that equal opportunity is an ethical issue. SGR will not enter an engagement with an entity or organization that directs bias or expects bias to be demonstrated on any basis other than factors that affect the ability of the candidate to do the job. Although SGR cannot guarantee the makeup of recruitment applicants, SGR has relationships and contacts nationwide to encourage the meaningful participation of underrepresented groups, and we continue to evaluate and improve our processes by embedding a lens of equity and inclusion into our recruitment practices.

Listening to Your Unique Needs

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

Trust of Candidates

SGR has a track record of providing remarkable confidentiality and wise counsel to candidates and next-generation leaders, earning their trust. As a result, we can bring exceptional prospects to the applicant pool. Candidates trust SGR to assess the situation accurately, communicate honestly, and maintain their confidentiality to the greatest extent possible and in adherence to Chapter 119 of the Florida Statutes.

Accessibility and Communication

Your Primary Point of Contact for the project will be Doug Thomas, along with Wendle Medford, who will manage interim services. Our team will keep you informed of the status of each engagement, and will be readily accessible. Additionally, both Doug and Wendle maintain communication with active applicants, prospects, and interim professionals, ensuring they are well-informed about the community and the opportunity.

Relevant Experience and References

References

Executive Recruitment:

City of North Port, Florida

Alfred (Jerome) Fletcher, City Manager
jfletcher@cityofnorthport.com
(941) 429-7076

Athens-Clarke County, Georgia

Kelly Girtz, Former Mayor
(706) 369-9457

City of Ormond Beach, Florida

Joyce Shanahan, City Manager
shanahan@ormondbeach.org
(386) 676-3200

City of Lawrence, Kansas

Brad Finkeldei, Mayor
bfinkeldei@lawrenceks.gov
(785) 550-9699

City of Bartow, Florida

Michael Herr, City Manager
mherr@cityofbartow.net
(863) 534-0100

Interim References:

City of Princeton, Texas

Fallan Carillo, Director of Employee Experience
fcarrillo@princetontx.us
(972) 736-2416 Ext. 296

Kerrville Economic Development Corporation (Kerr EDC) /

Kerr Together Long-Term Recovery Group (KTLRG)

Todd Bock, President
kerredc@kerredc.com

Relevant Experience

Interim Services Experience

Interim Services Clients

Aransas County, Texas
City of Addison, Texas
City of Amarillo, Texas
City of Angleton, Texas
City of Anna, Texas
City of Athens, Texas
City of Bastrop, Texas
City of Bedford, Texas
City of Brenham, Texas
City of Bridgeport, Texas
City of Broken Arrow, Oklahoma
City of Burkburnett, Texas
City of Burleson, Texas
City of Cameron, Missouri
City of Canyon, Texas
City of Carrollton, Texas
City of Castroville, Texas
City of Cedar Park, Texas
City of Celina, Texas
City of Cleburne, Texas
City of Colleyville, Texas
City of Dayton, Texas
City of Del Rio, Texas
City of Denison, Texas
City of DeSoto, Texas
City of Dickenson, Texas
Town of Double Oak, Texas
City of Dripping Springs, Texas
City of Dumas, Texas
City of Duncanville, Texas
City of Durango, Colorado
City of El Reno, Oklahoma
City of Ennis, Texas
City of Erie, Colorado
City of Eugene, Oregon
City of Fairview, Texas
City of Fate, Texas
City of Flatonia, Texas
City of Forney, Texas

City of Fort Worth, Texas
City of Fort Smith, Arkansas
City of Freeport, Texas
City of Garland, Texas
City of Georgetown, Texas
City of Glenn Heights, Texas
City of Gonzales, Texas
City of Greenville, Texas
City of Gresham, Oregon
City of Heath, Texas
Town of Highland Park, Texas
Hunt County, Texas
City of Hutto, Texas
City of Irving, Texas
City of Joshua, Texas
City of Keene, Texas
City of Kemah, Texas
City of Keller, Texas
City of Kilgore, Texas
City of Lafayette, Colorado
City of Lago Vista, Texas
City of Lancaster, Texas
City of Laredo, Texas
City of La Marque, Texas
City of La Vista, Nebraska
City of Levelland, Texas
City of Lexington, Texas
City of Llano, Texas
City of Lubbock, Texas
City of Marble Falls, Texas
City of Marshall, Texas
City of McKinney, Texas
City of Miami, Oklahoma
City of Mineral Wells, Texas
City of Missouri City, Texas
City of Moline, Illinois
City of Montgomery, Texas
City of Mount Pleasant, Texas
City of Murphy, Texas

City of New Braunfels, Texas
City of Nacogdoches, Texas
City of North Richland Hills, Texas
North Texas Municipal Water District
City of Oak Point, Texas
City of O'Fallon, Missouri
City of Overton, Texas
City of Palestine, Texas
City of Parkville, Missouri
City of Pecos, Texas
City of Pflugerville, Texas
City of Pilot Point, Texas
City of Plainview, Texas
City of Port Arthur, Texas
City of Princeton, Texas
Town of Providence Village, Texas
City of Quinlan, Texas
City of Richwood, Texas
City of Rockport, Texas
City of Round Rock, Texas
City of Roswell, New Mexico
City of Rowlett, Texas
City of Sachse, Texas
City of Saginaw, Texas
City of South Padre Island, Texas
City of Southlake, Texas
City of Sunnyvale, Texas
City of Superior, Arizona
City of Stephenville, Texas
City of Taylor, Texas
City of Terrell, Texas
City of San Marcos, Texas
City of Seagoville, Texas
City of Sherman, Texas
City of Tomball, Texas
Town of Trophy Club, Texas

City of Weatherford, Texas
 Town of Wellington, Colorado
 City of West Lake Hills, Texas
 City of Wilmer, Texas

City of Winnsboro, Texas
 City of Wolfforth, Texas
 The Woodlands Township, Texas
 Lee County, Florida

Parker County, Texas
 Washington County, Oregon

Interim Services Positions

City Manager
 City Administrator
 Administration Director
 Assistant City Manager
 Assistant to the City Manager
 Assistant Community Services Director Assistant
 Finance Director
 Assistant Fire Chief
 Building Official
 Capital Projects Manager
 Chief Building Official
 Chief Financial Officer
 Chief Information Officer
 City Engineer
 City Secretary
 Community Development Director
 Controller
 CVB Director
 Department of Public Safety
 Disaster Recovery Specialist
 Economic Development Director

Field Operations Superintendent
 Finance Director
 Fire Chief Fire Marshal
 Fixed Based Operations Director
 Human Resources Director
 IA Consulting Development Director
 Information Technology Director
 Library Director
 Municipal Court Administrator
 Neighborhood Services Director
 Parks Construction Manager
 Planning/Community Development Director
 Planning Manager
 Police Chief Police Director
 Public Information Officer/Webmaster
 Public Works Director
 Purchasing Manager
 Risk Manager
 Senior Contract Compliance Specialist
 Street and Storm-water Director
 Utility Billing Manager

Relevant Executive Recruitments

The recruitments listed below are full service executive recruitments, except for those with an asterisk (*) noting a custom or limited scope recruitment engagement.

City & County Management Recruitments, 2023-Present

In Progress

- Palmer Lake, CO (pop. 2,635) – Town Administrator
- Eustis, FL (pop. 26,000) – City Manager
- Giddings, TX (pop. 5,500) – City Manager
- Farmersville, TX (pop. 4,300) – City Manager
- Green Cove Springs, FL (pop. 10,000) – City Manager
- Independence, MO (pop. 123,000) – City Manager

- Iowa Colony, TX (pop. 17,200) – City Manager
- Lisbon, ME (pop. 9,800) – Town Manager *
- Madisonville, TX (pop. 4,630) – City Manager
- Olathe, KS (pop. 149,000) – City Manager
- Richlands, VA (pop. 5,260) – Town Manager
- Clarksville, IN (pop. 22,250) – Town Manager
- Mulberry, FL (pop. 4,700) – City Manager

2026

- Annapolis, MD (pop. 40,000) – City Manager

- Azle, TX (pop. 15,000) - City Manager
- Bowie, MD (pop. 58,000) - City Manager
- Ketchikan, AK (pop. 8,200) - City Manager/Ketchikan Public Utilities General Manager
- Lawrence, KS (pop. 98,000) - City Manager
- La Vista, NE (pop. 16,746) - City Administrator
- Milton-Freewater, OR (pop. 7,000) - City Manager *

2025

- Waco, TX (pop. 140,000) - City Manager
- Ottawa, KS (pop. 12,630) - City Manager
- Portland, OR (pop. 650,000) - City Administrator
- Wadena County, MN (pop. 14,400) - County Administrator
- Aledo, TX (pop. 7,000) - City Manager
- Abilene, TX (pop. 125,000) - City Manager
- Argyle, TX (pop. 6,000) - Town Administrator
- Athens-Clarke County Unified Government, GA (pop. 130,000) - County Manager
- Battle Creek, MI (pop. 52,700) - City Manager
- Biddeford, ME (pop. 22,300) - City Manager
- Blaine, MN (pop. 75,900) - City Manager
- Bonner Springs, KS (pop. 7,600) - City Manager
- Cameron, MO (pop. 8,300) - City Manager
- Canadian, TX (pop. 2,300) - City Manager
- Chester County, PA (pop. 557,000) - County Administrator/CEO
- Clay County, MO (pop. 260,000) - County Administrator
- Dundee, FL (pop. 5,700) - Town Manager
- Elgin, TX (pop. 12,800) - City Manager
- Finney County, KS (pop. 38,000) - County Administrator
- Florence, CO (pop. 3,800) - City Manager
- Garden Ridge, TX (pop. 5,000) - City Manager
- Heath, TX (pop. 10,400) - City Manager
- Jonestown, TX (pop. 2,500) - City Administrator
- La Junta, CO (pop. 7,200) - City Manager
- Lamar, CO (pop. 7,700) - City Administrator
- North Central Texas Council of Governments (NCTCOG), TX - Executive Director
- Oak Point, TX (pop. 6,000) - City Manager
- Pacific, MO (pop. 7,800) - City Administrator
- Plainview, TX (pop. 20,000) - City Manager
- Sedalia, MO (pop. 22,000) - City Administrator
- Springfield, MO (pop. 170,200) - City Manager

- Stevenson, WA (pop. 1,600) - City Administrator
- Trinidad, CO (pop. 8,100) - City Manager

2024

- Brunswick, ME (pop. 21,800) - Town Manager
- Coffeyville, KS (pop. 8,800) - City Manager
- Des Moines, WA (pop. 32,400) - City Manager
- Duncan, OK (pop. 23,000) - City Manager
- DuPont, WA (pop. 10,200) - City Administrator
- Edwardsville, KS (pop. 4,700) - City Manager
- Leander, TX (pop. 67,000) - City Manager
- Leavenworth, KS (pop. 37,600) - City Manager
- Manhattan, KS (pop. 55,000) - City Manager
- Marysville, KS (pop. 3,500) - City Administrator
- Medford, OR (pop. 90,900) - City Manager
- Miami, OK (pop. 12,200) - City Manager
- New Rochelle, NY (pop. 80,800) - City Manager
- New Smyrna Beach, FL (pop. 32,400) - City Manager
- Orono, ME (pop. 11,400) - Town Manager
- San Juan County, WA (pop. 18,600) - County Manager
- St. Joseph, MO (pop. 72,000) - City Manager
- Topeka, KS (pop. 125,500) - City Manager
- Treasure Island, FL (pop. 6,500) - City Manager

2023

- Camp Verde, AZ (pop. 12,000) - Town Manager
- Cleburne, TX (pop. 33,000) - City Manager
- Bristol, TN (pop. 27,000) - City Manager
- Dobbs Ferry, NY (pop. 11,000) - Village Administrator
- Gatesville, TX (pop. 16,000) - City Manager
- Glastonbury, CT (pop. 35,000) - Town Manager
- Great Bend, KS (pop. 15,000) - City Administrator
- Justin, TX (pop. 5,000) - City Manager
- Lafayette, CO (pop. 30,000) - City Administrator
- Laredo, TX (pop. 256,000) - City Manager
- Largo, FL (pop. 84,000) - City Manager
- Lawton, OK (pop. 90,000) - City Manager
- Mexia, TX (pop. 7,000) - City Manager
- Nassau Bay, TX (pop. 5,000) - City Manager
- Navajo County, AZ (pop. 106,000) - County Manager
- Ottawa, KS (pop. 12,500) - City Manager
- Parker, AZ (pop. 3,500) - Town Manager
- Rowlett, TX (pop. 68,000) - City Manager
- Shawnee, KS (pop. 69,000) - City Manager

- Snoqualmie, WA (pop. 14,000) - City Administrator
- Snyder, TX (pop. 11,000) - City Manager

