



**PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES FOR  
THE TOWN OF HOLDEN BEACH, NC**

**Volume I: Proposal**

**Submitted on: February 3, 2025**

***Colin Baenziger & Associates***

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***...Serving Our Clients with a Personal Touch...***

# PROPOSAL TO PROVIDE EXECUTIVE SEARCH FIRM SERVICES

## TABLE OF CONTENTS

SECTION		<u>PAGE</u>
	<b>LETTER OF INTEREST</b>	
<b>I.</b>	<b>QUALIFICATIONS AND EXPERIENCE OF THE FIRM</b>	<b>3</b>
	The Firm	
	Technical Capabilities and Organizational Structure	
	Completion of Projects within Budget	
	Completion of Projects on Schedule	
	Diversity	
	Prior Names and Litigation	
	Insurance	
	Overall Executive Search Experience	
<b>II.</b>	<b>PROPOSED WORK PLAN</b>	<b>7</b>
	Search Methodology	
	The Town's Obligations	
	Project Schedule	
<b>III.</b>	<b>PROPOSED PROJECT TEAM</b>	<b>13</b>
	Project Team and Involvement	
	Resumes of Key Staff	
<b>IV.</b>	<b>REFERENCES</b>	<b>15</b>
<b>V.</b>	<b>FEE AND WARRANTY</b>	<b>19</b>
<b>VOLUME II</b>		
	APPENDIX A: ALL GOVERNMENTAL SEARCH ASSIGNMENTS	<b>A-1</b>
	APPENDIX B: SAMPLE RECRUITMENT BROCHURE	<b>B-1</b>
	APPENDIX C: SAMPLE CANDIDATE REPORT	<b>C-1</b>
	APPENDIX D: RESOLUTION OF ST. JOHNS COUNTY, FL	<b>D-1</b>
	APPENDIX E: COMMENTS ON CB&A'S VETTING PROCESS	<b>E-1</b>

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EXECUTIVE RECRUITING

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February 3, 2025

The Honorable Mayor J. Alan Holden, Mayor Pro Tem Tom Myers and Commissioners Page  
Dyer, Rick Paarfus, Rick Smith, and Tracey Thomas  
Attn: Heather Finnell, Town Clerk  
Town of Holden Beach  
110 Rothschild Street  
Holden Beach, NC 28462

Mayor Holden, Mayor Pro Tem Myers and Commissioners Dyer, Paarfus, Smith, and Thomas:

Colin Baenziger & Associates (CB&A) would like to thank you for the opportunity to submit this proposal to assist in finding your next Town Manager. While selecting key personnel is never easy, CB&A has developed a problem-free process that has been tested across the country and found to be extremely effective.

CB&A is a municipal recruiting firm with a national reach. We have conducted assignments from Florida to Alaska and Maine to California. We pride ourselves on providing not just high-quality results, but, equally important, providing a great deal of personal attention to each of our local government clients. To conduct a proper recruitment, we feel the project manager must do more than just drop by occasionally. He/she must get to know the appropriate government officials and the community firsthand. That effort takes time, but it is the only way to ensure the candidates we recommend are well qualified and a good fit for your community. As a result, we only take a few clients at a time and focus on getting the job done properly. Further, we routinely complete our work in sixty to ninety days. This timeframe includes preparation of recruitment and advertising materials, candidate outreach, candidate screening, finalist interviewing, and selection. We also offer one of the better warranties in the industry.

Locally, we have found City Managers for Greensboro, Fayetteville, Monroe, Mooresville, North Topsail Beach; Assistant/Deputy City Managers for Durham and Jacksonville; and the County manager for Union County, NC. Nationally we have found City Managers for Ankeny, IA; Bellevue,

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EXECUTIVE RECRUITING

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WA; Doraville, GA; Fayetteville, NC; Portland, ME; Roanoke, VA; Scottsdale, AZ; Tacoma, WA; and Winchester, VA. We have also found the Borough Manager for Matanuska-Susitna Borough, Alaska (a county the size of West Virginia) as well as County Managers for Brevard County, FL; Clackamas County, OR; Clay County, FL; El Paso County, TX; James City County, VA; Polk County, IA; St. Lucie County, FL; and St. Johns County, FL.

Some of our current searches include City Managers for Fort Walton Beach, FL, Juno Beach, FL, Longview, WA, Nome, AK, Sarasota, FL, and Wilmington, NC.

Those authorized to bind the company are partners Colin Baenziger and Scott Krim, as well as Lynelle Klein, Senior Vice President for Operations.

We look forward to formally presenting our credentials and working with you in the near future. If you have any questions, please feel free to contact me at (561) 707-3537.

