

November 25, 2017

Mayor Pam Hemminger and Chapel Hill Town Council Members
405 Martin Luther King Boulevard
Chapel Hill, NC 27517

Dear Mayor Hemminger and Chapel Hill Town Council Members:

Thank you for requesting our proposal to partner with the Town of Chapel Hill to recruit, assess and select your next Town Manager. I know how sad you are to see Roger Stancil depart. He is very talented and committed. It will be a formidable task to replace him.

Less than two years ago, I was dismayed when a city announced the hiring of a new Manager. That municipality used a well-known national search firm to recruit candidates. I was aware of some strong candidates in their pool. Yet, the candidate they selected lacked significant skills in managing staff, community engagement, and writing. Eighteen months later, he was terminated by the same Council that had hired him.

Why could the Council not see the limitations of this candidate? The Council thought they could evaluate the competencies of the top candidates by relying on a traditional interview approach. The interview is a very limited tool for evaluating candidates for such a critical position. In this case, the Council and Mayor were impressed with the depth of experience and the personable nature of this candidate – competencies that an interview can elicit. But, the interview is incapable of providing the opportunity to directly observe more critical managerial competencies, such as leadership, interpersonal, presentation, writing, supervisory, and community meeting facilitation skills. Councils often assume that a personable, knowledgeable and experienced candidate has these other competencies – all too often, that is not the case.

We knew about this candidate's limitations because he had participated in one of our processes for another municipality. We could observe these limitations because we use a more rigorous approach to assess candidates.

In the last two-three years, we have partnered with several NC municipalities to hire managers, including the following:

- Town of Wake Forest
- City of Burlington
- Town of Zebulon
- Town of Morrisville
- City of High Point
- Town of Clayton
- City of Rocky Mount
- City of Concord (ongoing)

We have also assisted Go Triangle Transit Authority and Region J COG in hiring their CEOs and with a number of municipalities and counties to hire assistant and deputy managers. We hope you will check on our work with any board members of these organizations (references for these and other processes are listed on pages 18 and 19). We think you will receive glowing references on our effectiveness and the quality of these hires including from Mayor Matheny in Zebulon and retired Mayor Ronnie Wall from Burlington, each of whom have recently served as President of the NCLM

Developmental Associates is not a traditional “headhunting” firm. Instead, we rely on more objective, systematic, and accurate methods to recruit, screen, and evaluate candidates that we call Talent Identification and Assessment. You will note as you review our proposal, that this approach reduces guesswork, and provides you with more complete and reliable information about the candidates. In short, we provide you with more detailed and in-depth information about the candidates to enable you, as a Council, to make the most informed decisions possible.

We have a proven track record of performance. During the last eight years, we have partnered with clients to fill over 100 executive positions. All but one of these hires occurred in North Carolina and range from municipalities the size of Charlotte, Durham, Greensboro, and Winston Salem to smaller ones, such as Brevard, Rutherfordton, Waynesville, Weaverville, and Zebulon.

Our approach has three goals with respect to recruitment, screening, and selection. After explaining those goals in this cover letter, we are attaching a Menu of Offerings that details each of our services on pages 7-10.

First, we provide high quality candidates from a national and statewide recruitment base. We provide four methods of recruitment.

1. We target individuals with whom we have worked directly. Having worked with thousands of managers through our consulting and training, we are well connected to leading local government managers in the region. Moreover, during the last few years we have conducted numerous searches for local government executives and have

established national and regional contacts through those processes. We have placed candidates with our North Carolina clients from a variety of locations, such as Georgia, California, Arizona, New York, Illinois, Florida, and Massachusetts. Furthermore, there are no search firms that know candidates in the North Carolina region better than Developmental Associates. North Carolina has been our home base for thirty years.

2. We make individual contacts through social media. We maintain lists of hundreds of local government managers that we can contact with email blasts, Facebook, and LinkedIn notices.
3. We know how to make the best use of the most widely referenced professional journals and websites. We can enhance the information provided to those sites by relying on a comprehensive study of the position and the organization that enables us to craft attractive, realistic, and comprehensive postings.
4. We have established a national network through our contract with NEOGOV, the number one HR application to governments nationwide. This service enables us to provide recruitment and applicant tracking solutions on a national level. We supplement that through our long-term affiliations with the International City Managers Association, the Alliance for Innovation, and the North Carolina City and County Managers Association.

Second, many clients tell us that they based previous selection decisions on less information that we provide through our screening process. We can provide such comprehensive information by using a multi-method screening approach that includes four components, as follows:

1. We develop a customized application that candidates must complete on-line. This application would be tailored to the specific challenges facing the Town of Chapel Hill. In comparison to the traditional cover letter and resume, we are then able to match candidates with the specific needs of the Town. Moreover, we are then able to make “apples-to-apples” comparisons of candidates rather than trying to piece together disparate information from resumes that are each designed differently. As an additional bonus, we can then determine whether candidates are sufficiently motivated to fill out this unique application and whether they are tech-savvy.
2. We conduct intensive interviews with each of the top candidates (up to 15). We conduct these interviews using structured questions based on the needs of Chapel Hill along with a detailed scoring system. Joe Durham, the recently retired Deputy Manager of Wake County, would conduct these screening interviews. Joe has an in-depth understanding of local government in North Carolina. The responses of each candidate are recorded and available to the Council for review.
3. Independent of the interview, we have one of our psychologists administer a psychological inventory called the Emotional Intelligence Inventory (EQi 2.0) – see page 10. This inventory, which is validated for employment, provides us with information on critical skills of the candidate, such as problem solving, assertiveness, interpersonal

relations, and teamwork. This inventory is administered independent of the interview; in other words, the psychologist administers the EQ without knowing the interview results.