- Stillwater, OK (pop. 48,000) - City Manager
- Trophy Club, TX (pop. 13,000) - Town Manager
- Williston, ND (pop. 29,000) - City Administrator

Finance Recruitments, 2023-Present

In Progress

- Amarillo, TX (pop. 200,000) – Chief Financial Officer
- Elgin, TX (pop. 12,800) - Finance Director
- Missouri City, TX (pop. 88,000) - Chief Financial Officer
- Mount Pleasant, TX (pop. 16,200) - Finance Director*
- Mid-Continent Public Library, MO – Finance Director
- Kansas City Public Library, MO – Chief Financial Officer

2026

- Austin Transit Partnership (Austin, Texas) (pop. 961,000) – Senior Vice President, Financial Services
- Harris County ESD No. 48, TX (pop. 150,000) – Finance Director
- Marshall, TX (pop. 23,400) - Director of Finance
- Plainview, TX (pop. 20,000) – Director of Finance*
- Wasilla, AK (pop. 9,435) – Finance Director

2025

- Austin Transit Partnership (Austin, Texas) (pop. 961,000) – Vice President of Accounting
- Benton County, OR (pop. 97,000) - Chief Financial Officer
- Greenville, TX (pop. 34,300) - Director of Administrative Services/Finance Director*
- Greenwich, CT (pop. 63,000) - Chief Financial Officer - Comptroller
- Johnson County, KS (pop. 622,200) – County Auditor
- Juvenile Welfare Board of Pinellas County (Pinellas County, FL) – Director of Accounting/Controller
- Largo, FL (pop. 83,000) – Chief Performance Officer
- Melissa, TX (pop. 25,000) – Finance Director

- Novi, MI (pop. 66,000) – Chief Financial Officer*
- Port Arthur, TX (pop. 57,000) - Controller

2024

- Argyle, TX (pop. 5,750) - Finance Director
- Clermont, FL (pop. 47,500) - Finance Director *
- Fairfield, CT (pop. 959,700) - Chief Fiscal Officer
- Greenville Electric Utility System, TX - Business Services Director *
- Highland Park, TX (pop. 8,900) - Director of Finance *
- Independence, MO (pop. 123,000) - Finance Director
- Lubbock, TX (pop. 267,300) - Chief Financial Officer
- Mustang Special Utilities District, TX - Financial Services Manager *
- North Richland Hills, TX (pop. 80,000) - Director of Finance
- Pasadena, TX (pop. 152,000) - City Controller
- Plainview, TX (pop. 20,000) - Chief Financial Officer *
- Spring Fire Department, TX (pop. 168,000) - Finance Director
- Terrell, TX (pop. 19,000) - Senior Budget Analyst *
- Texas City, TX (pop. 55,600) - Director of Finance
- Wichita Falls, TX (pop. 103,000) - Chief Financial Officer *

2023

- Amarillo, TX (pop. 200,000) - Purchasing Manager *
- Astoria, OR (pop. 10,000) - Finance & Administrative Services Director
- Brentwood, MO (pop. 8,000) - Finance Director
- Brookings, SD (pop. 24,000) - Chief Financial Officer *
- Brushy Creek Municipal Utility District, TX (pop. 23,000) – Controller

- Cedar Hill, TX (pop. 49,000) - Director of Finance*
- Fort Worth Employees' Retirement Fund, TX - Executive Director
- Green Cove Springs, FL (pop. 8,000) - Finance Director
- Humble, TX (pop. 17,000) - Finance Director *
- Hutto, TX (pop. 40,000) - Finance Director
- Laredo, TX (pop. 256,000) - Financial Services Director
- Nederland, TX (pop. 19,000) - Finance Director
- Port Arthur, TX (pop. 57,000) - Director of Finance
- Pueblo City-County Library District, CO (pop. 170,000) - Chief Financial Officer
- Richardson, TX (pop. 122,000) - Director of Finance
- Shawnee, KS (pop. 70,000) - Finance Director *
- Smith County ESD 2, TX - Senior Accountant
- Sunnyvale, TX (pop. 8,500) - Assistant Town Manager/CFO
- Sweetwater, TX (pop. 11,000) - Finance Director*
- The Colony, TX (pop. 45,000) - Finance Director

Public Works, Utilities, Engineering, and Capital Improvement Program (CIP)/Project Managers Recruitments, 2023-Present

In Progress

- Abilene, TX (pop. 125,000) - City Engineer
- Charlotte County, FL (pop. 212,000) - Utilities Director
- Fayetteville, AR (pop. 103,100) - Engineering Development Review Manager *
- Hutto, TX (pop. 43,000) - City Engineer
- Laredo, TX (pop. 256,000) - Assistant Director, Water & Wastewater Plants *
- Laredo, TX (pop. 256,000) - Assistant Director, Operations & Field Services *
- Lamar, CO (pop. 7,700) - Deputy Public Works Director
- Marshall, TX (pop. 23,400) - Public Works Director
- Moline, IL (pop. 42,000) - Assistant Director of Utilities
- North Texas Tollway Authority (NTTA), TX - Traffic Engineer
- North Texas Tollway Authority (NTTA), TX - Assistant Director of Traffic Incident Management
- North Texas Tollway Authority (NTTA), TX - Director of Project Delivery
- Thornton, CO (pop. 146,700) - Engineering and Capital Projects Director
- Ormond Beach, FL (pop. 45,000) - Public Works Director

2026

- Springfield Utility Board, OR - General Manager
- Bell County, TX (pop. 370,000) - County Engineer
- Grapevine, TX (pop. 51,300) - Engineering Manager *
- Laredo, TX (pop. 256,000) - Assistant Director, Operations & Field Services *
- Temple, TX (pop. 100,000) - Director of Fleet Services *

2025

- Argyle, TX (pop. 5,750) - Public Works Director
- Bartow, FL (pop. 20,000) - Utilities Director
- Bee Cave, TX (pop. 9,100) - City Engineer *
- Durango, CO (pop. 56,600) - Assistant Public Works Director/Utilities
- Flagler Beach, FL (pop. 5,300) - City Engineer *
- Greenville, TX (pop. 29,600) - Public Works Director *
- Lake Region Lakes Management District, FL - District Manager
- Laredo, TX (pop. 256,000) - Utilities Director
- Nassau County, FL (pop. 101,500) - Utility Authority Executive Director *
- Port Arthur, TX (pop. 57,000) - Director of Public Services/City Engineer
- Richardson, TX (pop. 120,000) - Assistant Director of Engineering/Capital Projects *

- Safford, AZ (pop. 10,300) - Utilities Director *
- Sedalia, MO (pop. 22,000) - City Engineer
- Sunnyvale, TX (pop. 9,100) - Assistant Town Engineer *
- Van Alstyne, TX (pop. 8,900) - Public Works Director *

2024

- Amarillo, TX (pop. 200,000) - Director of Utilities
- Brownsville, TX (pop. 186,700) - Director of Engineering & Public Works *
- Chester County, PA (pop. 540,000) - Public Services Director
- Fort Worth, TX (pop. 900,000) - Property Management Director
- Greenville, TX (pop. 30,000) - Public Works Director *
- Gulf Shores, AL (pop. 16,000) - City Engineer
- Indian River County, FL (pop. 165,000) - Public Works Director
- Manhattan, KS (pop. 55,000) - Director of Utilities
- North Texas Municipal Water District, TX - Engineering Manager
- North Texas Municipal Water District, TX - Water Treatment Systems Manager
- Olathe, KS (pop. 152,500) - Assistant City Engineer *
- Richardson, TX (pop. 122,570) - Director of Engineering and Capital Projects
- Waco, TX (pop. 140,000) - Capital Division Manager *
- Wake County, NC (pop. 1,000,000) - Director of General Services Administration
- West Central Texas Municipal Water District, TX - General Manager
- Wichita Falls, TX (pop. 103,000) - Deputy Director of Public Works

Florida Recruitments, 2023-Present In Progress

- Charlotte County, FL (pop. 224,000) - Utilities Director
- Clearwater, FL (pop. 120,000) - City Attorney
- Eustis, FL - City Manager
- Jupiter, FL - Fire Service Recruitment Services *

2023

- Bay City, TX (pop. 18,000) - Public Works Director
- Cameron, MO (pop. 8,000) - Public Works Director
- Cherokee Water Company, TX - General Manager
- Fort Worth, TX (pop. 900,000) - Transportation and Public Works Director
- Grand Prairie, TX (pop. 200,000) - Utility Director *
- Klamath Falls, OR (pop. 22,000) - Assistant City Engineer *
- Lake Jackson, TX (pop. 28,000) - Assistant City Engineer *
- Lubbock, TX (pop. 266,000) - Assistant Director of Water Utilities
- Lubbock, TX (pop. 266,000) - Director of Facilities Management
- Moline, IL (pop. 42,000) - Director of Public Works
- North Texas Municipal Water District - Assistant Deputy-Wastewater
- Olathe, KS (pop. 152,000) - Assistant City Engineer/Transportation Manager *
- Richardson, TX (pop. 122,000) - Director of Facilities and Fleet
- San Juan County, WA (pop. 19,000) - Fleet Services Director
- Terrell, TX (pop. 18,000) - Director of Utilities
- Waco, TX (pop. 140,000) - Utilities Capital Projects Division Manager *
- Waco, TX (pop. 140,000) - Utilities Plant Operations Manager *
- Waco, TX (pop. 140,000) - Wastewater Treatment Plant Superintendent *
- Westminster, CO (pop. 119,000) - City Engineer
- Westminster, CO (pop. 119,000) - Public Works and Utilities Director

2026

- Green Cove Springs, FL - Finance Director
- Green Cove Springs, FL - City Manager
- Ormond Beach, FL (pop. 43,074) - Public Works Director

- Hollywood, FL - Senior Asst. City Attorney - Hollywood, FL
- Estero, FL (pop. 37,000) - Deputy Village Manager
- Bartow, FL (pop. 22,000) - Deputy Chief of Police

2025

- Juvenile Welfare Board of Pinellas County, FL (pop. 959,107) - Director of Accounting/Controller
- Largo, FL (pop. 83,000) - Chief Performance Officer
- Highlands County, FL (pop. 109,778) - County Engineer *
- Sarasota County Tax Collector, FL - Deputy Tax Collector *
- Dundee, FL (pop. 5,700) - Town Manager
- Bartow, FL (pop. 20,000) - Utilities Director
- Hollywood, FL (pop. 153,000) - City Attorney
- Lake Region Lakes Management District, FL - District Manager
- North Port, FL (pop. 94,700) - City Attorney
- The School Board of Polk County, FL - General Counsel
- North Port, FL (pop. 94,700) - Police Legal Advisor
- Estero, FL (pop. 36,000) - Assistant Community Development Director

2024

- Nassau County, FL (pop. 101,500) - Assistant Planning Director *
- Nassau County, FL (pop. 101,500) - Planning Department *

- Nassau County, FL (pop. 101,500) - Utility Authority Executive Director *
- Indian River County, FL (pop. 165,559) - Public Works Director
- Flagler Beach, FL (pop. 5,300) - City Engineer *
- Bartow, FL (pop. 20,000) - Police Chief
- Indian River County, FL (pop. 165,559) - County Attorney
- Santa Rosa Island Authority, FL - Executive Director
- New Smyrna Beach, FL (pop. 32,400) - City Manager
- Treasure Island, FL (pop. 6,500) - City Manager
- Clermont, FL (pop. 47,456) - Finance Director *
- DeLand, FL (pop. 39,000) - Information Technology Director *
- Indian River County, FL (pop. 165,559) - Assistant County Administrator - Infrastructure & Development Services
- Indian River County, FL (pop. 165,559) - Natural Resources Director *
- Plant City, FL (pop. 40,367) - Fire Chief
- Green Cove Springs, FL (pop. 9,800) - Finance Director

2023

- North Port, FL (pop. 81,823) - Assistant City Attorney
- Winter Haven, FL (pop. 83,000) - Airport Director
- Bartow, FL (pop. 20,000) - Human Resources Director
- Largo, FL (pop. 84,000) - City Manager

Proposed Approach and Methodology

Comprehensive Strategy: Leadership Stabilization and Organizational Transition

Overview

The Town of Surfside's Request for Executive Recruitment Services and the findings of the Town Assessment Report present a clear opportunity to strengthen the Town's leadership structure, organizational capacity, and long-term institutional resilience.

The Assessment Report concludes that the Town of Surfside continues to provide high-quality services and maintain day-to-day operations; however, the organization remains vulnerable to leadership turnover, limited organizational depth, succession planning challenges, and dependence on key individuals. While these conditions do not represent a crisis, they create organizational risk that can affect long-term performance, continuity, and strategic execution.

SGR recommends an integrated leadership stabilization and organizational transition strategy designed to address both immediate operational needs and long-term leadership objectives. By combining Interim Services and Executive Recruitment resources, SGR can help the Town maintain continuity, strengthen organizational capacity, and recruit exceptional leaders who will support Surfside's future success.