Sincerely,



Colin Baenziger  
Senior Partner

***...Serving Our Clients with a Personal Touch...***

## ***I. Qualifications and Experience of the Firm***

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### ***The Firm, Its Philosophy, & Its Experience***

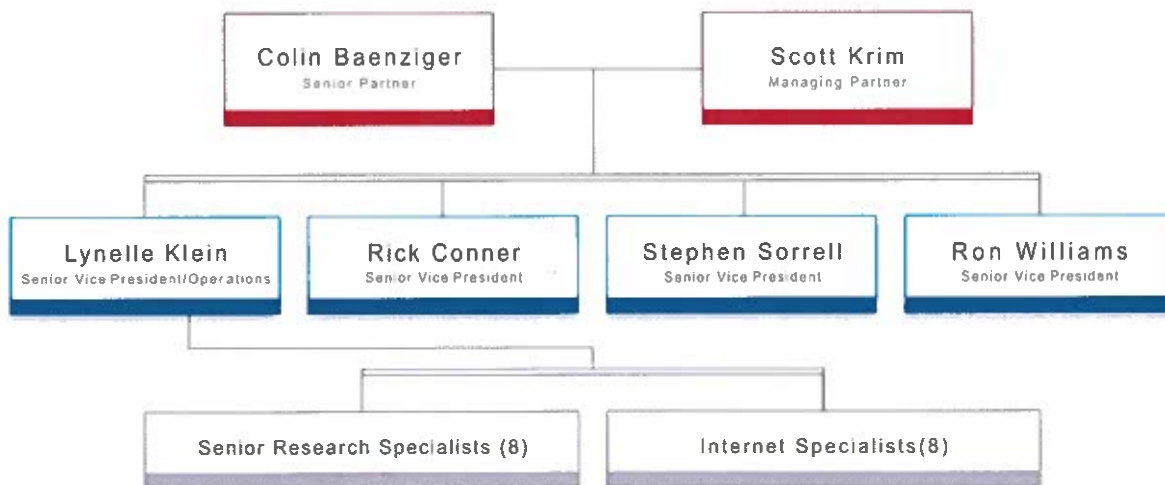
Colin Baenziger & Associates (CB&A) is a nationally recognized executive recruiting firm established in 1997 and owned and operated by Colin Baenziger. We are a sole proprietorship headquartered in Volusia County, FL with satellite offices in Grand Junction, CO, Live Oak, FL, Ogden, UT, and Pensacola, FL. As a sole proprietorship, we are not registered with any state as a corporation, foreign or otherwise.

Colin Baenziger & Associates' outstanding reputation is derived from our commitment to the quality of our product and the timeliness of the delivery. Further, our work is not done until you are fully satisfied. That means we go the extra mile and, at times, expend more effort and energy than originally anticipated in our action plan. When we do so, we do not ask for more than the originally quoted price. We feel you are hiring us as your experts and once a contract is signed, we have an obligation to fulfill its requirements with excellence, on time, and within budget. We simply do not believe in unforeseen circumstances.

Since beginning our executive search practice in 1998, we have conducted searches for clients in thirty-five states. Overall, we have sought over 230 CEOs for cities, counties, and special districts. We have also conducted over 415 searches overall. The basic approach outlined herein has been refined to the point where it is problem-free.

### ***Technical Capabilities and Organizational Structure***

Colin Baenziger & Associates has developed its business model over the past 27 years, and it has proved to be extremely effective. Our work has focused primarily on Executive Search and our staff is extremely capable and experienced. See Section III for more details. The structure of our firm is outlined below.



## ***I. Qualifications and Experience of the Firm (continued)***

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### ***Completion of Projects within Budget***

Colin Baenziger & Associates is proud of its record of completing searches within budget. Once we quote a price to the client, that price is what the client will pay, no matter how difficult the search is or what circumstances may develop. ***We have never requested anything beyond the originally quoted price, even when we were probably entitled to do so, and we never will.***

### ***Completion of Projects on Schedule***

Colin Baenziger & Associates routinely completes its assignments within ninety days. Further, since CB&A began performing recruitments, ***it has never missed a significant project milestone.***

### ***Diversity***

CB&A has extensive contacts with individuals and organizations representing women and minorities. We are thus able to identify and bring a diverse group of finalists to the City. The proof is that since 2012, 38% of the candidates selected as semi-finalists have been females and/or minorities. Some years have been as high as 52%.

### ***Prior Names and Litigation***

Colin Baenziger & Associates has always operated under its current name and has never been involved in any litigation, except to testify as an expert witness on behalf of one of the parties. Our performance has never been questioned nor have we or any of our clients been involved in any legal action as a result of our work.

### ***Insurance***

To protect our clients, Colin Baenziger & Associates maintains the following insurance coverages: (1) general liability insurance of \$2 million combined single limit per occurrence for bodily injury, personal injury, and property damages, (2) automobile liability insurance of \$1 million per accident, and (3) professional liability insurance of \$1 million per occurrence and \$2 million aggregate. Further, we carry the required workers compensation insurance for all our employees.