4. We have a third staff member administer an in-depth survey assessing candidate written challenges they would face as Chapel Hill Town Manager. This survey is also independently scored. You then have the opportunity to view all of the above information on a spreadsheet prior to deciding which candidates to invite to the Town for even more in-depth assessment.

Third, we provide you the most in-depth and accurate information possible about the top candidates for this position to enable you to make the most informed decisions possible. It is essential to rely on three common and very comfortable methods as a part of the selection process: 1) reviews of resumes, 2) reference and background checks, and 3) interviews. Nevertheless, these are the three least accurate methods for determining the true competencies of candidates and they are the key methods used by our competition! One of many reasons for the limitations of these methods is that they rely mostly on indirect or inferential data. For example, resumes tell us what the candidate has done, but not how well he/she has performed. References rely on third-party observations that have often been shown to be unreliable and based more on familiarity than skills assessment. Interviews, when conducted in a systematic and behavioral-based fashion, can reveal certain key attributes: knowledge, verbal communication skills, and judgment (when situational questions are included). Interviews, however, are not able to directly verify other critical skills, such as budget analysis, conflict resolution, project planning, meeting or group facilitation, leadership style, problem solving, writing, or even presentation skills.

Assessment center processes and certain psychometric tests are of greater validity (almost twice as accurate) than the traditional three methods alone. Developmental Associates promotes the use of assessment centers in conjunction with other methods. In these processes, we design exercises that simulate the responsibilities of the position, such as making budget presentations, developing written project plans, facilitating staff meetings, conducting performance-based role plays, and resolving HR issues with individual departments to directly observe the skills of candidates. We independently supplement this first-hand assessment with the Emotional Intelligence Inventory (EQi 2.0) to validate what we have observed in the assessment center process. This additive combination of two highly valid methods, coupled with traditional methods, greatly enhances the accuracy and depth of information we can provide you.

Please keep in mind, that these methods do not limit the discretion of the Council; instead they enhance the quality of information the Council would have at its discretion in making screening, assessment and in final interview decisions.

Thank you for considering our services. We would be pleased to partner with Chapel Hill to find an outstanding Town Manager.

Sincerely,

A handwritten signature in black ink, reading "Stephen K. Straus". The signature is written in a cursive style with a large, stylized initial 'S'.

Stephen K. Straus, Ph.D.
President - Developmental Associates, LLC

PROPOSAL: THE TOWN OF CHAPEL HILL
RECRUITMENT, SCREENING, AND SELECTION PROCESS:
TOWN MANAGER

November 25, 2017

<u>PROPOSAL CONTENTS</u>	<u>PAGES</u>
<u>SECTION I: PROPOSED SERVICES, SCHEDULE, AND FEES</u>	
A. Scope of Work	pages 7-10
• Emotional Intelligence Factors	page 11
• Our Fees for this Project	page 12
<u>SECTION II: WHO WE ARE</u>	
A. Our Recent Clients	page 13
B. A New Approach to Executive Assessment	pages 14-15
C. Firm History and Experience	pages 15-16
D. Current Projects and Availability	page 17
E. References	pages 18-19
F. The Values of Developmental Associates	page 20
G. Assurance of Compliance with Applicable Laws	page 21
SECTION III: Resume of Lead Consultant	pages 22-26
SECTION IV: Samples of our Processes	page 27
• Sample Recruitment Brochure	

HIRE WITH CONFIDENCE PLEDGE

If Developmental Associates is responsible for recruiting and screening candidates, we guarantee that the client will find a candidate that it can hire with confidence. If the selected candidate does not continue employment for at least two years of service, Developmental Associates pledges to provide all of the services originally agreed upon with the client for no additional charge other than expenses, such as administering the Emotional Intelligence Inventory (EQi) to candidates approved by the client. Developmental Associates would continue to provide these services until the client selects a candidate it can "hire with confidence". Developmental Associates does not maintain this pledge if it is not responsible for the recruitment and screening for the position.

The information provided herein by Developmental Associates, LLC. is proprietary and confidential, offered to the recipient solely for the purpose of evaluating its service proposal. This information should not be disclosed to anyone outside the decision-making group without the company's prior authorization.