SGR anticipates that the parties will enter into a Master Agreement to initially cover the Interim Chief Operating Officer and Town Manager Recruitment as outlined in this proposal, with the possibility of adding other potential Interim appointments and/or Executive Recruitment services as needed and/or desired by the Town in future months.

Strategic Objectives

SGR's approach is designed to:

- Maintain operational continuity during leadership transitions.
- Strengthen organizational capacity and institutional resilience.
- Reduce risk associated with leadership turnover and key-person dependencies.
- Support implementation of Commission priorities and strategic initiatives.
- Recruit and retain exceptional executive and departmental leadership.
- Facilitate knowledge transfer and succession planning.
- Build a cohesive leadership team capable of long-term organizational success.

Current Organizational Considerations

The Town Assessment Report identifies several themes that will influence both interim leadership deployment and permanent recruitment efforts:

- Significant workforce and leadership turnover over the past two years.
- The need for greater organizational depth in key operational areas.
- Reliance on individual institutional knowledge rather than documented systems.
- Ongoing capital improvement, infrastructure, and operational initiatives.
- The importance of strengthening long-term strategic execution capacity.
- A newly elected Commission seeking experienced professional leadership and organizational stability.

These considerations require a coordinated approach that balances immediate operational needs with long-term organizational development.

Integrated Leadership Solution

Organizational Stabilization

SGR's Interim Services Team can provide experienced local government professionals who maintain operational continuity, address immediate leadership gaps, support ongoing initiatives, and assist with organizational stabilization efforts. Interim leaders serve as transition resources while helping preserve momentum, support staff, and reduce organizational disruption.

Executive Recruitment

SGR's Executive Recruitment Team will work with the Town to identify and recruit an exceptional permanent Town Manager who possesses the skills, experience, and leadership characteristics necessary to guide Surfside through its next phase of development.

Leadership Profile Priorities

While SGR and the City would collaborate on defining the position profile, we anticipate emphasizing candidates who demonstrate:

- Experience leading organizations through transition and change.
- Success building institutional capacity and sustainable systems.
- Strong financial, operational, and strategic management expertise.
- Effective collaboration with elected officials and community stakeholders.
- A commitment to employee development and organizational culture.
- The ability to balance immediate operational needs with long-term objectives.

Transition and Long-Term Success

Successful leadership transitions extend beyond candidate placement. SGR remains actively engaged throughout onboarding and transition activities to support relationship-building, knowledge transfer, organizational alignment, and long-term success.

Our objective is not simply to fill gaps, but to help Surfside build a durable leadership structure

capable of sustaining performance, strengthening institutional capacity, and successfully implementing the Town's strategic priorities for years to come.

Conclusion

The Town of Surfside's current environment presents an opportunity to strengthen leadership capacity while building a more resilient and sustainable organization. Through an integrated combination of interim leadership support and executive recruitment services, SGR provides a coordinated solution that addresses both immediate operational needs and long-term organizational goals.

By aligning leadership stabilization, recruitment, and transition planning within a single strategy, SGR can help Surfside navigate its current transition while establishing a strong foundation for future success.

Interim Services

Interim Leadership

Interim Chief Operations Officer

The Town has identified the need for an experienced interim executive to support the Acting Town Manager and provide operational oversight during the recruitment process.

Responsibilities may include:

- Day-to-day operational leadership
- Department director coordination
- Strategic initiative implementation
- Organizational assessment support
- Transition planning and continuity management
- Support for Commission priorities and objectives

Interim Services Methodology

Overview

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

1. Selection of Interim Candidate

- Finalize Candidate Selection
- Conduct Comprehensive Media Search
- Complete Background Investigation

2. Onboarding Process

- Finalize Assignment Details
- Notify Interim Candidate of Assignment Commencement

3. Assignment Period

- Check-ins to Ensure Client Satisfaction

4. Conclusion of Assignment

- Close Assignment

Step 1: Selection of Interim Candidate

- **Finalize Candidate Selection:** Once you have approved the interim candidate of your choice, SGR will notify the selected candidate.
- **Conduct Comprehensive Media Search Report:** These media reports are compiled by utilizing our proprietary media search process, including variations of the candidates' names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Comprehensive Media Report typically ranges from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts, etc.
- **Comprehensive Background Investigation Reports:** Through SGR's partnership with a licensed private investigations company, we are able to obtain a comprehensive background screening reports that include detailed information such as:
 - Social Security number trace
 - Address history
 - Driving history/motor vehicle records
 - Credit report
 - Federal criminal search
 - National criminal search
 - County wants and warrants
 - Global homeland security search
 - Sex offender registry search
 - State criminal search (for current and previous states of residence)
 - County criminal search (for every county in which the candidate has lived or worked)
 - County civil search (for every county in which the candidate has lived or worked)
 - Education verification
- Due to the personal nature of the report, the actual background report will not be given to your organization; however, your organization will be notified of any issues discovered.

Step 2: Onboarding Process

SGR will work with you and the selected candidate so the assignment can begin quickly.

- **Finalize Assignment Details:** SGR will finalize the details of the assignment, including location, start date, responsibilities, and any other necessary information.
- **Notify Candidate of Assignment Commencement:** SGR will notify the candidate of his/her selection and provide them with all of the information they will need to begin the assignment.

Step 3: Assignment Period

It is important that you are completely satisfied with the candidate selected for the interim position. If at any time, you feel like the candidate is not the right fit for your organization, SGR

will provide another interim candidate that meets your expectations.

- **Check-ins:** SGR will conduct check-ins with all parties to ensure that you are satisfied with the work being performed.

Step 4: Conclusion of Assignment

Once the interim assignment is concluded, SGR will coordinate with your organization to close out the contract.

- **Close Assignment:** At the conclusion of the assignment, SGR will coordinate with your organization and the interim on the final work day. SGR will obtain the final time sheet from the interim candidate, and your organization will perform any exit processes necessary with the interim candidate.

Client Satisfaction Survey: SGR works very hard to deliver exceptional customer service and it is important that we receive honest and objective feedback from our clients. We may ask you to complete a client satisfaction survey and discuss any feedback and suggestions you may have that will help us in our goal of continuous process improvement.

Interim Service Guarantee

SGR guarantees that you will be satisfied with the interim candidate placed with your organization. If at any time, you do not feel like the candidate is the right fit for your organization, SGR will provide another interim candidate who meets your satisfaction, pending availability of suitable candidates.

Executive Recruitment

Executive Recruitment Approach

Phase One: Leadership Assessment and Recruitment Planning

Before launching executive recruitments, SGR will work with the Commission, Acting Town Manager, interim leadership resources, and key stakeholders to develop a comprehensive understanding of the Town's leadership needs, organizational priorities, governance expectations, and long-term objectives.

This phase focuses on:

- Identifying critical leadership competencies.
- Assessing organizational priorities and challenges.
- Evaluating the leadership structure and executive team needs.
- Establishing recruitment priorities and sequencing considerations.
- Developing position profiles and candidate criteria.

Outcome:

A recruitment strategy aligned with the Town's organizational needs, strategic priorities, and future leadership vision.

Town Manager Recruitment

The Town Manager recruitment represents the Town's most significant long-term leadership investment and serves as the cornerstone of the Town's future leadership structure.

Recruitment efforts will focus on identifying candidates with demonstrated experience in:

- Complex municipal management.
- Organizational development and capacity building.
- Strategic planning and execution.
- Capital improvement and infrastructure oversight.
- Financial stewardship.
- Governance and elected official relations.
- Leading organizations through transition and change.

Throughout this process, SGR will continue monitoring organizational developments and emerging leadership needs to ensure alignment between the selected candidate and the Town's evolving priorities.

Outcome:

Selection of a Town Manager capable of providing strategic leadership while strengthening institutional capacity and organizational resilience.

Full Service Recruitment: Methodology

Our Full Service recruitment includes comprehensive stakeholder input, recruitment and application management, interview and candidate evaluation services, stakeholder engagement and facilitation, as well as candidate negotiation and hiring support.

A full-service recruitment typically entails the following steps:

1. Organization/Position Insight and Analysis

- Project Kickoff Meeting and Develop Anticipated Timeline
- Stakeholder Interviews and Listening Sessions
- Develop Recruitment Brochure

2. Recruitment Campaign and Communication with Candidates

- Advertising and Marketing
- Sourcing Passive and Active Candidates
- Communication with Prospective and Active Applicants
- Communication with Active Applicants

3. Initial Screening and Review by Executive Recruiter

4. Search Committee Briefing to Review Applicant Pool and Select Semifinalists

5. Evaluation of Semifinalists

- Written Questionnaires
- Recorded Semifinalist Interviews
- Media Searches

6. Search Committee Briefing to Select Finalists

7. Evaluation of Finalists

- Background Investigation Reports
- DiSC Management Assessments (if desired, supplemental cost)
- First Year Plan or Other Advanced Exercise
- Press Release Announcing Finalists (if requested)

8. Interview Process

- Face-to-Face Interviews
- Stakeholder Engagement (if desired)
- Deliberations
- Reference Checks (may occur earlier in the process)

9. Negotiations and Hiring Process

- Determine the Terms/Conditions of an Employment Offer
- Negotiate Terms and Conditions of Employment
- Press Release Announcing New Hire (if requested)

Optional: Complimentary Leadership Development Workshop (Town Manager Search)

Optional: Post-Hire Services (supplemental cost)

Step 1: Organization/Position Insight and Analysis

Project Kickoff Meeting and Develop Anticipated Timeline

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

Stakeholder Interviews and Listening Sessions

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

Develop Recruitment Brochure

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

View sample recruitment brochures here: GovernmentResource.com/Open-Recruitments

Step 2: Recruitment Campaign and Communication with Candidates

Advertising and Marketing

The Executive Recruiter and the client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, with a reach of over 35,000 subscribers in all 50 states, will announce your position. Additionally, we will send targeted emails to opt-in subscribers of SGR's Job Alerts, and your position will be posted on SGR's website and Job Board. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page. Furthermore, we will provide a recommended list of ad placements to be approved by the client, targeting the most effective venues for reaching qualified candidates for that particular position.

Sourcing Passive and Active Candidates

SGR's innovative recruitment strategies are designed to give our clients a competitive edge in attracting and retaining top-tier talent. By employing a dual approach of passive and active candidate sourcing, we tap into a broader talent pool that includes high-caliber professionals who may not be actively job-seeking. Our advanced technology and deep industry connections enable us to identify candidates with the precise skills and cultural fit for your organization. We

round out sourcing efforts through personalized candidate engagement and outreach with a constant focus on transparency and relationship building.

Communication with Prospective Applicants

SGR maintains regular communication with interested prospects throughout the recruitment process. Outstanding candidates often conduct thorough research on the available position before submitting their resumes. As a result, we receive a significant number of inquiries, and it is crucial for the executive search firm to be well-prepared to respond promptly, accurately, and comprehensively, while also offering a warm and personalized approach. This initial interaction is where prospective candidates form their first impression of the organization, and it is an area in which SGR excels.

Communication with Active Applicants

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personalized responses to any questions or inquiries. SGR maintains frequent communication with applicants to ensure they remain enthusiastic and well-informed about the opportunity. Additionally, SGR communicates with active applicants, keeping them informed about the organization and community.

Step 3: Initial Screening and Review by Executive Recruiter

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

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

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

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

Step 5: Evaluation of Semifinalists

The review of resumes is a crucial step in the executive recruitment process. However, resumes may not fully reveal an individual's personal qualities and their ability to collaborate effectively

with others. In some instances, resumes might also tend to exaggerate or inflate accomplishments and experience.

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

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

Written Questionnaires

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

Recorded Semifinalist Interviews

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

Media Searches

Our media search process involves web-based and social media research, enabling efficient and thorough vetting of candidates and minimizing the risk of overlooking critical information. These media reports have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any “red flags” or noteworthy media coverage to the Search Committee as part of the review of semifinalists with the Search Committee.

Step 6: Search Committee Briefing to Select Finalists

Prior to this briefing, SGR will provide the Search Committee with links to the recorded online interviews and a briefing book on the semifinalist candidates. The briefing book includes cover letters, resumes, and completed questionnaires. The objective of this meeting is to narrow the

list to finalists who will be invited to participate in onsite interviews.

Step 7: Evaluation of Finalists

Background Investigation Reports

Through SGR's partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below.

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

DiSC Management Assessments (if desired, supplemental cost)

SGR utilizes the DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment provides a comprehensive analysis and report on the candidate's preferences in five crucial areas: management style, directing and delegating, motivation, development of others, and working with their own manager.

For assessments of more than two candidates, a DiSC Management Comparison Report is included, offering a side-by-side view of each candidate's preferred management style.