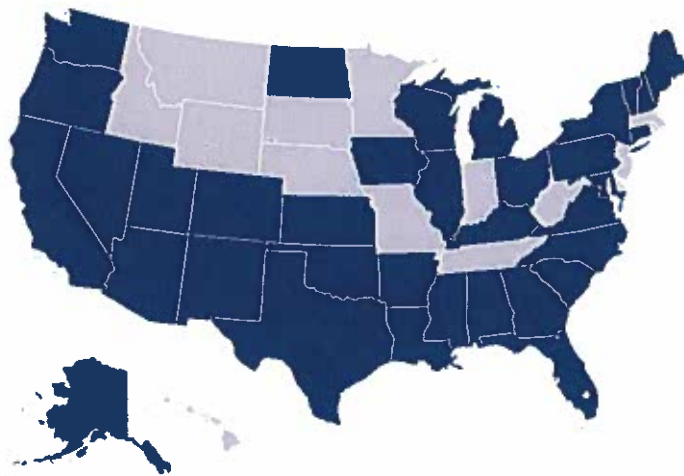
## ***I. Qualifications and Experience of the Firm*** (continued)

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### ***Geographic Reach***

Since initiating its search function in 1998, CB&A has become a nationwide recruiting firm. We have conducted searches in 35 states, see Figure I below. A complete list of our searches can be found in Appendix A.

**Figure I: We have served clients in the states highlighted in blue.**







## ***II. Proposed Work Plan***

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The following search methodology has been refined over the past twenty-seven years and is virtually foolproof. That said, we will integrate any ideas you have into the process to the extent possible. Our goal is to ensure you have the right people to interview as well as all the information you need to make the right decision.

### ***Phase I: Information Gathering / Needs Assessment / Brochure Preparation***

#### ***Task One: Needs Assessment***

An important part of the recruiter's work is selling the community to the very best candidates (including those who are not actively looking for the next job) while providing an honest portrayal of the community and the opportunity. As such, CB&A must first determine the needs of the client and the characteristics of the ideal candidate. Our approach is as follows:

- Gather information from the jurisdiction, its website and other sources;
- Interview the elected body and other key parties (such as Town staff). Our goal is to develop a strong sense of your organization, its leadership, its short- and long-term expectations, and its challenges;
- Determine the characteristics of the ideal candidate. These will include experience, longevity, education, personality, demeanor, skills, and achievements as well as other items you and the community consider important;
- Determine a reasonable compensation package; and
- Finalize the timeline with the Town so both the elected body and the candidates will know when the interviews will be held and when they need to be available.

If the Town wishes, we will gladly incorporate meetings with other stakeholders (such as the business community, non-profit organizations, the religious community, and so on) to gather their insights. We can also solicit the input of your residents through an on-line survey.

#### ***Task Two: Develop Position Description and Recruitment Materials***

Based on the information we gather, CB&A will next develop a comprehensive recruitment profile for your review. We will then incorporate any additional suggestions you may have and finalize the document. A sample profile is included as Appendix B. Other examples can be found on our firm's website under the "Executive Recruitments" / "Active Recruitments" tabs.

### ***Phase II: Recruitment***

#### ***Task Three: Recruit Candidates***

CB&A uses a number of approaches to identify the right people for your position. We say people (and not person) because our goal is to provide you with four to six outstanding semi-finalists. You then select the top three to five people to interview and ultimately choose the candidate who is the best fit with you and your community. The approaches we use are:

- **Networking:** The best approach is diligent outreach. We will network with potential candidates and consult our database of government professionals. As we identify outstanding candidates (many of whom are not in the market), we will approach them and

## ***II. Proposed Work Plan*** *(continued)*

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request that they apply. Often excellent candidates are reluctant to respond to advertisements because doing so may alienate their current employers.

- **Advertising:** While we will network to find the best, we will not ignore professional organizations and trade press which sometimes yield strong candidates. These might include the International City/County Management Association, North Carolina City and County Management Association, North Carolina League of Municipalities, South Carolina City and County Management Association, Municipal Association of South Carolina, LinkedIn, the National Association of Cities, and sites aimed at female and minority candidates.
- **CB&A Website:** We will also post the recruitment on our website, [www.cb-asso.com](http://www.cb-asso.com). With our reputation, many candidates consult it regularly.
- **Email:** We will e-mail the recruitment profile through our listserv of almost fourteen thousand managers and professionals who are interested in local government management positions. One of the advantages of e-mail is that if the recipient is not interested, he/she can easily forward the recruitment profile to someone else who may be interested.

We generally do not use local newspapers, national newspapers, or generic websites because while they produce large numbers of applications, they generally do not produce the caliber of candidates we are seeking. If the Town wants to have ads placed in these venues, it will need to bear the cost.

### ***Phase III: Screening and Finalist Selection***

#### ***Task Four: Evaluate the Candidates***

Based on our most recent recruiting efforts, we anticipate receiving resumes from forty to sixty applicants. We will use the information we developed in Phase I to narrow the field. Selecting strong candidates is, in reality, more of an art than a science and a mixture of in-depth research and subjective evaluation. While we consider standard ranking factors and the elements of the job, ultimately the most important factor is who we believe will be an outstanding fit with the Town and the community as your next Town Manager.