SECTION I: SCOPE OF WORK
TOWN OF CHAPEL HILL
TOWN MANAGER

RECRUITMENT AND SELECTION
Menu of Offerings

Directions: Below are the steps identified in the proposed Scope of Services, the dates when we could complete each step. **This plan includes three meetings with the Town Council. Those suggested dates are delineated in red.**

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	SUGGESTED TIMELINE
<p>Steps 1: Conduct job and organizational analyses to identify expectations and competencies for the position by meeting with the following groups:</p> <ul style="list-style-type: none"> ▪ The Town Council ▪ Department Directors ▪ Others (such as community members) as identified by the Council 	<ol style="list-style-type: none"> 1) Provides a foundation for defining the competencies sought in recruitment and in designing the selection process. 2) Builds stakeholder buy-in and perspective into the selection process. 3) Conducting a job analysis is essential for legal defensibility. 4) Conducting the organizational analyses identifies future challenges for a proactive Town Manager 	<p>January 10 with Council; week of January 15 with other stakeholders</p>
<p>Step 2: Build a candidate profile and post written job advertisements in leading professional journals, newspapers, and websites.</p>	<ol style="list-style-type: none"> 1) Written ads for both print and online publications will typically generate the largest number of applications. 2) As the employing agency, the Town would need to post the ads after they have been developed for any member-based organizations. (DA can also post ads and charge the Town for those expenses.) 3) If the Town would like a brochure, Developmental Associates can also develop that. 	<p>Post by January 23</p>
<p>Step 3: Conduct targeted recruitment of leading candidates</p>	<ol style="list-style-type: none"> 1) We have direct access to several thousand local government executives across the country. We will send out a mass email to all of these executives, but also make direct contact with a number of those that we think would be a particularly good fit with the Town of Chapel Hill. 2) By targeting candidates and making individual contacts, Developmental Associates can supplement the candidate pool with managers with excellent credentials, especially from NC and the region. 	<p>Through February 26</p>

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	SUGGESTED TIMELINE
Step 4: Conduct initial (first) level screen of candidate applications/resumes	<ol style="list-style-type: none"> 1) First level screening involves a structured process for evaluating resumes and supporting documents. We require all candidates to post their applications through NEOGOV to ensure they are responding to the specific requirements of the position and not just submitting a general resume. 2) The job analysis provides the basis for developing a structured screening guide to ensure consistent application of the selection criteria to each resume. 3) Narrow the field of candidates to a number that can be screened more intensively (through the secondary screening process described below). 4) Provides detailed and uniform information to the Council to enable it to make an informed decision about which candidates proceed in the process. 	March 1
<p>Step 5: Conduct second level screening of candidates for the position. We employ four methods in the secondary screen. To ensure objectivity, a different member of our staff would conduct each method, and we keep a “firewall” between these methods. These four methods are as follows:</p> <ul style="list-style-type: none"> ▪ Telephone interviews ▪ Emotional Intelligence (EQi) testing ▪ Electronic survey questions (short essays on accomplishments) ▪ A media (Google) search (mentions of candidates in the news media) of all candidates that pass this stage of the screening process. 	<ol style="list-style-type: none"> 1) Such advanced screening methods are useful when there is a large group of qualified candidates or the Town is unfamiliar with many of the candidates. 2) The screening method would be driven by the job analyses (Step 1). 3) Upon completion the Council would be ready to identify the finalists (up to 6) to invite to the final assessment process. 4) Provides detailed and uniform information to the Council to enable it to make an informed decision about which candidates proceed in the process. 	March 14
Step 6: Design hiring process	<ol style="list-style-type: none"> 1) The hiring process should be valid (job related) to identify the best candidates. 2) The hiring process should provide an opportunity to assess the most critical competencies required for the position including the ability of the candidate to meet the primary challenges facing the Town. 3) The hiring process should assess Emotional Intelligence (EI) as well as Cognitive Intelligence (IQ) and technical skills. 	By March 14

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	SUGGESTED TIMELINE
Step 7: Recruit assessors to evaluate the candidates (Assessors can be identified and approved by the Council)	<ol style="list-style-type: none"> 1) The types of assessors recruited depend upon the types of exercises the candidates would perform. Assessors might include local government managers and community members. 2) Assessors must complete a Statement of Confidentiality. Moreover, no single assessor will know the overall outcome of the process. That information is provided to the Council only. 3) Assessors will be trained on how to apply behavioral-based rating systems when rating candidates. 	By March 14
Step 8: Conduct selection exercises to evaluate the (up to 7) finalists Analyze EQI in-depth	<ol style="list-style-type: none"> 1) The exercises will be valid, reliable, and unbiased. 2) The candidates will be sent preparatory information and given thorough explanations in advance of the process. 3) The exercises should enable the Town to assess the strengths and weaknesses of each candidate and to determine those candidates that have the skills to fill the position. 4) The rating criteria will be premised on the job analysis and designed using objective, behavioral-based rating criteria. 	March 29-30 or April 5-6
Step 9: Facilitate final evaluation process by assisting the Council in developing final evaluation strategies and structuring the panel interviews: <ul style="list-style-type: none"> ▪ Develop interview questions and evaluation process with the Council 	<ol style="list-style-type: none"> 1) Assists the Council in developing a systematic approach for evaluating the final candidates. 2) Provides expertise to the Council in making its evaluations and hiring decision. 3) Developmental Associates can provide certain interview questions to ask candidates as well as clarify rating criteria. 	TBD
Step 10: Facilitate thorough background investigations	<ol style="list-style-type: none"> 1) Both legally and due to the sensitive and highly public nature of the position of Town Manager, we recommend thorough reference checks and background investigation. 2) Someone outside the Town should conduct the background investigation to ensure confidentiality. 3) We would coordinate the investigations and report detailed findings to the Town Council. 	TBD