First-Year Plan or Other Advanced Exercise

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

Step 8: Interview Process

Face-to-Face Interviews

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

Stakeholder Engagement

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

Deliberations

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

Reference Checks

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

Step 9: Negotiations and Hiring Process

Determine the Terms/Conditions of an Employment Offer

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

Negotiate Terms/Conditions of Employment

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

Press Release (if requested)

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

Satisfaction Surveys

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

Complimentary Leadership Development Workshop (Town Manager Search Only)

As part of our commitment to ensuring long-term success, SGR is pleased to offer a complimentary, four-hour, leadership development workshop for your organization within 12 months of the successful completion of the Town Manager executive search. SGR Executive Recruitment clients would be responsible for the travel costs associated with facilitation only—no professional fee (a cost savings of up to \$4,750)! Leadership development workshops are designed to support the newly appointed Manager and foster a servant leadership culture within your team, enhancing collaboration and alignment across the organization. Standard leadership development workshops include the following topics:

- Creating a Servant Leadership Culture
- Governance
- Team Building
- Strategic Planning
- Strategic Visioning

Post-Hire Services

We offer additional post-hire services such as executive coaching, team-building retreats, and performance review assistance at the six-month or one-year mark. For more information or to request a customized proposal, please email training@governmentresource.com or visit GovernmentResource.com/leadership-and-professional-development/leadership-development-services/.

Full Service Recruitment: Terms and Conditions

- The organization agrees not to discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- The organization agrees to refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- The organization agrees to provide SGR with any candidates that were previously accepted as applicants for the given position before engaging SGR to conduct the recruitment for the subject position.
- If the organization wishes to place ads in local, regional, or national newspapers, the organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.

Full Service Recruitment: Placement Guarantee

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

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

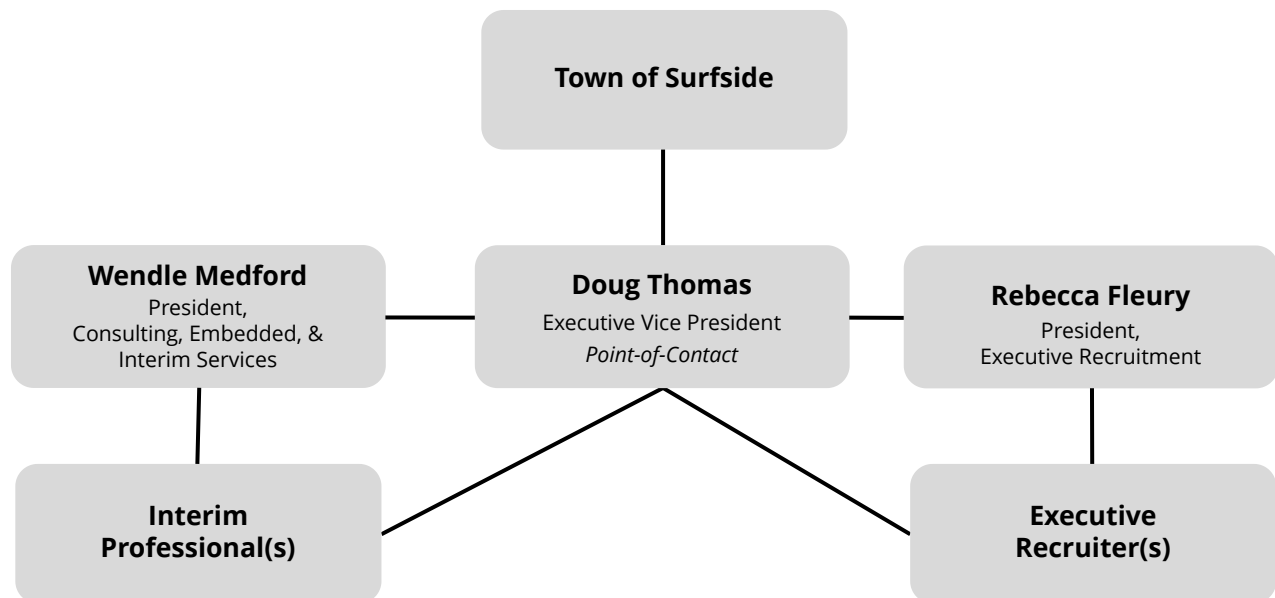
If your organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the placement guarantee will be null and void. Additionally, SGR does not provide a guarantee for candidates placed as a result of a partial recruitment effort or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

Proposed Organizational Structure

Organizational Structure for Engagement

The primary point of contact for this engagement will be Doug Thomas, Executive Vice President. Doug will work closely with Wendle Medford and Rebecca Fleury to coordinate both Interim Services and Recruitment Services for the Town, as well as coordinate any additional services requested by Town. The Interim Services and Recruitment Services will be directly led by the Interim Professionals and Executive Recruiters selected in collaboration between SGR and the Town.

A representative organizational chart for this engagement has been included below.



Project Personnel

**Doug Thomas, Executive Vice President
Recruitment & Leadership Development**

Role: Point-of-Contact

Email: DouglasThomas@GovernmentResource.com

Phone: 863-860-9314



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

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

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

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

**Wendle Medford, President
Consulting, Embedded, and Interim Services**

Role: Executive Oversight & Management - Interim Services

Email: WendleMedford@GovernmentResource.com

Phone: 817-753-3157



Wendle Medford is a seasoned leader with over 20 years of experience in both municipal and private sector leadership. As President of Consulting, Embedded, and Interim Services at SGR, Wendle leads the successful delivery of interim management services and consulting projects for over 700 local governments across 47 states.

Wendle's career is marked by a series of executive leadership roles, including city management, where he has driven strategic growth and innovation in high-growth communities across North Texas. He combines a deep business acumen with technical expertise, ensuring the advancement of public services through the integration of advanced technology, process optimization, and a commitment to transparency and digital democracy.

A U.S. Air Force veteran, Wendle was recognized as a Distinguished Graduate by the U.S. Air Force Air Education and Training Command for his outstanding academic achievements. He holds both a Bachelor of Business Administration and a Master of Public Administration degrees, and has earned certifications as a Certified Public Manager (Texas State University) and a Certified Government Chief Information Officer (University of North Carolina at Chapel Hill), and is a graduate of the University of Oklahoma's Economic Development Institute. Additionally, Wendle is an alumnus of Leadership North Texas.

**Rebecca L. Fleury, President
Executive Recruitment**

Role: Executive Oversight & Management - Recruitment Services

Email: RebeccaFleury@GovernmentResource.com

Phone: 269-207-6104



Rebecca Fleury joins SGR as President of Executive Recruitment, after serving in a Facilitator role. She brings more than 25 years of public service experience to her role.

Rebecca has served in a variety of positions in her local government career and prides herself on always keeping “community” at the forefront of her endeavors. She recently retired as the city manager of Battle Creek, Michigan, where she was the longest serving city manager in that city’s history. She specializes in the fields of public finance and budgeting, public safety, community and economic development, and grants and project management.

Her approach in all situations is characterized by her commitment to transparency, inclusivity, and results-driven outcomes. As an experienced facilitator with a proven record of guiding elected officials and leadership teams through challenging situations, Rebecca works to address the immediate needs of an organization while also helping an organization’s leaders ensure its goals align with its long-term vision. She has also successfully led strategies to find top talent and attract the next generation of municipal leaders.

A comprehensive understanding of local government operations, combined with a dedication for community service, makes Rebecca an asset to any organization seeking to enhance its leadership capabilities. Her commitment to public service and those who make their careers as public servants is evident in her ability to build durable relationships with clients, stakeholders, and candidates alike.

In addition to serving on various boards at local, state, and national levels during her career, she is also a member of the International City/County Management Association (ICMA), a Credentialed Manager through ICMA, and a past president of the Michigan Municipal Executives, ICMA’s state association in Michigan. She has also served as an adjunct professor in the field of public administration and continues to conduct presentation for undergraduate and graduate classes.

Rebecca holds a bachelor’s degree in education and master’s degree in public administration, both from Western Michigan University.

Executive Recruiters

With over 20 executive recruiters with decades of local government experience, SGR brings a full roster of practitioners across city and town management, public safety, finance, public works and transportation, among others. Each recruiter brings unique networks, skillsets, and expertise, supported by the proven SGR recruitment process and dedicated team.

Interim Professionals

SGR maintains a candidate pool of more than 600 qualified local government professionals across all municipal professions. Each interim professional has a proven track record of success, with invaluable experience to fill crucial executive gaps. As a leader in interim services, we attract elite talent in the local government market, ensuring you are presented with the most qualified professionals for the role.

For the **Interim Chief Operations Officer** position, SGR has prepared a slate of four interim professionals for the Town's consideration. The interim professionals are as follows:

- Cheryl Harrison-Lee, Ph.D.
- Marie Peoples, Ph.D.
- Jessica Carpenter
- Peggy Castaño

Their cover letters and resumes are included on the following pages.

Cheryl Harrison-Lee, Ph.D.

Harrison-Lee Development Consulting, LLC

ICMA Credentialed Manager | AICP | Harvard Kennedy School Senior Executive | Ph.D., Education and Behavioral Studies

July 9, 2026

Mr. Wendle Medford
SGR
P.O. Box 1642
Keller, TX 76244

Re: Interim Chief Operating Officer

Dear Mr. Medford:

There are moments in the life of a municipality when what is needed is not a manager but a builder — someone who can step into an organization navigating simultaneous challenges across finance, operations, governance, and culture, and bring the experience, discipline, and genuine commitment to public service required to move it forward. I am writing to offer that leadership to the Town of Surfside. With thirty years of executive experience in Florida and across the country, AICP and ICMA Credentialed Manager credentials, a doctorate in Education and Behavioral Studies, and a career defined by turning organizational complexity into operational strength, I am prepared to serve as the Interim Chief Operating Officer and to work in partnership with your Town Manager and governing body to build a high performance organization at the Town of Surfside.

In reviewing the Town's organizational assessment, three findings stand out as both urgent and addressable. The first is the state of financial controls and audit readiness — a condition I have addressed in multiple engagements by rebuilding internal control structures, correcting deficiencies, and preparing organizations for external audit with the rigor that protects both the institution and the public trust. The second is the absence of a strategic plan and standard operating procedures — an organization without documented direction or administrative infrastructure depends entirely on individuals rather than systems, and I have built both from the ground up in cities, counties, and consulting engagements across three decades. The third is the leadership development needs of a largely new staff. Developing a high-performance team through evidence-based coaching and leadership programming is among the most distinctive capabilities I bring.

My experience with municipal finance and internal controls is deep and immediately applicable. I have managed budgets from \$16 million to \$432 million, received the Government Finance Officers Association Distinguished Budget Presentation Award repeatedly, and chaired the Finance Committee of the Kansas Board of Regents — providing executive oversight of financial reporting, audit readiness, and fiscal accountability across public institutions. Through Harrison-Lee Development Consulting I have led financial operations reviews, assessed and restructured internal control frameworks, hired and managed interim finance staff, and prepared organizations for external audit.

Building organizational infrastructure from the ground up is work I have done more than once. As Interim County Administrator of Wyandotte County, Kansas, I stepped into a 2,300-employee organization during a time of significant operational challenges and immediately established governance frameworks, standard operating procedures, and accountability structures across departments. Through my consulting practice I have developed policies and procedures manuals, restructured operational workflows and built the administrative infrastructure that transforms good

intentions into reliable daily practice. I have also facilitated community and staff visioning sessions — working with chambers of commerce, advisory boards, and civic groups — to build a shared strategic direction and community vision.

Building a high-performance team from a new or transitional workforce is one of the most consequential investments an organization can make — and one of the areas where my background is most distinctive. As City Administrator of Gardner, Kansas, I built a high-performance organizational culture from the ground up, earning the ICMA Certificate of Excellence for Performance Management and customer satisfaction results exceeding 80 percent of national city benchmarks. I served on the Executive Committee leading Florida's Sterling Award process — the Baldrige-based framework for organizational excellence. I have served as an executive coach for public sector leaders nationally and designed and delivered multi-week leadership development programs grounded in personality assessments, StrengthsFinder, and foundational leadership frameworks. My doctorate in Education and Behavioral Studies grounds this work in behavioral theory and evidence-based practice.

Two additional dimensions of my background bear directly on Surfside's needs. As an American Institute of Certified Planners credential holder educated at the University of Florida and formed professionally in Florida municipalities — including the City of Orlando, the Florida Department of Transportation, Ormond Beach, Titusville, and Daytona Beach — I bring unmatched planning oversight and Florida statutory compliance expertise. I understand Comprehensive Plan requirements, land development regulation consistency obligations, and the compliance calendar that municipalities with contracted planning functions are most at risk of missing. And as a former City Administrator who has sat in the chair, I bring genuine executive peer partnership to your Town Manager — not just operational implementation support but the trusted senior advisor support that helps navigate the full organizational picture, make sound judgments under pressure, and develop the town for the future.