Specifically, our efforts will involve:

**Step One. Resume Review.** CB&A will evaluate all resumes and identify the eight to fifteen candidates of the highest quality.

**Step Two. Screening Interview.** Our lead recruiters, and possibly other senior representatives of the firm, will interview each of the top candidates. Using what we learned in Phase I and our experience as managers and recruiters, as well as our unique ability to assess candidates, we will determine whether to consider each candidate further.

**Step Three. Evaluate the Best Candidates.** We will conduct thorough research into the backgrounds of the best six to twelve candidates. Specifically, CB&A will:

- **Ask the Candidates to Prepare a Written Introduction:** We will ask the candidates to answer a series of questions about themselves as an adjunct to their resumes and cover letters. By so doing, (1) the candidates can tell their story *in their own words*, and balance the negativity that is so often characteristic of the press, and (2) the Town to evaluate the candidates written communication skills.

## ***II. Proposed Work Plan*** *(continued)*

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- **Interviews of References:** We provide the candidate with a list of references with whom we wish to speak. These will include current and former elected officials, the municipal attorney, the external auditor, staff members, peers, news media representatives, the director of the local chamber of commerce, community activists, the Human Resources Director they work with, and others who know the candidate. All told, the list will include approximately 20 individuals. We will also attempt to contact some individuals who are not on the candidate's list. Typically, we reach eight to twelve people and prepare a written, approximately page long summary of each conversation.
- **Legal Checks:** Through our third-party vendor, American DataBank, we will conduct the following checks: criminal records at the county, state, and national level; civil records for litigation at the county and federal level; motor vehicle records; and bankruptcy and credit. As an aside, while only police departments have access to the gold standard for criminal records (the NCIC database), our vendor has developed a very reliable substitute.
- **Search the Internet, Newspaper Archives, and Social Media:** Virtually every local newspaper has an electronic archive that provides stories about perspective candidates, the issues they have dealt with, how they resolved them and the results. These articles can also provide valuable insights into the candidate's relationship with the public and the governing body. Of course, not all news sources are unbiased, and we consider that in our evaluation. Further, we will review the candidate's social media accounts.
- **Verification of Education and Work History:** We will verify all claimed educational degrees, as well as the candidate's work history for the past 15 years to ensure the candidate has been completely forthright.
- **Candidate Disclosure Statement:** We ask candidates to disclose anything controversial in their background that we need to be aware of. While it is unlikely that they will disclose anything we are not already aware of at this point, we believe redundant checks are beneficial.

As part of our efforts, we will crosscheck sources, search for discrepancies, and resolve them. When sensitive or potentially embarrassing items are discovered, they will be thoroughly researched. Depending on what we discover, we may decide to drop the candidate or to present them with an explanation.

*Note: We firmly believe that all background work and checks should be completed prior to presenting them to you. That way you will know the individuals you select to interview are all top performers and do not have anything embarrassing in their pasts that might come to light after selection. It also means that once you have made a selection, you can move forward promptly, negotiate a contract and make an announcement.*

### ***Task Five: Preparation and Presentation of Candidate Materials***

CB&A will select six to ten candidates and present them for your consideration as finalists. We will provide you electronically a complete written report for each recommended candidate which will include: the candidate's cover letter, resume, introduction, references, background checks

## ***II. Proposed Work Plan (continued)***

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and internet / newspaper archive search results. A complete sample candidate report is included as Appendix C. We will also provide advice on interviewing, a series of questions the elected officials may wish to ask (as well as outlining questions that are not appropriate to ask), and some logistical information.

### ***Task Six: Finalist Selection***

Approximately a week after the Town has received the candidate materials, CB&A will meet with the elected officials to discuss our findings and to select finalists (ideally five with an alternate) to be invited to interview.

### ***Task Seven: Notify All Candidates of Their Status***

We will notify the finalists by telephone and give them the opportunity to ask additional questions. Additionally, we will provide them with information concerning the interviews and travel if necessary.

CB&A will also contact those not selected to be interviewed. Part of the notification will include advice concerning their application materials, even though they were not selected to go forward, they will have gained something valuable from participating in the process.

## ***Phase IV: Coordinate the Interview Process and Town Manager Selection***

### ***Task Eight: Coordinate the Candidate Assessment Process***

Prior to the interviews, we will recommend an evaluation process including mechanisms to assess the candidates' communication skills, interpersonal skills, and decision-making skills. Typically, we suggest the Council observe the finalists in three settings: a social setting (since the selected candidate will frequently represent the Town at community functions), one-on-one interviews, and a Council meeting.

**Day #1:** The finalists are given a tour of the community by a knowledgeable staff member or resident. Communities often also include a reception with the Town's senior staff at this point.