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	SUGGESTED TIMELINE
<p>Step 11: Provide executive coaching to the successful candidate</p> <ul style="list-style-type: none"> ▪ Review the challenges facing the community and organization ▪ Analyze the results of the selection process ▪ Analyze the findings of the EQi ▪ Develop a plan of action ▪ Developmental feedback provided to internal candidates who are not selected. This includes a review of EQi and assessment center results 	<ol style="list-style-type: none"> 1) The assessment process provides rich information suitable for executive coaching. 2) The new Manager will be facing exciting but formidable new challenges. He/she can benefit from professional guidance in developing a plan of action to meet those challenges successful. 3) Feedback to internal candidates not selected often helps in their personal development and acceptance of the decision. This also paves the way for greater support of the selected candidate by incumbents. 	TBD

A.1: EMOTIONAL INTELLIGENCE FACTORS*

SELF-PERCEPTION REALM

EQ-i Scale	The EI Competency Assessed by the Scale
1. Emotional Self-Awareness	Ability to be aware of and understand one's feelings and their impact
2. Self-Regard	Ability to respect and accept one's strengths and weaknesses
3. Self-Actualization	Ability to improve oneself and pursue meaningful objectives

SELF-EXPRESSION REALM

EQ-i Scale	The EI Competency Assessed by the Scale
4. Emotional Expression	Ability to express one's feeling verbally and non-verbally
5. Independence	Ability to be self-directed and free of emotional dependency on others
6. Assertiveness	Ability to express feelings, beliefs, and thoughts in a nondestructive way

INTERPERSONAL REALM

EQ-i Scale	The EI Competency Assessed by the Scale
7. Interpersonal Relationships	Ability to develop and maintain mutually satisfying relationships
8. Empathy	Ability to recognize, understand and appreciate the feelings of others
9. Social Responsibility	Ability to contribute to society, one's social group, and to the welfare of others

DECISION MAKING REALM

EQ-i Scale	The EI Competency Assessed by the Scale
10. Impulse Control	Ability to resist or delay and impulse, drive, or temptation to act
11. Reality Testing	Ability to remain objective by seeing things as they really are
12. Problem Solving	Ability to solve problems where emotions are involved

STRESS-MANAGEMENT REALM

EQ-i Scale	The EI Competency Assessed by the Scale
13. Flexibility	Ability to adapt one's feeling, thinking, and behavior to change
14. Stress Tolerance	Ability to effectively cope with stressful or difficult situations
15. Optimism	Ability to remain hopeful and resilient, despite setbacks

EQ-i 2.0, Multi-Health Systems (2011), All Rights Reserved
 Adapted from The EQ Edge
 Steven J. Stein, Ph.D. and Howard E. Book, M.D.
 Third Edition (2011)

PROPOSED FEES FOR THIS PROJECT

BASIC FEE	ADDITIONAL OPTIONS (Including Maximums)
\$20,500	<ul style="list-style-type: none">• EQi – Screen @ \$70 per candidate (up to 15)• EQi- Analysis @ \$100 per candidate (up to 6)• Coaching and Feedback @ \$250 per candidate• Facilitating final interview* @ \$1500 per day• Background @\$2250 per candidate**

*Interview coordination is rarely requested by our clients because the assessment center and EQi analysis is so thorough.

**This fee would be paid directly to Chief Tom Younce.

The maximum total fee would be \$22,150 (excluding coaching). We charge no other fees or expenses.

SECTION II: WHO WE ARE

1. Our Recent Clients

North Carolina counties and municipalities are quickly recognizing the benefits of the new approach offered by Developmental Associates. During the last eighteen months we have either completed or are in the process of working with the following local governments and universities:

- The Town of Garner
- The City of Charlotte
- The City of Raleigh
- Durham County
- The City of Durham
- The City of Greensboro
- The City of Wilson
- Duke University
- NC State University
- East Carolina University
- RDU Airport Authority
- The City of High Point
- Go Triangle Transit Authority
- Triangle J Council of Governments
- The Town of Morrisville
- The Town of Wake Forest
- The Town of Zebulon
- Wake County
- Onslow County
- Cumberland County
- Region B Council of Governments
- Triangle J Council of Governments
- The City of Hendersonville
- The Town of Waynesville
- The Town of Chapel Hill
- The Town of Apex
- The University of North Carolina at Chapel Hill
- The Town of Garner
- The City of Fayetteville
- The City of Asheville
- The Town of Rutherfordton
- The Town of Mills River
- The City of Wilson
- Transylvania County
- The City of Asheboro
- Elizabeth City State University
- The Town of Zebulon
- Wake Forest University
- Fayetteville State University
- Charlotte-Douglas Airport Authority
- Mecklenburg County
- City of Concord

A New Approach to Executive Assessment – Talent Identification and Assessment

These and many other clients are recognizing that Developmental Associates has developed a new, more thorough, accurate, and comprehensive model for executive processes – which we call Talent Identification and Assessment. The old “Search Model” makes four outdated assumptions. First, it assumes that the search firm is in close contact with top candidates that will only apply for the position if contacted by the firm. This model fails to take into account the use of modern technology to recruit. There are now many more ways to reach out candidates than has been traditionally the case. Developmental Associates uses multiple recruitment methods including targeting individuals, placing ads in leading professional websites and journals, relying extensively on social media, and connecting with our national network through NEOGOV – the leading public sector technology solution for recruitment and selection in the United States.