Florida formed me. Educated at the University of Florida and launched across Florida municipalities, I developed my belief in what good local government can do for people in communities up and down this state. I carried that belief to Kansas, built on it through thirty years of executive leadership, completed my doctorate, and built a consulting practice grounded in everything this career has taught me. Coming back to Florida — to a resilient waterfront community that deserves strong, experienced, and deeply committed leadership — is not simply a professional opportunity. It is personal. It is the reason I got into this work in the first place, and I am ready to give it everything I have.

I welcome the opportunity to discuss this engagement further.

Respectfully submitted,

Cheryl Harrison-Lee, Ph.D.

Principal, Harrison-Lee Development Consulting, LLC
ICMA Credentialed Manager | AICP

Cheryl Harrison-Lee, Ph.D.

VISIONARY | STRATEGIC | EXECUTIVE

CONTACT INFO:

PERSONAL SUMMARY:

With 30+ years of experience in a variety of corporate, entrepreneurial, private and public environments, I have extensive experience as a strategic business partner. My leadership journeys have allowed me to develop a thorough understanding of balancing agency goals and financial resources, administration, process enhancements, program development, and organizational excellence.

I am a collaborative executive leader who can build trusting relationships and inspire employee commitment at all levels to achieve outstanding results. I have consistently been recognized for my ability to anticipate organizational requirements and initiate and execute creative solutions.

Throughout my career, I have successfully led large and small cross functional teams in achieving success throughout the project life cycle. My teams have developed numerous process enhancements and successfully implemented them in an innovative and sustainable way. This work has resulted in cost savings and revenue growth as well as yielding a significant competitive advantage.

ACADEMICS:

Harvard Kennedy School of Government

- Senior Executives in State and Local Government

Harvard Bloomberg Cities Leadership Program

The Honor Society of Phi Kappa Phi

Wichita State University

- Doctor of Philosophy (Ph.D.)
Education and Behavioral Studies

University of Florida

- M.A., Urban and Regional Planning
Concentration: Public Administration

University of South Carolina

- B.A., Journalism

CORE SKILLS:

Strategic Planning, Infrastructure Development, Financial Analysis, Administration and Leadership, Business Strategy, Organizational Effectiveness, Project Management, Vendor and Public Relations, Training and Development, Marketing and Communications, Change Management.

CAREER MILESTONES:

Leadership Accomplishments

- Developed strategic funding priorities, established management and financial systems for disbursing \$1.034B CARES allocation throughout the State of Kansas to address impacts of COVID-19.
- Oversight of implementation strategies including toolkit, webinars, templates and financial reporting for 105 counties statewide on ways to expend \$1B for recovery from COVID-19.
- Transformation to high performance organization resulting in Customer Survey results exceeding metro area cities and national cities in over 80 percent of the categories, and established Performance-Based Merit Compensation Program.
- Established new concept of priority-based budgeting resulting in local, state and national recognition.
- Led efforts to develop city's vision, mission, core values and adoption of strategic plan to include new award winning performance management dashboard implementation.
<https://icma.org/certificates-performance-management>
- Added to the tax base advancing one million square foot Amazon facility.
- Led revenue enhancement effort and contract negotiations for \$838M Homefield development (youth sports and multi-sports facilities and Margaritaville Hotel)
- Oversight of Rock Island Bridge development agreements, \$12M entertainment district on the river in Kansas (world's first entertainment district over a river)
- Technical advisor for City of KCMO Central City Sales tax projects representing over \$500M in investments.
- Completed Memorandum of Understanding for 2 million square foot industrial park development consisting of between 1,500 and 5,000 new jobs.
- Initiated capital facility study, negotiated land acquisition and oversight of financing approvals for construction of new Justice Center.
- Oversight for \$16 million Wastewater Treatment Plant.
- Completed Information Technology Assessment/Disaster Recovery Plan and revised the City's entire infrastructure network to ensure business continuity and safeguard the City operations.
- Prepared strategic plan for economically distressed area utilizing \$100M tax proceeds for neighborhood revitalization, workforce development, and blight elimination.

Business Acumen

- Led development of strategy for disbursement of \$700M of CARES funding to address COVID-19 recovery in less than 60 days for 105 counties.
- Prepared \$432 million budget for city and county operations. (Received Distinguished Budget Award)
- Established UG Forward, a comprehensive high performance organizational strategy.
- Prepared \$207 million budget and contributed to 8.2% reduction in expenditures.
- Developed plans and financing strategy for LYMMO Downtown Circulator System.
- Adoption of Fiscal Integrity Ordinance establishing reserve, debt management and investment policies.
- Implemented cost-cutting measures and presented budget with over 60% increase to the General Fund reserves (largest contribution to reserve fund since inception).
- Completed several Human Resources Initiatives including new Employee Engagement Survey, Pay and Compensation Study, and development of organizational Career Ladders.
- Negotiated contract for purchase and sale of over 100 acres with County School Board, creating economic development opportunities.
- Conducted energy audit on all organizational facilities and secured Energy Efficiency and Conservation Grant for facility upgrades expected to yield annual utility savings.
- Secured and monitored federal grants to upgrade downtown road network to meet ADA standards and renovate Senior Center.
- Developed comprehensive employee benefits package, resulting in health care cost savings and increased employee benefits to include medical, increased life insurance and disability.
- Implemented digital magazine to enhance customer service and technology with Parks and Recreation Activity Guide and 2014 Annual Budget as pilot projects.

Cheryl Harrison-Lee, Ph.D.

VISIONARY | STRATEGIC | EXECUTIVE

CERTIFICATIONS:

- International City Management Association, **Credentialed Manager**
- American Institute of Certified Planners (AICP), **Certificate Number 019203**

ACTIVITIES:

- Chair, **Retirement Plan Committee** (2021-2023)
- Chair, **Kansas Board of Regents** (2021-2022)
- Chair, Future of Higher Education Council (2020)
- Kansas Board of Directors, **Midwest Public Risk** (2013-2018)
- Ex-Officio Board Member, Southwest Johnson County Economic Development Council (2012-2018)
- Strategic Planning Task Force, International City Management Association (2014-2016)
- International City Management Association (2009-present)
- Governmental Affairs and Policy Committee, International City County Management Association (2010-2013)
- Rotary Club of Oviedo (2012)
- Vice-President, Maitland Area Chamber of Commerce, Board of Directors (2009-2012)
- Design and Construction Advisory Group, **University of Florida**, College of Building (2010-2012)
- Planning Advisory Group, **University of Central Florida**, Department of Public Administration (2010)

HONORS:

- "Central Florida's Up & Coming," Black Family Today Magazine, 1999
- International Transit Studies Fellow, Transportation Research Board, Eno Foundation 1999
- Distinguished Alumnus, University of Florida Award, 1998
- Career Watch, Essence Magazine, June 1998
- Leadership Central Florida and Leadership Orlando Graduate
- Board of Regents Fellow, University of Florida

AWARDS:

- **American Planning Association**, Outstanding Public Outreach and Project
- **Harvard Bloomberg Cities**
- **Engineering Excellence Award**, ACEC of Kansas
- **Certificate of Excellence for Performance Management**, International City Managers Association
- **Certificate of Achievement for Excellence in Financial Reporting**, Government Finance Officers Association
- **Distinguished Budget Presentation Award (3 years)**, Government Finance Officers Association
- **Blue Chip Award**, Blue Cross Blue Shield
- **Innovation Recreation Program Award**, Kansas Parks and Recreation

CAREER MILESTONES CONTINUED:

Visionary / Strategic Planning

- Completed Capital Improvements Element; Land Acquisition and Infill Housing Neighborhood Revitalization Program; Water Supply Plan; Draft Citizen Participation Plan; and Impact Fee Ordinance for fire, police, parks, general government and transportation.
- Initiated Riverfront Master Plan and developed draft Urban Mixed Use Entertainment Zone in community redevelopment area.
- Conducted higher education strategic plans, organizational assessments and implementation action plans.
- Prepared Universal Studios Master Plan.
- Developed Traffic Circulation and Mass Transit Elements of Comprehensive Plan.
- Established statewide model for infrastructure development consistent with growth.
- Led economic development efforts which included approval of Daytona Live Project (\$855 million overall economic impact; 2,400 new jobs; \$2.8 million impact fees; \$16.1 million local taxes) and Wal-Mart Supercenter (350 new jobs).
- Developed \$1.4 million Gateway Design features for major roadway.
- Automated Permits and Licensing Department, including Interactive Voice Response (IVR) System.
- Established framework for annexation of 6,500 acres with adoption of Growth Management Strategy Plan.
- Adoption of Economic Development Strategy Plan and Economic Development Incentive Policy resulting in over \$200 million of committed private investment in 2017.
<http://www.gardnerkansas.gov/home/showdocument?id=687>
- Developed performance management dashboard aligned with new brand, G3 "Gardner Guarantees Greatness".
- Completed CCED Economic Development Strategic Plan. Initiated Wyandotte County Economic Development Strategic Plan.
- Developed Capital Improvements Element 20 year Infrastructure Plan resulting in site being included for Kansas City Metro Area for Amazon HQ2.

Community Engagement / Collaboration

- Established and provided technical support for Executive and Steering Committees for CARES Funding on priority areas of connectivity, education, health and economic development.
- Convened extensive budget communication sessions and budget simulator for enhanced citizen engagement.
- Facilitated planning and visioning forum for Council resulting in adoption of strategic goals.
- Established civility in local government principles through development and adoption of Governing Body Policies and Procedures.
- Created mass communication system for emergency management and community updates.
- Negotiated 2,000-acre development agreement with state planning agencies.
- Developed Sales Tax Financing Strategy for infrastructure achieving voters' approval of over \$10 million based on assessment and evaluation of current conditions.
- Established organization's vision, mission, and core values in conjunction with leadership team combined with branding and community imaging efforts.

EXPERIENCE

- Principal, Harrison-Lee Development Consulting, LLC, 2018 - Present
- Interim County Administrator, Wyandotte County, 2022-2023
- Executive Director Office of Recovery, State of Kansas, 2020 (temporary grant)
- City Administrator, City of Gardner, Gardner, Kansas, 2012 - 2018
- Chief Administrator Officer, Town of Eatonville, Eatonville, Florida, 2009 - 2011
- Deputy City Manager, City of Daytona Beach, Daytona Beach, Florida, 2005 - 2009
- Executive Director of Community Development, City of Titusville, Titusville, Florida, 2005
- Senior Planner, City of Ormond Beach, Ormond Beach, Florida, 2004 - 2005
- Central Florida Regional Transportation Authority, Orlando, Florida, 2002 - 2003
- District Manager, Florida Department of Transportation, Orlando, Florida, 1995 - 2002
- Chief of Growth Management, (Promoted) City of Orlando, Orlando, Florida, 1990 - 1995

MARIE PEOPLES, PHD, ICMA-CM

CITY MANAGER



Dear Mr. Medford,

I am writing to express my interest in serving as Interim Chief Operating Officer for the Town of Surfside. Acting Town Manager Mario A. Díaz has produced a remarkably thorough assessment that gives the Mayor and Commissioners a strong foundation for informed decision-making. My experience leading organizations through operational transition, emergency events, and system-level improvements positions me well to support Surfside as it builds on the work already underway.

The report identifies systemic risks, limited institutional knowledge, and significant workforce turnover. I have led organizations through similar conditions by strengthening governance frameworks, documenting procedures, and building succession structures so operations are not dependent on individual employees. I am accustomed to environments where capital projects, regulatory obligations, and staffing transitions converge, and where operational triage and long-range improvements must advance at the same time.

In Webster Groves, I directed the full development and implementation of the City's Stormwater Master Plan and led the completion and adoption of the Comprehensive Plan—the first update since 1978. I rebuilt the Planning and Development Department, codifying standard operating procedures and practical “how-to” guidance to strengthen institutional knowledge. I also modernized internal operations by updating governance systems, improving cross-department coordination, and implementing a five-year budget forecasting model for all funds. I brought a stalled firehouse project back on track, resolving design and budget issues and guiding it through successful completion.

As Deputy County Manager for Coconino County, I oversaw major capital and organizational initiatives, including the full lifecycle of constructing a new Medical Examiner Facility. I served as Incident Commander during countywide emergency operations, leading responses to flooding, wildfires, and severe winter storms, and I led the Criminal Justice Coordinating Council. I was responsible for a \$198 million annual budget and more than 800 staff.

Surfside's workforce has continued to deliver services despite turnover and structural gaps, and the staff resilience is evident. I would be honored to support the organization by stabilizing operations and strengthening teams during this transition, and if selected, I would commit to serving a full two-year period to provide continuity while the Town strengthens its institutional systems and prepares for long-term leadership. I also maintain long-standing professional ties with respected Miami leaders, including recently retired Chief of Police Manny Morales and North Miami Chief of Police Cherise Gause—connections that would support my integration into the local professional network. I appreciate your consideration and am available to provide any additional information you may need.