Later, that evening, the Council can host a reception for the candidates. The purpose is to observe how the finalists respond to a social situation. As noted, your next Town Manager will, after all, represent your local government in a variety of venues. It is thus important to know how the individual will respond to your citizenry. The reception also serves as an icebreaker whereby the Council Members and the candidates get to know one another informally.

**Day #2:** The next morning, each candidate will interview individually with each Council Member for approximately 40 minutes. These meetings provide you with an opportunity to assess how the candidates might interact with you on an individual basis. Ultimately, Managers succeed or fail based on their interaction with the Council and its individual members. One-on-one interviews are an excellent way to test that interaction.

After lunch, the Council, as a group, will interview each finalist one at a time for approximately 30 minutes. Part of the interviews might include a PowerPoint presentation, so the Council can observe the candidates' presentational skills.

## ***II. Proposed Work Plan (continued)***

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We recommend you invite the finalists' spouses to the interviews, so they can become familiar and feel comfortable with the community.

Finally, if it would make you feel more comfortable, we can recommend several third-party management and personality assessment tools that the Town can use to provide additional input. They are available at a relatively small cost and are not included in our fee.

### ***Task Nine: Debriefing and Selection***

After the interviews are completed, we have developed a simple methodology that moves the elected body quickly and rationally to selecting your next Manager.

## ***Phase V: Negotiation and Continuing Assistance***

### ***Task Ten: Notification, Contract Negotiations and Warranty***

If requested, we will assist in the employment agreement negotiations. Generally, a member of the elected body and the attorney conduct the actual negotiations while we provide advice and assistance concerning the compensation package and contract. We can also take the lead role in the negotiations if desired. We have a standard contract you are welcome to use with the selected candidate. Your attorney, of course, will prepare the final contract. Since the basic parameters will have been discussed with the candidates, and the candidates have been thoroughly vetted, we expect prompt agreement.

### ***Task Eleven: Continuing Assistance***

Our work is not done when the contract is executed. We will stay in touch with you and your new Town Manager. Our goal is to be there to assist in resolving any issues that arise before they become intractable. We simply feel it is part of our job to ensure a successful relationship.

**Communications:** We will provide weekly reports about the status of the search, in writing or by phone, depending upon your preference. At significant milestones we will make the reports in person. We are also available at any time, day or night, to address any questions you have along the way. To do so, we will provide you with our cellphone numbers and you should feel comfortable contacting us whenever you have a question whether it is directly related to the search or, for that matter, anything else related to local government. We are, in addition to being exceptional recruiters, students of local government, and can often provide insights and names of parties who have dealt a wide variety of issues, often with innovative solutions. We want to be responsive and to assist in any way we can.

### ***The Town's Obligations***

The Town will be responsible for providing the facilities for the interview process, coordinating lodging for candidates from outside the area, and making arrangements for the reception. The Town will also be responsible for reimbursing the candidates (and spouses, if invited) for all expenses associated with their travel, meals, and incidentals for the interview process.

## ***II. Proposed Work Plan (continued)***

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### ***Proposed Project Schedule***

The following is the schedule we would suggest and assumes CB&A is selected to complete the search by February 19<sup>th</sup>. It can be adjusted based on the availability of the Mayor and Council.

#### ***Phase I: Needs Assessment / Information Gathering***

- |                             |                                                                                                               |
|-----------------------------|---------------------------------------------------------------------------------------------------------------|
| February 28 <sup>th</sup> : | CB&A begins meeting with the Council Members and other stakeholders to understand the job and its challenges. |
| March 11 <sup>th</sup> :    | CB&A submits the draft of the full recruitment profile to the Town for its review.                            |
| March 18 <sup>th</sup> :    | Town provides comments on the recruitment profile.                                                            |

#### ***Phase II: Recruiting***

- |                          |                                                                                                                                                                             |
|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| March 21 <sup>st</sup> : | CB&A posts the full recruitment profile on its website and submits it to the appropriate publications. It is also e-mailed to almost 14,000 local government professionals. |
| April 11 <sup>th</sup> : | Closing date for submission of applications.                                                                                                                                |
| April 16 <sup>th</sup> : | CB&A reports on the results of the recruitment.                                                                                                                             |

#### ***Phase III: Screening, Reference Checks and Credential Verification***

- |                        |                                                                                                                                                                                                                                                                          |
|------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| May 20 <sup>th</sup> : | CB&A forwards its reports and materials to the Town for the recommended candidates. These will include the candidates' cover letters, resumes and introduction as well as the results of our reference, background, and Internet/newspaper archives/social media checks. |
| May 27 <sup>th</sup> : | Town selects approximately five finalists and an alternate to interview.                                                                                                                                                                                                 |

#### ***Phase IV: Interview Process Coordination and Town Manager Selection***

- |                        |                                                                       |
|------------------------|-----------------------------------------------------------------------|
| June 5 <sup>th</sup> : | Town holds reception for the finalists.                               |
| June 6 <sup>th</sup> : | One-on-one and full Council interviews and selection of Town Manager. |