Second, it also assumes that search firms can actually evaluate the quality of candidates because they know how each candidate is performing in their current position. That is a myth. Knowing a manager, even befriending a manager, does not mean that the search firm can actually assess that candidate’s performance in day-to-day activities. The search firm does not directly observe how the candidate develops budgets, deals with staff, plans, organizes, or deals with conflicts. Developmental Associates uses an extensive, multi-method screening approach that provides you with a more sound understanding of the skills and competencies of each candidate. Because this process is standardized it enables fair comparisons across candidates.

Third, it presumes that candidates can be evaluated comprehensively through interviews. This is simply not the case. We all like to lay our eyes on the top candidates and see how they present themselves and think. Nevertheless, interviews, at best, can only directly determine how well the candidate can communicate, his/her knowledge, and judgment. The interview is too limited to assess other essential management and leadership skills, such as writing, developing budgets, problem solving, dealing with staff, managing projects, and so on. All that can be learned from the interview about these essential skills is what the candidates say they do. We provide intensive assessment of candidate skills that other firms do not offer before the board begins its interview process. This assessment center process enables you to directly observe the skills of candidates performing a variety of executive skills, such as managing staff, budgeting, dealing with the media, making presentations, facilitating staff meetings, and so on.

Fourth, many firms will also tout their national networks which will bring candidates from all corners of the country. We find that, all things being equal, most of our clients are more interested in a candidate with regional or North Carolina experience. North Carolina has a more professional approach to local government than do most states and is committed to the Council-Manager form of government. No firm has better statewide connections than does Developmental Associates. We have been focused specifically on NC local government for twenty-five years. Despite focusing our services primarily in NC, we have recruited candidates from all over the United States – from California to New York and Florida.

2. Firm History and Experience

Developmental Associates has extensive background in human resources, and management consulting for more than twenty-five years with over fifty local governments in North Carolina and with the leading North Carolina universities including Duke, Wake Forest, UNC-Chapel Hill, and NC State. Developmental Associates provides cutting edge services that go beyond typical human resource consulting firms at a reasonable cost. We are a five member organization that combines strong academic and practitioner experiences into the services we provide to public and not-for-profit organizations.

Below are some of the distinctive advantages we offer:

- We are a North Carolina-based firm specializing in public sector, nonprofit and educational organizations. We operate in North Carolina predominantly, and have done so for over 25 years. Steve Straus has been a long-time member and frequent presenter with the NC City and County Managers Association. For 26 years he has taught in the Masters of Public Administrative Programs at NC State University and UNC Chapel Hill and has served on the faculty at the School of Government at UNC-Chapel Hill. He has published in the leading public sector journals.

Heather Lee has served as a faculty member and administrator at the NC Center for Women in Public Service as well as for the William Peace University Human Resources degree program. She is a former Vice-President for Human Resources with the NC Easter Seals Society. Heather has consulted extensively with local governments and is the co-designer of and a faculty member in the North Carolina Public Managers Program.

Joe Durham recently retired as Wake County Deputy Manager after more than thirty years of service as a NC local government manager. Joe is one of the more respected managers in NC local government and is well versed on the challenges facing the profession. He has "lived in the trenches". Moreover, he does an outstanding job of conducting interviews and debriefing with boards as well as recruiting outstanding candidates.

Mike Ruffin has over 30 years of service in NC local government concluding with service as Durham County Manager. Mike is an outstanding recruiter and interviewer who is adept at finding and educating great candidates about career opportunities.

Tom Younce, who conducts our reference and background investigations, has served as Chief for the Wilson Police Department. He retired as Chief for NC State University and served as President of the NC Association of Chiefs of Police during his career. We employ a multi-disciplinary team on each project with each of us specializing in recruitment, selection, training, background investigations, and executive coaching.

- The lead consultant on this project would be Stephen K. Straus, Ph.D. He would team with Heather Lee, Ph.D. SPHR, Joe Durham, and Mike Ruffin. We have included Steve's resume at the end of this proposal.
- Our screening methods are multi-method and comprehensive. Search firms often

develop a negative reputation and take advantage of local governments by parading a group of close contacts through the selection process. Moreover, they allow applicants, particularly those who only have a passing interest in a position, to submit a non-standardized cover letter and resume. Developmental Associates insists on a more objective and thorough screening approach that demands a certain level of motivation from all candidates. We develop a set of filtering questions through our job and organizational analyses. These questions focus more on accomplishments than on the traditional resume-focus of positions held. Candidates must respond to questions tailored for the specific needs of the position and the Town. As a result, we are able to compare candidates on similar criteria and make more objective determinations of which ones should be advanced in the process.