Sincerely,

A handwritten signature in black ink that reads "Marie Peoples". The signature is fluid and cursive, with a long horizontal stroke at the end.

Marie Peoples, PhD, ICMA-CM

MARIE PEOPLES, PHD, ICMA-CM

EXECUTIVE PROFILE (CITY MANAGER/CONSULTANT)

Highly accomplished and respected **Municipal Executive** and trusted advisor with progressive leadership experience leading full-service local government operations, including oversight of **budgets up to \$198M** and workforces exceeding **800 staff**. Proven track record of **stabilizing organizations, eliminating structural deficits**, and advancing complex, voter-approved initiatives and long-range infrastructure strategies.

Recognized for **navigating complex political environments**, aligning elected officials and stakeholders, and delivering results across governance, operations, and community priorities. Brings deep expertise in labor relations, collective bargaining, and intergovernmental coordination.

Differentiated by a strong **background in public health and emergency management**, including serving as Incident Commander during COVID-19 and leading major crisis response efforts. Known for clear communication, steady leadership, and maintaining alignment and public trust during periods of change.

Areas of Expertise: Executive Leadership | Fiscal Stewardship and Budget Oversight | Strategic Planning and Execution | Municipal Operations Management | Organizational Transformation | Governance and Policy Implementation | Intergovernmental Relations | Board and Commission Oversight | Community-Centered Service Delivery | Labor Relations and Collective Bargaining | Crisis and Emergency Management | Capital Planning and Infrastructure Strategy | Equity-Focused Leadership | Resident and Stakeholder Communication

PROFESSIONAL EXPERIENCE

Peoples Consulting, LLC; Webster Groves, MO

May 2011 – Present

Independent City Consultant (City Manager Transition) | \$30M Annual Budget; 24K+ Population; 150 Staff

Provide executive advisory support during transition to new City Manager, ensuring continuity of operations, governance alignment, and sustained momentum across strategic, operational, and organizational priorities.

Strategic Impact:

- Advise Mayor and City Council on governance, policy direction, and organizational priorities during leadership transition.
- Maintain progress on active capital projects, long-range planning efforts, and cross-departmental initiatives.

City of Webster Groves, MO

Jan 2021 – Apr 2026

City Manager | \$30M Annual Budget; 24K+ Population; 150 Staff

Served as the chief executive officer for a full-service municipality, leading all operations, advising the Mayor and City Council, and ensuring fiscal stability, policy execution, and delivery of equitable public services within a highly complex political and community environment.

Strategic Impact:

- Eliminated a multi-million-dollar structural deficit through a Council-approved austerity plan.
- Secured voter approval of Proposition W, a \$22.1M bond initiative for critical infrastructure and community investment.
- Spearheaded a City-wide public education campaign that secured voter approval of a Use Tax, generating \$1M+ in annual revenue.
- Delivered major capital projects—including a signature aquatic center and new fire station—and directed long-term infrastructure planning through the Facilities Master Plan and Capital Improvement Plan.
- Negotiated labor agreements with Fire and Police unions, strengthening workforce stability and labor relations.
- Led development of the City's first Comprehensive Plan since 1978, establishing long-term strategic direction.
- Advanced Stormwater Master Planning, establishing a 20-year funding and infrastructure framework.
- Directed a citywide charter revision initiative, achieving voter approval of all 10 amendments.

Coconino County, Flagstaff, AZ

Dec 2018 – Jan 2021

Deputy County Manager | \$198M Annual Budget; 144K+ Population; 800+ Staff

Served as a senior executive advisor to the County Manager and Board of Supervisors, overseeing a multi-department portfolio and leading complex operational, policy, and intergovernmental initiatives across one of the nation's largest counties.

Strategic Impact:

- Led integration of three departments into a unified structure, improving efficiency, resource utilization, and service delivery.
- Oversaw performance, compliance, and fiscal management across health, community services, courts, and justice systems.
- Advanced long-range capital planning, including Facilities Master Plan and Capital Improvement Plans.
- Navigated high-risk, politically sensitive issues involving legal matters, public safety, and community impact.
- Directed cross-jurisdictional partnerships with Tribal Nations and federal/state agencies across public health, justice, and community services.
- Served as Incident Commander for the County's COVID-19 response, leading coordinated emergency operations across a geographically complex region.
- Founded **Stronger As One**, a countywide mental health and suicide prevention initiative, building cross-sector partnerships.

Coconino County Public Health Services District, Flagstaff, AZ

Oct 2013 – Dec 2018

Chief Health Officer / \$16M Annual Budget; 144K+ Population; 130+ Staff

Directed a comprehensive public health system serving a large, diverse, and geographically dispersed population, overseeing all divisions, emergency response, and cross-jurisdictional partnerships while advising elected leadership on public health policy and strategy. Led full organizational transformation, strengthening performance, accountability, and organizational culture across all public health divisions.

Strategic Impact:

- Eliminated multimillion-dollar structural deficits through data-driven decision-making and operational restructuring.
- Secured \$3.5M in funding and led end-to-end development of a new Medical Examiner facility, completed on time and within budget.
- Directed responses to major public health and environmental crises, including Hantavirus outbreaks, plague cases, wildfires, and post-wildfire flooding.
- Strengthened partnerships with Tribal Nations, rural communities, and intergovernmental agencies to expand access and improve outcomes.
- Advanced equity-focused public health strategies across diverse and underserved populations.

Previous Work Experience:**Interim Human Resources Director** | Coconino County Human Resources Department, Flagstaff, AZ | Feb 2017 – Jul 2017**Director of Public Health** | Cole County Health Department, Jefferson City, MO | Oct 2010 – Oct 2013**Chief of Primary Care & Rural Health** | Missouri Department of Health & Senior Services, MO | Jun 2007 – Oct 2010**Certified Advanced Online Facilitator & Doctoral Chair** | University of Phoenix, AZ | Jan 2004 – Jun 2025

EDUCATION & CERTIFICATES

Ph.D. in Public Health Epidemiology (2011); MPH (2008) | Walden University, Minneapolis, MN**MA in Sociology & Criminal Justice (2000)** | Lincoln University, Jefferson City, MO**BA in Criminal Justice Administration (1998)** | Columbia College, Columbia, MO**Certificates:****ICMA Credentialed Manager (ICMA-CM)**, Apr 2026**Executive Certificate in Public Leadership** | Harvard Kennedy School, Jun 2025**Empowering Black Leaders** | Harvard Kennedy School, Jun 2025**Leadership Decision Making Program** | Harvard Kennedy School, Sep 2024**Senior Executive in State and Local Government Certificate** | Harvard Kennedy School, Jul 2019**Elected Member, District Governing Board** | Coconino Community College, Flagstaff, AZ | 2015 – 2021**Elected Member, Jefferson City Board of Education** | Jefferson City, MO | 2010 – 2013

Jessica Carpenter

July 10, 2026

Wendle Medford

President of Consulting, Interim, and Embedded Services
Strategic Government Resources (SGR)
P.O. Box 1642
Keller, TX 76244

Re: Town of Surfside, FL-Interim Chief Operating Officer

Dear Mr. Medford,

Surfside is at an important moment in its history. The Town is not seeking someone simply to maintain operations. It is seeking an executive capable of strengthening institutional capacity, restoring organizational resilience, executing critical infrastructure priorities, and building a management culture that will serve the community well into its second century. The assessment prepared for the Commission makes that challenge abundantly clear, and it is precisely the type of leadership environment where I have built my career.

Throughout more than twenty years of executive leadership in local government, I have led organizations through financial recovery, organizational restructuring, infrastructure investment, development pressure, audit remediation, and complex political environments. My experience spans executive management, finance, planning, development services, public works coordination, capital improvement programs, economic development, and organizational transformation. I have managed multibillion dollar capital programs, directed complex municipal departments, advised elected officials, and successfully aligned diverse stakeholders around long term strategic priorities while maintaining exceptional public service.

What particularly attracted me to Surfside is that the challenges identified in your organizational assessment mirror many of the environments where I have produced measurable results. My leadership philosophy is built on creating sustainable systems rather than dependence on individuals. I develop organizations that continue performing regardless of leadership transitions by strengthening internal controls, documenting processes, implementing performance management systems, developing succession plans, and building strong executive teams.

My background aligns closely with the priorities before the Commission:

- Stabilizing finance operations while strengthening internal controls, audit readiness, budget management, and long range financial planning.

- Leading capital improvement programs involving transportation, utilities, public facilities, drainage, and infrastructure renewal.
- Directing planning, building, permitting, code enforcement, environmental compliance, floodplain management, and development review operations.
- Building collaborative relationships with elected officials while providing objective, professional recommendations on complex policy issues.
- Improving organizational performance through strategic planning, operational assessments, performance metrics, and executive accountability.
- Securing grants, leveraging outside funding, and identifying innovative financing strategies to maximize community investment.
- Leading organizations through periods of transition while maintaining employee engagement and restoring confidence throughout the organization.

Most recently, I prepared a comprehensive First 90 Days Transition Action Plan that translates the Town's operational assessment into a sequenced implementation strategy focused on stabilizing finance operations, addressing critical infrastructure risks, establishing governance accountability, restoring organizational depth, and creating measurable performance reporting for the Commission. That plan reflects exactly how I approach executive leadership: listening first, validating information independently, prioritizing risk, sequencing initiatives realistically, and providing elected officials with transparent progress they can measure.

Earlier in my career, I directed Development Services for the City of Midland, Texas, one of the fastest growing communities in the nation during the Permian Basin expansion. I later served as Community and Economic Development Director for Island County, Washington, where I led planning, permitting, building, code enforcement, environmental review, and FEMA floodplain compliance. As Capital Programs Executive Finance Director for the Washington State Department of Transportation, I provided executive financial oversight for a \$7.4 billion statewide transportation program, supporting some of the Pacific Northwest's most significant infrastructure investments. More recently, I have served in executive finance leadership for King County Parks and currently as Interim Finance Consultant for the City of Marble Falls, Texas, where I am rebuilding financial controls, implementing standard operating procedures, strengthening audit readiness, and improving long term organizational resilience.

I also recognize that Surfside's future extends beyond resolving today's operational challenges. As your assessment notes, the Town faces significant long term decisions involving infrastructure renewal, resiliency, coastal investment, comprehensive planning, governance continuity, and community vision. Those initiatives require an executive who understands both daily municipal operations and long range strategic implementation. They require someone who

can build trust with residents, earn the confidence of the Commission, empower department directors, and ensure that today's decisions strengthen the Town for decades to come.

I would welcome the opportunity to discuss how my experience can help Surfside strengthen its organizational foundation, execute its strategic priorities, and provide the stable, accountable leadership your Commission and residents deserve.

Thank you for your time and consideration. I look forward to speaking with you.

Respectfully,

Jessica Carpenter

JESSICA CARPENTER

EXECUTIVE PROFILE

Executive development services and community development leader with 25 years of experience directing fully integrated municipal departments across city, county, state, and tribal governments. Proven expertise serving as Director over current and long-range planning, building, plan review, permitting, inspections, code enforcement, environmental compliance, and zoning administration. Extensive background aligning land use regulation, infrastructure capacity, capital improvement programming, and economic development strategy to support high growth communities. Recognized for modernizing development codes, improving permitting timelines, and ensuring legally defensible regulatory frameworks while facilitating complex private development. Trusted advisor to elected officials, executive leadership, planning commissions, developers, utilities, and regulatory agencies.