#### ***Phase V: Negotiation, Warranty & Continuing Assistance***

- |                 |                                                                                             |
|-----------------|---------------------------------------------------------------------------------------------|
| Post-Selection: | CB&A works with Town representatives and the selected candidate on an employment agreement. |
|-----------------|---------------------------------------------------------------------------------------------|



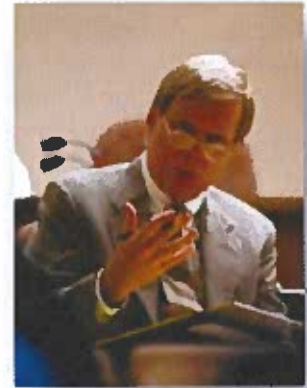
### ***III. Proposed Project Team***

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#### ***Project Team and Involvement***

Colin Baenziger & Associates has assembled an outstanding project team to serve your needs.

**Colin Baenziger**, Senior Partner, will have overall responsibility for the execution of the search. Mr. Baenziger has spent ten years in local government as a senior manager and over 30 years as a consultant. In addition to his 25 years in executive search, he specialized in operational reviews of governmental agencies and private sector clients such as the Recording Industry Association of America, and the Marriott Corporation. Mr. Baenziger has a master's degree with distinction in public administration from Cornell University's Graduate School of Management, and a Bachelor of Arts degree from Carleton College. He is also active in the International City Management Association and the Florida City and County Management Association.



**G. Scott Krim**, Managing Partner, has 20 years' experience in the public and private sectors and offers an abundance of managerial and analytical experience. He is a versatile leader with proven expertise in operations optimization, personnel selection and retention, and internal / external stakeholder relationships. Prior to joining our firm, Scott worked for five years in Utah's District Courts. He is a member of the Association for Public Policy Analysis & Management, the Society of Human Resource Management, and the American Communication Association. Scott has a Master of Public Administration (emphasis in state and local government) from Southern Utah University, and a Bachelor of Science in Organizational Communication from Weber State University in Ogden, Utah. Scott is a certified Professional and Technical Writer.



**Lynelle Klein**, Senior Vice President for Operations, is a skilled professional with extensive expertise in executive search. Starting as a research assistant with CB&A 12 years ago, she has now firmly established herself as the number two person at CB&A. Prior to joining the firm, she worked primarily in the private sector providing financial and administrative services. Ms. Klein has an associate degree from Brigham Young University in Rexburg, Idaho. She currently resides in Mesa County, CO.



### ***III. Proposed Project Team*** (continued)

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**Stephen Sorrell**, Senior Vice President, brings over 35 years of management and technical experience in municipal, county, state, and special district agencies in addition to his work with Colin Baenziger & Associates (CB&A). Some of the leadership positions Steve has held include serving as Executive Director, Emerald Coast Utilities Authority in Pensacola, Florida, and as City Manager, Director of Public Safety, Assistant City Manager, and Director of Finance, all for Hamilton, Ohio. He is a P.E. and earned a Bachelor of Science in Civil Engineering Degree from the University of Dayton, Ohio, and Master of Public Administration Degree from the University of Cincinnati, Ohio. He is a member of the International City/County Management Association, Florida City/County Management Association, Florida Finance Officers Association, American Water Wastewater Association, President of the Exchange Club, President of the Safety Council, Chairman of the Neighborhood Watch Program, and served on the Board of Directors for Senior Services and the Chamber of Commerce. One day, he hopes to slow down – just not yet.



**Ron Williams**, Senior Vice President. While Mr. Williams is technically relatively new to CB&A, he worked with the firm in its infancy and helped develop the operating methodology that has led to our growth and success. His public sector career began as a budget analyst for the City of Miami and culminated as the City Manager for Palmetto Bay (an affluent suburb of Miami, FL with 24,000 residents) and then for Live Oak (a rural city of 7,000 about 100 miles west of Jacksonville, FL). Along the way, he served in high level positions in the juvenile justice, public works, and general services. What excites him now is finding the people you need to fill your key positions, and he is exceptionally good at it. Ron has a Bachelor of Science in Management and a Master's Degree in Public Administration from the University of West Florida. He has also taught at Miami Dade College and in the County's public school system.



**Rick Conner**, Senior Vice President, has over 30 years of experience in executive recruiting and in local government (serving as a city manager in Florida and Texas) as well as a public works and utilities director. That experience provides him with an excellent perspective of the needs of local government operations and staffing. Rick earned Bachelor of Science Degrees in Business Administration and Engineering from the University of Missouri. He is a Registered Land Surveyor and a Professional Engineer in Missouri, as well as a Professional Engineer in Florida, Tennessee, and Texas. In his spare time, he invents scuba diving equipment and accessories.