Those candidates that pass the initial screen undertake a secondary screen. We tailor this secondary screen to the position, but typically we require responses to more in-depth survey questions, conduct recorded telephone/Skype interviews, and administer the EQi 2.0, an emotional intelligence inventory (a validated employment test described below), to all candidates in the secondary screen. This multi-method approach provides a rich basis for the Council to evaluate and determine which candidates should be invited to the selection process.

- We are experts in the field of selection. We provide a frank assessment of typical selection approaches particularly including the traditional search firm approach of relying extensively on the weakest of predictors of job performance: resumes, references, and interviews. We, instead, tailor a multi-method and behavioral approach to develop real world simulations. These simulations, commonly called an "assessment center", provide more in-depth and accurate information about the candidate than do the traditional methods.
- We are also experts in the field of Emotional Intelligence (EI). Research finds that EI contributes substantially to managerial success. A list of EI factors is included with this proposal on page 14. While EI factors are commonly understood to be instrumental for effective leadership, most employers find it difficult to evaluate factors accurately, such as self-regard, independence, social responsibility, stress tolerance, impulse control, and empathy. Moreover, it is the rare client that understands how to connect the relationship among these factors to produce an overall understanding of the candidate. Developmental Associates is able to make these connections. We are able to test for EI (through the EQ 2.0 Inventory – a validated employment test) and integrate it into a variety of selection methods, such as behavioral-based interviews, presentations, role plays, and even written exercises. Our selection methods far surpass common methods in producing an in-depth understanding of the technical skills, interpersonal skills, job knowledge, and Emotional Intelligence of each candidate. This allows the organization to make the most informed decision possible on the competencies of candidates. Dr. Heather Lee is a Certified Trainer and has conducted certification programs on EI that have drawn international participation. Dr. Straus and Chief Moss are also certified on the EQ Inventory.

3. REFERENCES

<p>City of Burlington Former Mayor Ronnie Wall (336) 395-8550 rwall@theburlingtonschool.org DA assisted Burlington in hiring two Police Chiefs, its the Planning and Economic Development Director and City Manager Hardin Watkins. Feel free to contact any other member of the Burlington City Council.</p>	<p>Town of Chapel Hill Town Manager Roger Stancil (919) 968-2743 rstancil@townofchapelhill.org DA has helped the Town hire several department head positions and also with succession planning. Roger Stancil probably knows more about our work than any other Manager.</p>
<p>The City of Charlotte Police Chief Kerr Putney (704) 336-2338 HR Director Cheryl Brown (704) 579-9197 clbrown@ci.charlotte.nc.us DA helped Charlotte hire two Assistant City Managers, and Corporate Communications Director. Moreover, we conduct the promotional processes for the Charlotte-Mecklenburg Police Department.</p>	<p>Cumberland County County Manager Amy Canon (910) 678-7723 acannon@co.cumberland.nc.us DA recently assisted Cumberland County in hiring an Assistant Manager and Tax Administrator.</p>
<p>City of Durham City Manager Tom Bonfield (919) 560-4222 Tom.Bonfield@durhamnc.gov DA assisted Tom in hiring a Deputy Manager and Assistant Directors in Parks and Recreation. We are currently working with Durham to hire a Chief of Police.</p>	<p>City of Fayetteville Manager Doug Hewitt dhewett@ci.fay.nc.us (910) 309-0284 DA assisted Fayetteville in hiring its Police Chief, Director of Engineering and Infrastructure and a Human Relations Director.</p>
<p>Town of Garner City Manager Rodney Dickerson (919) 218-3764 rdickerson@garnernc.gov Feel free to contact any of the Town Council. The Town contracted with DA to hire its Town Manager. We have also helped them hire the Police Chief, HR Director, and Economic Development Director.</p>	<p>City of Greensboro Manager Jim Westmoreland (336) 373-2002 jim.westmoreland@greensboro-nc.gov DA has assisted in Greensboro in hiring several department directors and higher level staff.</p>
<p>City of Hendersonville Manager John Connett (828) 606-1410 jconnett@cityofhendersonville.org DA helped Hendersonville hire its City Manager in 2013. Feel free to contact any of the Council members about our work. We have also worked with Manager John Connet to hire a Fire Chief</p>	<p>City of High Point Manager Greg Demko 336-883-8556 geg.demko@highpointnc.gov DA assisted High Point in hiring its City Manager in 2014. We are currently working with the City to hire a Chief of Police.</p>
<p>Town of Morrisville Mayor Manager Martha Paige (919) 463-6150 mpaige@townofmorrisville.org DA worked with a split Council to arrive at an enthusiastic and unanimous decision to hire its City Manager – Martha Paige in 2014. We have recently assisted Morrisville in hiring a Finance Director, Chief of Police, and Fire Chief</p>	<p>Onslow County Manager David Cotton david_cotton@onslowcountync.gov (910) 389-1851 DA has assisted Onslow County in hiring several department directors. DA conducts all executive selection processes for Onslow County.</p>