CORE EXECUTIVE COMPETENCIES

Development Services Administration Environmental and Regulatory Compliance

Current and Long-Range Planning	NEPA and SEPA Environmental Review
Planning and Zoning Regulation	Floodplain Management and FEMA NFIP
Building Permitting and Plan Review	Brownfields and Environmental Remediation
Inspections and Code Enforcement	Shoreline and Critical Areas Compliance
Comprehensive Planning	Geographic Information Systems
Development Review and Entitlements	Intergovernmental Coordination
Capital Improvement Planning	Public Private Partnerships
Infrastructure Coordination	Bond Funded Capital Delivery

PROFESSIONAL EXPERIENCE

King County Department of Natural Resources and Parks – Parks Division

Interim Finance, Budget and Planning Manager | King County (Population ~2,300,000)

July 2025 to January 2026

- Provided executive leadership integrating capital planning, land stewardship, environmental compliance, and infrastructure delivery across a countywide parks system
 - Directed a \$640 million biennial operating and capital budget supporting facilities, shoreline environments, and public access infrastructure
 - Coordinated environmental compliance, shoreline management, and alignment with county development regulations and land use policies
 - Advised executive leadership on asset management, capital prioritization, and infrastructure investment tied to growth and sustainability
 - Ensured compliance with levy restrictions, bond covenants, and grant funded regulatory requirements
-

Founder and Chief Executive Officer

Divitiae Consulting | Texas (Multiple Jurisdictions)

June 2022 to Present

Development Services, Community Development, Economic Development, and Infrastructure Finance

- Advised municipalities and counties on full scale Development Services Department operations including planning, zoning, permitting, inspections, code enforcement, and environmental compliance
- Led entitlement strategy, zoning analysis, subdivision planning, and development review for industrial, logistics, energy, and mixed use projects
- Structured development agreements, Tax Increment Reinvestment Zones, Chapter 380 and 381 agreements, and infrastructure financing strategies
- Coordinated infrastructure capacity including water, wastewater, drainage, transportation, and utility systems
- Directed permitting pathways, environmental compliance, and multi-agency approvals

Representative Project Experience:

· Webb County (TALISE), Texas (Population: ~280,000)

- Provided development services, economic development, and infrastructure funding and financing for large scale residential, commercial, industrial and trade for the new Talise unincorporated community
- Coordinated land use, permitting, and infrastructure delivery strategy

· Bastrop County, Texas (Population: ~115,000)

- Led development, community development, and economic development strategy including infrastructure funding and subdivision growth planning
- Coordinated infrastructure financing and capital planning tied to rapid population growth

· City of Hondo, Texas (Population: ~9,500)

- Provided development services advisory including zoning, permitting, and development review process improvements

· City of Port Arthur, Texas (Population: ~54,000)

- Supported economic development and industrial expansion tied to port and energy sector growth
- Advised on development readiness and infrastructure investment

Community and Economic Development Director

City of Port Lavaca, Texas (Population: ~12,500)

January 2021 to June 2022

- Established and led the City's first unified Development Services Department integrating planning, zoning, permitting, inspections, and code enforcement
- Served as Director over current and long range planning, building, plan review, permitting, inspections, zoning, environmental compliance, and development review
- Directed subdivision review, zoning amendments, conditional use permits, and site plan approvals
- Oversaw building permitting operations, inspection coordination, and compliance tracking
- Modernized development regulations and ordinances to improve clarity, defensibility, and processing timelines
- Implemented Geographic Information Systems based permitting and tracking systems

- Directed code enforcement addressing zoning violations, nuisance properties, and unsafe structures
 - Coordinated bond funded capital improvements supporting industrial, waterfront, and residential growth
 - Ensured compliance with floodplain regulations, coastal resiliency standards, and state statutes
-

Community and Economic Development Director

Island County, Washington (Population: ~87,000)

January 2020 to January 2021

- Directed all planning, permitting, housing, and code compliance functions for unincorporated areas
 - Oversaw development review including zoning, subdivision, environmental review, and permitting coordination
 - Led FEMA National Flood Insurance Program compliance and floodplain administration
 - Updated shoreline, critical areas, and land use ordinances
 - Coordinated capital planning and infrastructure strategy with Commissioners, utilities, and regional agencies
-

Capital Programs Finance Director

Washington State Department of Transportation (WSDOT) | Washington State (Population: ~8,000,000)

Olympia, Washington

December 2015 to January 2020

- Provided executive financial leadership for a \$7.4 billion statewide capital transportation program spanning six regions
 - Directed budget development, legislative appropriations, and long range financial planning for highway, ferry, and multimodal capital programs
 - Oversaw bond funded infrastructure delivery, federal funding compliance, and coordination with the State Treasurer and bond counsel
 - Led financial reporting and performance tracking for projects in the Statewide Transportation Improvement Program and the Transportation Asset Management Plan
 - Supported freight mobility, trade corridors, port access, and industrial connectivity investments critical to statewide economic competitiveness
-

Development Services Director

City of Midland, Texas (Population: ~142,000)

September 2012 to December 2015

- Directed citywide Development Services including planning, zoning, permitting, inspections, code enforcement, and environmental compliance
- Managed high volume development activity tied to oil, gas, and industrial expansion
- Oversaw subdivision approvals, development agreements, and infrastructure commitments
- Coordinated capital expansion for utilities, transportation, and public infrastructure

- Served on the Technical Advisory Committee for the Permian Basin Metropolitan Planning Organization
 - Integrated transportation planning, freight mobility, and land use strategy
-

Environmental Programs Director

Tribal Solid Waste Advisory Network | Spokane, Washington (Represented 34 Tribal Nations in AK, WA, OR, ID)

- Directed Environmental Protection Agency funded environmental and redevelopment programs
 - Managed brownfield grants, assessment, cleanup, and redevelopment initiatives
 - Administered environmental justice grants and programs supporting community development and public health
 - Coordinated environmental compliance and intergovernmental regulatory oversight
-

Senior Planner

Spokane County, Washington (Population: ~560,000)

- Led complex land use, zoning, and development review for urban growth areas and unincorporated lands
 - Reviewed commercial, industrial, and infrastructure projects requiring multi agency approvals
 - Prepared staff reports, zoning amendments, and comprehensive plan updates
 - Coordinated environmental review and infrastructure capacity analysis
-

Associate Planner

Kootenai County, Idaho (Population: ~190,000)

- Conducted zoning analysis, subdivision review, and entitlement processing
 - Prepared staff recommendations for Planning Commission and elected officials
 - Coordinated environmental review and regulatory compliance
 - Supported comprehensive plan implementation and development regulation updates
-

EDUCATION

- Master of Business Administration, University of Texas, Expected 2027
 - Bachelor of Arts, Environmental Studies, Washington State University
-

CERTIFICATIONS

- AEP Texas Energizing Economic Development
- Certified Wetland Mitigation Specialist, Washington State Department of Natural Resources
- Sigma Six Leadership Program

PEGGY CASTAÑO

CAREER PROFILE

Results-driven and seasoned Assistant City Manager with over a 15 years of vibrant leadership experience in municipal government. Proven track record of successfully collaborating with Mayors, Commissioners, residents, business owners, and staff to achieve organizational goals. Adept at directing day-to-day operations, strategic planning, and navigating diverse municipal administration levels. Skilled in managing multiple city departments, including Administration, Public Information Office, Engineering, Parks & Recreation, Development Services, Code Enforcement, Public Works, and Community Improvement Projects. Experienced in managing multi-million dollar budgets and maintaining strong fiscal oversight; commended for building solid relationships with community members, local schools, and stakeholders through active engagement in community events and promoting open communication.

KEY RESPONSIBILITIES AND ACHIEVEMENTS

- ❖ Oversee daily operations and provide strategic direction to ensure continuous progress and effectiveness across municipal administration. Act as City Manager or Interim Director for multiple departments and complete special projects and administrative tasks as needed.
- ❖ My comprehensive portfolio consists of several key departments, including Communications and Public Information Office (PIO), Engineering and Construction Services, Public Works, Intergovernmental Affairs, Development Services, and the Mayor and Commission Office. By overseeing these areas, I foster collaboration across the city, drive vital initiatives, and implement robust support systems to optimize operations, encourage development, and ensure clear communication.
- ❖ Demonstrate adaptability and strong leadership skills as Interim Director of Development Services, managing five divisions: Building and Permitting, Housing, Planning and Zoning, Business Tax Receipt, and Code Enforcement.
- ❖ Successfully implemented Energov and managed Engineering and Construction Services, overseeing \$35 million in completed projects and \$80 million in strategic planning stages, showcasing proficiency in project management and fiscal responsibility.
- ❖ Secure significant funding for critical projects by developing and presenting persuasive legislative and federal agendas, addressing community needs, and promoting fiscal accountability.
- ❖ Cultivate relationships with diverse stakeholders, maintaining transparency and trust with the public, and enhancing the city's image through comprehensive branding, marketing, and crisis communications strategies.
- ❖ Support financial sustainability by identifying, securing, and managing grants and external funding sources to enable the successful execution of city projects and programs.

- ❖ Actively contribute to developing and implementing the city's strategic vision, mission, and goals, ensuring alignment with community needs and fostering overall growth.
- ❖ Build and lead high-performing teams, create a positive and collaborative work environment, and invest in the professional development of city staff to promote a culture of continuous improvement and innovation.

CAREER PROGRESSION

OPERATIONS MANAGER

Collier County EMS

December 2025 – Present

Provide executive-level operational leadership for a countywide EMS system serving more than 417,000 residents. Oversee daily EMS operations, strategic initiatives, and performance improvement efforts for more than 229 employees across 27 stations.

- ❖ Directly develop, administer, and oversee a \$90 million annual EMS operating budget.
- ❖ Provide executive oversight for countywide EMS operations serving 417,000+ residents.
- ❖ Lead strategic EMS and Fire Rescue consolidation initiatives.
- ❖ Direct workforce management, operational readiness, compliance, and performance improvement.

SENIOR CONSULTANT

Local Government Consultant Group

June 2025- Current

As a Senior Consultant specializing in local government services, I provide interim departmental oversight, project management, and expert guidance in internal and external communications, marketing, branding, capital improvement project supervision, and governmental affairs at the federal and state legislative levels. In addition, I offer tailored solutions for Assistant City Manager roles and administration challenges. Drawing from my experience as an Assistant City Manager, I understand the pivotal role this position plays in ensuring the smooth and efficient functioning of municipalities. My expertise spans various facets of day-to-day operations, contributing significantly to the overall success and well-being of communities. By collaborating with department heads and staff, I focus on streamlining processes and improving operational landscapes. In line with my strategic leadership capabilities, I support city leadership in identifying critical priorities and implementing strategies that align with long-term goals, fostering sustainable growth and development. My current projects and accomplishments include:

- ❖ Mayor and Commission Office: Facilitating effective policy implementation and fostering transparent communication between city leadership and the community.
- ❖ Engineering Services: Directing infrastructure projects, urban planning initiatives, and development activities, ensuring alignment with sustainable growth objectives.
- ❖ Communication: Overseeing branding and communication strategies, creating, and delivering engaging content through multiple channels to maintain a positive public image.
- ❖ Strategic Planning: Identifying opportunities for continuous improvement by evaluating departmental processes, implementing best practices, and pursuing innovative solutions to enhance operational effectiveness.

- ❖ **State and Federal Legislative Agendas:** Working closely with government officials and stakeholders to advocate for the city's interests, secure funding, and shape beneficial policies.
- ❖ **Development Services:** Demonstrating versatile leadership while overseeing critical divisions, ensuring seamless operations, enhancing collaboration, and facilitating successful implementation of key initiatives.
- ❖ Collaborate with department heads and staff to streamline processes, improve operational landscapes, and implement strategic initiatives, including Standard Operating Procedures (SOP) assessment and updates.

With my wealth of experience and deep understanding of local government administration, I am dedicated to providing effective solutions that contribute to the successful operation of cities and the well-being of their communities.

ASSISTANT CITY MANAGER/ADMINISTRATIVE SERVICES DIRECTOR

City of Lauderdale Lakes, FL

July 2023 – June 2025

As the Assistant City Manager, I play a pivotal role in ensuring the smooth and efficient functioning of all aspects of our municipality. My responsibilities encompass comprehensive support across various facets of day-to-day operations, contributing significantly to our community's overall success and well-being. This involves collaborating with department heads and staff to streamline processes and enhance the overall operational landscape. Part of my role consists of contributing to the development and execution of the city's strategic vision. I work closely with city leadership to identify critical priorities and implement strategies that align with our long-term goals, ensuring sustainable growth and development.

In addition to my overarching role in supporting the City Manager in all areas of the city's day-to-day operations, I also manage a dedicated department that serves as a hub for crucial functions within our municipality. This department encompasses the Mayor and Commission office, Engineering Services, Capital Improvement Projects, Public Works, Parks and Recreation and Communications, reflecting a comprehensive portfolio of responsibilities.

- ❖ **Leadership and Coordination:** As a strategic leader, I guide the Mayor and Commission office, facilitating effective policy implementation and fostering transparent communication between city leadership and the community.
- ❖ **Engineering Services Oversight:** Managing Engineering Services involves directing infrastructure projects, urban planning initiatives, and development activities, ensuring alignment with the city's sustainable growth and development objectives.
- ❖ **Communication:** I oversee the city's branding and communication strategies, guiding, creating, and delivering engaging content through multiple communication channels to maintain a positive public image.
- ❖ **Strategic Planning for Continuous Improvement:** Engaging in strategic planning, I identify opportunities for continuous improvement by evaluating departmental processes, implementing best practices, and pursuing innovative solutions to enhance overall operational effectiveness.