## IV. References

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### ***Town Manager, Bay Harbor Islands, FL (population 5,938)***

**Contact:** Former Mayor and current Councilmember Stephanie Bruder at (305) 866-6241, or  
[sbruder@bayharborislands-fl.gov](mailto:sbruder@bayharborislands-fl.gov)



CB&A began its work in May of 2020 to find Bay Harbor Islands' next Town Manager. Our work included searching the nation to find the right person for the job, interviewing the candidates, conducting thorough background checks, and recommending finalists for the Town to interview. Through our targeted marketing and outreach efforts, we were able to bring an excellent pool of candidates to the Town. After careful deliberation, the Town selected *Maria Lasday, formerly the Village Manager for Bannockburn Village, IL* in August 2020. Ms. Lasday resigned in September 2024 and retired from the profession.

### ***Executive Director, Cape Fear Public Utility Authority, Wilmington, NC (serving a population of over 200,000)***

**Contact:** Lori McKoy, Human Resources Director, (910) 332-6659, or  
[Lori.McKoy@cfpua.org](mailto:Lori.McKoy@cfpua.org)



CB&A was selected in November 2020 to help find the Utility's next Executive Director. Our work included recruiting and advertising for candidates nationally, conducting background checks, selecting the most qualified, recommending them for interviews, coordinating the interview process, and assisting in the selection. We were asked to wait until January 2021 to formally begin the search so the hire could coincide with the current Executive Director's retirement. Interviews took place on March 29th and *Kenneth Waldroup, then Assistant Director of Public Utilities (Raleigh Water) for the City of Raleigh, NC*, was selected in April 2021. He remains with the Authority.

### ***City Manager, Doraville, GA (population 8,500)***

**Contact:** Former Mayor Donna Pittman at (678) 328-9181, or  
Mayor Joseph Geierman at 404.885.3557, or  
[joseph.geierman@doravillega.us](mailto:joseph.geierman@doravillega.us)



Doraville changed its charter in 2012 to become a city manager form of government. Although contracted to do just the City Manager search, we also assisted the City in preparing the implementing ordinances. Our work included scouring the nation to find the right person for the position, interviewing the candidates, conducting thorough background checks, and recommending finalists for the city to interview. *Mr. Shawn Gillen, City Administrator for Grand Rapids, MN*, was selected on January 14, 2013. Mr. Gillen became the City Manager for Tybee Island, GA in June of 2017. Our firm was hired to find his replacement. Ms. Regina Williams-Gates was hired in July of 2017 and she resigned in 2019 to pursue other opportunities. We were hired once again to find her replacement and *Chris Eldridge, former County Administrator for Horry County, SC*, was selected in May of 2020. Mr. Eldridge remains with the City.

## **IV. References** *(continued)*

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### **City Manager, Fruitland Park, FL (population 4,000)**

**Contact:** Commissioner Chris Bell at (352) 326-4291 or  
[cbell@fruitlandpark.org](mailto:cbell@fruitlandpark.org)

CB&A was hired in mid-July 2013 to find Fruitland Park's next City Manager. Rick Conner, CB&A's Senior Vice President assumed the Interim City Manager role to assist the City, stabilize the situation, and coordinate the recruitment. The process was challenging, but through extensive outreach efforts, CB&A fielded an excellent group of high-quality candidates for the position, performed background checks, coordinated the interview process, and assisted the City in selecting *Gary LaVenja*, former City Manager of *Maple Shade, NJ*. Mr. LaVenja retired in 2024, and we were hired to find his replacement. The Council did not come to terms with their selected candidate on the first search, so we readvertised the position and vetted more candidates at no additional cost to the City. *Karen Manila*, former Assistant City Manager for *North Richland Hills, TX* and Interim City Manager for *Fruitland Park*, was hired in January 2025.



### **Town Manager, Mooresville, NC (population 35,300)**

**Contact:** Mayor Pro Tem Eddie Dingler at (704) 799-4211  
or [edinlger@mooresvillenc.gov](mailto:edinlger@mooresvillenc.gov)

Mooresville a northern suburb of Charlotte, NC, and home to numerous NASCAR Teams. CB&A began work in March 2019, to find the Town's next Town Manager. We researched the Town including holding multiple meetings with community stakeholders, gathered input from key Town officials, recruited and advertised for candidates, thoroughly investigated background, selected, and recommended eight supremely qualified candidates, coordinated the interview process, and assisted with the offer letter. *Randy Hemann*, then Assistant City Manager for *High Point, NC*, was selected to serve as Mooresville's next Town Manager. Mr. Hemann left in 2023 to become the City Manager for *Oak Ridge, TN*.



### **County Manager, Union County, NC (population 198,600)**

**Contact:** Former Human Resources Director Mark Watson at  
(704) 283-3500, or [Watson@co.union.nc.us](mailto:Watson@co.union.nc.us)

CB&A was formally selected to perform the County Manager on September 7, 2010. We were asked to conduct the search extremely quickly so that interviews could be conducted prior to the November election. We sought candidates from around the country, performed the candidate screening and interviews were held on October 22<sup>nd</sup> with a selection made on October 25<sup>th</sup>. The Commission selected *Ms. Cynthia Coto*, formerly the County Manager of *Volusia County, FL*, and *Seminole County, FL*. Ms. Coto signed a contract on October 29<sup>th</sup> and began work on November 15<sup>th</sup>. Ms. Coto remained in her position until she retired at the end of 2018.