<p>City of Rocky Mount Mayor David Combs (252) 813-9621 c21combs@aol.com DA helped the City hire its Manager. Feel free to contact any Rocky Mount City Council member about our work</p>	<p>City of Spartanburg, SC Manager Ed Memmott (864) 596-2394 ememmott@cityofspartanburg.org DA helped Spartanburg hire its Chief of Police in 2013.</p>
<p>Town of Wake Forest Mayor Vivian Jones mayor@wakeforestnc.gov (919) 554-1243 DA partnered with Wake Forest to hire its Town Manager, Parks and Recreation, and Human Resources Directors</p>	<p>Transylvania County Former Chair Mike Hawkins (828) 553-2863 mike.hawkins@transylvaniacounty.org DA assisted the County in hiring a Manager in 2014 and Social Services Director in 2015</p>
<p>City of Winston Salem Manager Lee Garrity (336)747-7380 leeg@cityofws.org DA assisted Winston Salem in hiring its Chiefs of Police and Fire. We are currently working with Winston Salem to hire a CIO.</p>	<p>Town of Zebulon Mayor Bob Matheny (919) 302-1933 bmatheny@Cityofzebulon.org (919) 302-1933 DA assisted Zebulon in hiring its Manager as well as its Police and Fire Chiefs in previous years.</p>
<p>Go Triangle Transit Authority Fred Day – Head of Search Committee (919) 760-3752 fn.day@hotmail.com DA partnered with the Authority to hire its current CEO, Jeff Mann in 2015.</p>	<p>City of Williamsburg, Virginia Manager Marvin Collins mcollins@williamsburgva.gov (757) 220-6100 DA worked with Mr. Collins to hire a Chief of Police in 2016.</p>
<p>City of Statesboro, Georgia Manager Randy Wetmore randy.wetmore@statesboroga.gov (912) 764-0683 DA worked with Mr. Wetmore to hire a Chief of Police in 2016.</p>	<p>Transylvania County Chair Mike Hawkins (828) 553-2863 mike.hawkins@transylvaniacounty.org DA assisted the County in hiring a Manager in 2014 and Social Services Director in 2015</p>



The Values of Developmental Associates

We believe in the importance of governments and educational institutions as fundamental to an effective society.

Developmental Associates operates according to the following values:

- Providing accurate and in-depth information by which clients can make informed decisions
- Working with organizations that are service based and mission driven
- Working as a partner with the organization and its key stakeholders
- Maintaining confidentiality in all our work - especially given the local government context
- Providing services that are both transparent to all participants and legally defensible
- Customizing our work to fit the organization's culture and the issues
- Establishing a reputation as fair, credible and trustworthy
- Using emotional intelligence concepts and research to ground our work

STATEMENT OF COMPLIANCE WITH FEDERAL AND STATE OF NC LAW

Developmental Associates, LLC complies with all Federal laws and regulations of the United States as well as all State of North Carolina laws and regulations including safety regulations as specified by OSHA and the NC Department of Labor. It is the policy of Developmental Associates, LLC that no person on the basis of race, color, religion, national origin or ancestry, age, sex, marital status, handicap, or limited English proficiency shall be discriminated against, excluded from participation in, denied the benefits of, or otherwise be subject to, discrimination in any form.

Principals:

Stephen K. Straus, Ph.D.

Heather A. Lee, Ph.D.

Thomas M. Moss, MPA

Korrel Kanoy, Ph.D.

STEPHEN K. STRAUS, Ph.D.

BUSINESS ADDRESS:

8125 Kennebec Drive

Chapel Hill, NC 27517

e-mail: skstraus@developmentalassociates.com

phone: (919) 812-0132

EDUCATION:

Ph.D. in Political Science, December 1986

- Duke University, Durham, North Carolina

Masters in Public Administration, 1980

- The University of North Carolina at Chapel Hill, Chapel Hill, North Carolina
- Honors and Awards
 - Title IX Fellowship for Academic Excellence, 1980

B.S. in Economics, 1972

- The Wharton School of Business and Finance, Philadelphia, Pennsylvania

B.A. in Sociology, 1972

- The University of Pennsylvania, Philadelphia, Pennsylvania

PROFESSIONAL EXPERIENCE:

Founder and President - Developmental Associates, LLC, Chapel Hill, NC (Client List Available on Request) - [Developmental Associates](#) is an organizational development company specializing in nonprofit, public and educational sectors (1991 to present):

Projects include:

- Executive recruitment and selection
- Emotional intelligence assessment
- 360 assessment and coaching
- Results Based strategic planning
- Goal setting retreats for boards, managers and staff
- Team building
- Executive coaching
- Organizational development
- Training needs analysis
- Selection and promotional systems
- Performance appraisal systems
- Organizational evaluation
- Customer service
- Total Quality Management
- Assessment centers and interview panels
- Outcome-Based Performance Management Systems

Training with North Carolina state and local agencies, nonprofit organizations and private businesses (1991 to present)

Courses include:

- Supervision
- Conflict management
- Leadership
- Role of the personnel department
- Interviewing and selection
- Training and development
- Board and manager relationships
- Applied Systems Management

FACULTY APPOINTMENTS

Masters of Public Administration Program, North Carolina State University, 1990 to present

Courses Taught:

Public Administration (PA 511): Introductory course for graduate students in public administration, including lectures and experiential learning exercises in public management, organization theory, budgeting, personnel management, and administrative behavior.