- ❖ **Public Works Management:** Overseeing the Public Works department to maintain and enhance the city's infrastructure, including roads, water systems, and public facilities, ensuring high-quality services and efficient resource allocation.
- ❖ **Parks and Recreation:** Managing the Parks and Recreation Department, I ensure the provision of diverse recreational opportunities, well-maintained parks, and engaging community programs, contributing to the city's overall quality of life and fostering a strong sense of community engagement.
- ❖ **State and Federal Legislative Agendas:** I manage the city's state and federal legislative agendas. I work closely with government officials and stakeholders to advocate for the city's interests, secure funding, and shape policies that benefit our community and support our strategic objectives.
- ❖ **Development Services:** I exhibit versatility and exceptional leadership capabilities while overseeing five critical divisions: Building and Permitting, Housing, Planning and Zoning, Business Tax Receipt, and Code Enforcement. By effectively managing these areas, I ensure seamless operations, enhance collaboration, and facilitate the successful implementation of key initiatives across the department.

ADMINISTRATIVE SERVICES DIRECTOR/ASSISTANT TO THE CITY MANAGER (ACTING ASSISTANT CITY MANAGER)

City of Lauderdale Lakes, FL

OCT 2015 – JULY 2023

As an overall generalist in the city, my mission is to assist the City Manager in effectively implementing council policies, completing projects and fostering a culture of pride and dedication among employees. With my unwavering commitment and extensive experience, I have excelled in supporting the City Manager and have focused my efforts on various areas, including overseeing and managing Capital Improvement Projects, leading the Public Information Office, supervising Legislative Aides, enhancing community outreach, improving the city's public image, and strengthening the city's interaction with stakeholders. In my years of municipal government I've obtained experience in multiple departments within the organization.

- ❖ Successfully manage the Mayor and Commission Office, ensuring smooth operations and facilitating effective communication between key stakeholders.
- ❖ Provide oversight to the Public Works Department, Engineering and Construction Services, ensuring efficient and quality project delivery.
- ❖ Oversee the City Clerk's Office, maintaining accurate records and facilitating transparent governance processes.
- ❖ Manage the Public Information Office (PIO) and all aspects of public relations for the city, ensuring effective communication with residents and the media.
- ❖ Assist the City Manager with special projects, contributing to the successful execution of strategic initiatives ensuring their timely and successful completion.
- ❖ Demonstrate proficiency in managing grant reimbursements

- ❖ Coordinate and manage the State of the City Address.
- ❖ Implement comprehensive overhauls of internal operating policies, resulting in improved operational and administrative efficiencies throughout the organization.

EXECUTIVE ADMINISTRATOR TO THE CITY MANAGER
City of Opa-locka FL.

JULY 2013 – OCT 2015

Collaborated with the City Manager to oversee the day-to-day operations of all city departments, ensuring smooth functioning and efficient service delivery. Acted as a reliable gatekeeper, providing effective and productive support to government officials at all levels (City Manager, City Commission, Directors, and residents).

- ❖ Managed and directed the utilization of Community Development Block Grant (CDBG) funding, including project management and grant proposal writing.
- ❖ Co-drafted the Community Challenge Grant, securing a \$1 million planning grant from HUD, which facilitated the update of the City's Comprehensive Plan.
- ❖ Received national recognition from the HUD Secretary for achieving the Community Challenge Grant, working in partnership with a local non-profit organization.
- ❖ Handled confidential matters within the Human Resources Department, ensuring sensitivity and professionalism in dealing with sensitive employee-related issues.
- ❖ Participated on the hiring panel for the City of Opa-locka, contributing to the selection of qualified candidates for various positions within the organization.
- ❖ Assisted the Community Development Department in implementing the Certificate of Use Program, establishing streamlined processes and effective controls that yielded fiscal benefits for the City.

SENIOR SUPERVISOR FISCAL ANALYST (2007-2013)
State of Florida Probation and Parole

JULY 2008 – JUNE 2013

During my tenure, I played a vital role in assisting the State Circuit by recovering and distributing funds that were incorrectly assigned through restitution payments and judgments. I diligently monitored all actions with a fiscal impact on the Circuit, achieving a remarkable success rate of 95.9% throughout my years in the department.

- ❖ Manage and monitor cell phones usage for probation officers
- ❖ Manage and approve travel vouchers for probation officers
- ❖ Part of the Special Recovery Team
- ❖ Implement all Court Orders as assigned by the Judge
- ❖ Provided training within the Circuit
- ❖ Receive and Document all restitution and supervision payments, prepared bank deposits, controlled inventory, and maintained equipment and technology
- ❖ Submit monthly report to my supervisors OP27, OP28, E1.

- ❖ Fingerprint and interview incoming high and medium risk offenders
- ❖ Assisted Officers and supervisors in the Circuit with the COPS report with a proven track record of a 94% decrease on all reports.

EDUCATION / CERTIFICATION

- ❖ **Master's in Public Administration**, Barry University, Miami, Florida (Dec 2020)
- ❖ **Bachelor of Arts in Public Administration**, Florida International University (FIU), Miami, Florida (December, 2011)
- ❖ **Associates of Arts in Public Administration**, Miami Dade College, Miami, Florida (May 2009)
- ❖ **Green Belt**, Six Sigma Project Training

Professional Memberships

- ❖ INTERNATIONAL CITY/COUNTY MANAGEMENT ASSOCIATION (**ICMA**)
- ❖ FLORIDA CITY AND COUNTY MANAGEMENT ASSOCIATION (**FCCMA**)
- ❖ BROWARD COUNTY AND CITY MANAGERS ASSOCIATION (**BCCMA**)
- ❖ NATIONAL INFORMATION OFFICERS ASSOCIATION (**NIOA**)
- ❖ FLORIDA MUNICIPAL COMMUNICATORS ASSOCIATION (**FMCA**)
- ❖ GOVERNMENT SOCIAL MEDIA (**GSMCON**)
- ❖ LOCAL GOVERNMENT HISPANIC NETWORK (**LGHN**)

Fee Structure

Interim Services

Interim Services Pricing

- Interim Chief Operations Officer Professional Services Fee - \$25,000 per month
- Mileage/Travel/Temporary Lodging, if necessary
- Comprehensive Media Search - \$500
- Background Report - \$400
- If your organization hires the candidate placed as Interim for a permanent position during the term of this agreement or within 12 months after the conclusion of this agreement, Town will pay SGR an employment placement fee of \$10,000.00. This fee is waived if SGR conducts a full-service executive search for this position.

Depending on the location of the permanent residence of the selected interim candidate, the Town may need to provide a mileage/travel stipend and/or temporary lodging, such as a hotel direct billed to the Town during the term of the assignment.

Billing

SGR will submit a monthly invoice. The invoice is due within 14 days of receipt. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Executive Recruitment

Full Service Recruitment Pricing

Not-to-Exceed Price per Recruitment: \$29,419

Not-to-Exceed Price is comprised of:

- **Fixed Fee of \$26,919 ***
- **Up to \$2,500 in Ad Placements (billed at actual cost)**

** A \$1,000 discount applies if your organization utilizes an SGR Interim Professional prior to the completion of the recruitment.*

The Fixed Fee includes:

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

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

- Ad placements up to \$2,500 will be billed at the actual cost with no markup for overhead and are incorporated into our not-to-exceed price.

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

- Ad placements over and above \$2,500 will be billed back at actual cost with no markup for overhead.

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

- There may be additional charges for substantial and substantive changes made to the recruitment brochure after the brochure has been approved by the Organization and the position has been posted online. Organization would be notified of any supplemental costs prior to changes being made.
- At your request, SGR can conduct an online stakeholder survey for \$1,531 to help identify key issues or priorities that you may want to consider prior to launching the search. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to the Organization. Please note that this type of survey may extend the recruitment timeline.
- Additional questionnaires over and above the 15 included in the Fixed Fee - \$230 per candidate.
- Additional recorded interviews over and above the 15 included in the Fixed Fee - \$256 per candidate.
- Additional media search reports over and above the 15 included in the Fixed Fee - \$766 per candidate.
- Additional background investigation reports over and above the maximum of five (5) included in the Fixed Fee - \$511 per candidate.
- Additional reference checks over and above the maximum of five (5) included in the Fixed Fee - \$256 per candidate.
- DiSC Management assessments - \$179 per candidate.
- Semifinalist and finalist briefing materials will be provided to the Organization via an electronic link. Should the Organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits by the recruiter over and above the quantity included in the fixed price are an additional cost. Travel time and onsite time are billed at a professional fee of \$1,021 per day. Meals are billed back at a per diem rate of \$18 for breakfast, \$20 for lunch, and \$32 for dinner. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- SGR Executive Recruitment clients wishing to utilize the complimentary leadership development workshop would be responsible for the travel costs associated with facilitation only. Meals are billed back at a per diem rate of \$18 for breakfast, \$20 for lunch, and \$32 for dinner. Mileage will be reimbursed at the then-current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- If the organization desires any supplemental services not mentioned in this fee proposal, an estimate of the cost will be provided at that time, and no work shall be done without approval.

Billing

SGR will bill the fixed fee in three (3) installments: 35% upon approval/authorization to proceed, 35% after the applicant pool is presented, and 30% after finalist interviews. Ad placement expenses and supplemental services/other expenses will be billed as incurred or provided. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Executive Project Management & Client Support Services

Professional Services Fees

As the revised Surfside proposal is presently structured to include only one Interim COO position and one full-service Town Manager Executive Recruitment, SGR does not envision the need for any supplemental Project Management & Client Support Service fees. If, however, the Surfside project evolves in the future to include multiple interim placements, additional executive recruitments, and/or other services, SGR would reserve the option to propose a negotiated Executive Project Management & Client Support Services fee with the Town to ensure that a more expansive/dynamic suite of provided services accompanies enhanced oversight by SGR.

Comprehensive Pricing Summary

For ease of review, the pricing for all proposed services is summarized below. The preceding sections contain the complete details for each service offering.

Interim Services

Interim Services	Costs
Interim Services Professional Fee	\$25,000 per month
Mileage/Travel/Temporary Lodging	TBD
Media Search	\$500 per report
Background Investigation	\$400 per investigation

Executive Recruitment Services

Recruitment Services		Costs
Full Service Recruitment	Full Service Recruitment Fixed Fee	\$26,919 *
	Ad Placement Expenses	Estimated \$2,500. Billed at-cost.
Not-to-Exceed Price	<i>Fixed Fee + Ad Placements</i>	\$29,419

* A \$1,000 discount applies if your organization utilizes an SGR Interim Professional prior to the completion of the recruitment.

Proposed Timelines

Interim Services

The timeline below is an example only, and we will work with you to make this process as efficient as possible. This timeline begins immediately after discussion with the Town regarding your interim needs. *

Task	Business Days
Additional Interim Professional Interviews, if desired	1-2 days
Negotiation	1-2 days
Finalize Contract	1-2 days
Onboarding	TBD

** Timeline is dependent upon availability and Holidays. Organization agrees to timely provide information necessary to identify interim needs, source interim professionals, conduct interviews, negotiate interim engagement terms, and onboard selected interim professionals; failure to do so, may in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process. Media search and background investigations can take 7-14 business days, and can occur concurrently with other tasks listed above.*

Executive Recruitment

SGR anticipates undertaking initial recruitment outreach for the Surfside Town Manager position upon project authorization to generate targeted potential interest in the opportunity, but recommends that the official launch of the Town Manager recruitment not commence until approximately 60-90 days following the placement of the Interim Chief Operations Officer as described in this proposal. This approach enables SGR to gain a better understanding of the status of current Town operations and to identify other emerging challenges and opportunities that the successor Town Manager will likely face following their selection and appointment by the Town Commission.

Full Service Recruitment Timeline

Given our earlier recommendations, the timeline below is an example only, and we will work with you to finalize and approve a timeline, with adjustments made if needed after the positions are posted. *

Initial Steps Prior to Posting Position:	
- Contract Execution - Kickoff Meeting to Discuss Recruitment Strategy and Timeline - Organization/Position Insight and Analysis - Stakeholder Interviews and Listening Sessions - Deliverable: Draft Recruitment Brochure - Deliverable: Recommended Ad Placements - Organization Approves Ad Placements - Search Committee Reviews and Approves Brochure	<i>Timing varies. Estimated to take 2 weeks.</i>

Task	Week
- Post Position and Firm up Timeline - Recruitment Campaign and Outreach to Prospective Applicants - Initial Screening and Review by Executive Recruiter	Weeks 1-4
Search Committee Briefing to Review Applicant Pool and Select Semifinalists	Week 5
- Questionnaires - Recorded Semifinalist Interviews - Media Searches	Week 6
- Deliverable: Semifinalist Briefing Books via Electronic Link - Deliverable: Recorded Interviews	Week 7
Search Committee Briefing to Select Finalists	Week 8
- Background Investigation Reports - Disc Management Assessments (if desired, supplemental cost) - First-Year Plan or Other Advanced Exercise (if desired)	Weeks 9-10
Deliverable: Finalist Briefing Books via Electronic Link	Week 11
- Face-to-Face Interviews - Stakeholder Engagement (if desired) - Deliberations - Reference Checks (may occur earlier in process) - Negotiations and Hiring Process	Week 12

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