Problem Solving for Public and Not-for-Profit Managers (PA 535): This course focuses on the unique environment that managers in public and not-for-profit organizations face. Based on this environment, managers need to develop appropriate problem solving skills that are distinctive from the private sector. The course teaches students how to apply this model both strategically and in day-to-day decision making.

Team Building for Public Managers (PA 618): Course based on experiential learning techniques including special projects with public agencies. Topics include group and organizational skills, such as action research, problem solving, decision making, conflict resolution, group development, and evaluation.

Organizational Behavior (PA 617): First half of course emphasizes management functions, such as problem solving, communications, leadership, motivation, and organizational change. Second half focuses on organizational systems and organizational trends in the public sector such as TQM, service excellence, and reinventing government.

Faculty Member (1991 to present) and Administrator (1991-1993), Administrative Officers' Management Program, Sponsored by the Masters of Public Administration Program and Office of Continuing Education, North Carolina State University.

- Taught courses in Management Skills to law enforcement managers from across the Southeast United States

Director, North Carolina Legislative Internship Program, Sponsored by North Carolina State University, Raleigh, NC and the North Carolina General Assembly (7/96 to present)

- Publicized program throughout the state
- Developed and implemented statewide intern selection process
- Liaison with leaders of the General Assembly over internship issues
- Faculty supervisor of internships
- Facilitated internship class

Training Coordinator, Masters of Public Administration Program North Carolina State University, Raleigh, NC (7/91 to present). Coordinating or conducting training: for public and nonprofit managers on the following topics:

- Developmental Supervision
- Employee Selection and Promotion
- Total Quality Management for Public Managers

Extension Assistant Professor, Masters of Public Administration Program North Carolina State University, Raleigh, NC (7/91 to present).

Faculty of International City Managers Association (ICMA) University: (1992 and 2005 to present). Taught courses in New Hampshire, Tennessee, and North Carolina.

Developer and Administrator of the Assessment and Development Program for Local Government Management Excellence, Masters of Public Administration Program North Carolina State University, Raleigh, NC (7/92 to 7/97).

- Designed for local government managers, assistant managers and department heads
 - Assessment of each manager's skills
 - Workshops tailored to the specific needs of each manager
 - Skills-based workshops (behavioral modeling)
 - Application to the work place (work-based assignments)

Assistant Professor, Institute of Government, University of North Carolina, Chapel Hill, North Carolina (7/88 to 6/92).

- Taught management courses to local government officials
- Consulted on management and personnel issues with State of North Carolina officials, and city and county managers
- Facilitated retreats with boards and managers and with managers and their staffs
- Conducted research on local government management practices

Adjunct Professor, Department of Political Science and Public Administration, North Carolina State University, Raleigh, NC (9/83 to 7/88).

- Taught Undergraduate classes in American Government and Public Administration
- Taught Masters of Public Administration Classes in Organizational Behavior and Organizational Design

Graduate Instructor, Department of Political Science, Duke University, Durham, N.C. (9/81 to 7/84)

- Teaching Assistant in American Government
- Teaching Assistant in International Relations
- Instructor in Public Administration

OTHER WORK EXPERIENCE

Account Manager, Management Improvement Corporation of America (Summer, 1981).

- Consulted with several Fortune 500 companies in developing targeted jobs programs.

Assistant City Manager, Southern Pines, North Carolina (1976-1980).

- Executive responsibility for personnel, and finance administration and a variety of related duties.

Research Coordinator, Asheville-Buncombe Community Relations Council, Asheville, North Carolina (1973-1976).

- Researched social and economic conditions in the city and county relating to discrimination in housing and employment for minorities and women.

PUBLICATIONS:

Dissertation:

Public Organizational Effectiveness and Decision-Making: An Empirical Application of the Internal Systems Approach to North Carolina Municipal Personnel Departments, Ann Arbor; University Microfilms International, 1986; 409 pages.

Articles:

James E. Swiss and Stephen K. Straus (2005). Implementing Results-Based Management in Local Government. *Popular Government*, 70(3), Spring-Summer.

Straus, Stephen (1993). Still Unresponsive After All These Years? The Intra-organizational Role of Public Personnel Departments, *Public Administration Quarterly*, 23(4), December, 385-402.

Straus, Stephen (1992). The Multiple Constituencies Activities and Standards Model (MCAS) for Evaluating Public Personnel Departments, *Review of Public Personnel Administration*, June, 55-70.

Straus, Stephen (1989). Decision Making in Personnel Departments, Popular Government, 55(2), Fall.

Straus, Stephen (1988). Selecting Employees Through Systematic Interviewing, Popular Government, 53(4), Spring.

Straus, Stephen (1987). Municipal Personnel Departments: Management Tool or Employee Advocate? Popular Government, 52(2), Fall.

Straus, Stephen (1980). Selecting Employees Through Job Sample Tests, Popular Government, 55(3), Winter.

Co-authored book chapter:

Straus, Stephen and Stewart, Debra (1994). Assuring Equal Employment Opportunity in the Organization with Debra Stewart in The Handbook of Public Personnel Administration and Labor Relations, Jack Rabin (editor).

SAMPLES FROM OUR PROCESSES

A. SAMPLE RECRUITMENT BROCHURE

- Cumberland County