## ***IV. References (continued)***

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### **Candidate References**

While it is important to deliver what the Town expects, it is also important to keep candidates informed and to treat them with respect and dignity. Accordingly, we have provided references from five of those candidates.

<b>Placement</b>	<b>Recruited To Be</b>	<b>Contact at</b>
Dale Martin <i>Former City Manager for Winchester, CT</i>	City Manager, Fernandina Beach, FL <i>Appointed September 2015. He left in February 2023 and is currently the City Manager of Flagler Beach, FL.</i>	(904) 557-5047 dallmartin@yahoo.com
Eden Freeman <i>Former Assistant City Manager for Sandy Springs, GA</i>	City Manager, Winchester, VA <i>Appointed June 2014, she left in March 2020. She returned to Sandy Springs as the City Manager in January 2022.</i>	(404) 683-4816
Bryan Hill <i>Former Deputy Administrator for Beaufort County, SC</i>	Administrator, James City County, VA <i>Appointed July 2014. Hired as the Fairfax County, VA, CEO in January 2018.</i>	(843) 368-7458
Chris Morrill <i>Former Assistant City Manager for Savannah, GA</i>	City Manager, Roanoke, VA <i>Appointed December 2009. Hired as the Executive Director of the Government Finance Officers Association in 2017.</i>	(843) 368-7458
Raymond "Boz" Bossert, Jr. <i>Former Village Administrator for Port Edwards, WI</i>	General Manager, Sun 'N Lake of Sebring Improvement District, FL <i>Appointed July of 2023 and remains with the District.</i>	(706) 215-4567



## V. Fee and Warranty

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### Fee

CB&A offers a firm, fixed price of \$34,500, which includes all the expenses we will incur in the search with one exception. The Town will make a reservation and pay for one or two nights' stay for the CB&A representative in the same hotel as the finalists when they come to interview for the Town Manager position so we can help facilitate the final stage of the recruitment process, if needed. The only other expenses the Town will incur are those associated with bringing the finalists (and spouses, if invited) to interview with the Town (travel, meals, hotel etc.). Bills will be rendered as the search progresses and due at the end of each Phase as indicated below:

Requested Services	
Phase I: Needs Analysis / Information Gathering	\$ 4,000
Phase II: Recruiting	14,000
Phase III: Screening	14,000
Phase IV: Interview Process Coordination and Selection	1,500
Phase V: Negotiation and Warranty	1,000
<b>Firm, Fixed Fee Total</b>	<b>\$34,500</b>

If the Town asks us to perform work that is clearly beyond the scope of this proposal, it will be billed at a rate of \$200 per hour. No such work will be performed without your written authorization. Please note, as previously stated, that we have never billed nor requested additional funds beyond our originally quoted fee – even when circumstances suggested we were entitled to them and where the work we performed extended beyond the scope of our assignment.

### Warranty

Colin Baenziger & Associates offers one of the best warranties in the industry. We can offer it because we have confidence in our work. Provided we conduct the full search (each element of Phases I-V), and the Town follows our recommendations and selects from among the candidates we recommend, we warrant the following:

- 1) We will not approach the selected candidate for any other position as long as the individual is employed by the Town.
- 2) If the selected individual leaves for any reason other than an Act of God (such as total incapacitation or death) within the first year, CB&A will repeat the search for the reimbursement of our expenses only.
- 3) If you are not satisfied with the candidates we present, CB&A will repeat the search until you are satisfied.
- 4) Our price is guaranteed and will not be exceeded for any reason, even if conditions change after the contract is executed.



# COLIN BAENZIGER & ASSOCIATES

EXECUTIVE RECRUITING



## PROPOSAL TO PROVIDE EXECUTIVE RECRUITMENT SERVICES FOR THE TOWN OF HOLDEN BEACH, NC

### Volume II: Appendices

### ***Colin Baenziger & Associates***

#### **Contact Person:**

Colin Baenziger (561) 707-3537  
Colin Baenziger & Associates  
2055 South Atlantic Avenue • Suite 504  
Daytona Beach Shores, FL 32118  
e-mail: [Colin@cb-asso.com](mailto:Colin@cb-asso.com)  
Fax: (888) 635-2430

***...Serving Our Clients with a Personal Touch...***

# **PROPOSAL TO BE THE TOWN'S EXECUTIVE RECRUITING FIRM**

## **TABLE OF CONTENTS**

	<b><u>PAGE</u></b>
APPENDIX A: ALL GOVERNMENTAL SEARCH ASSIGNMENTS	<b>A-1</b>
APPENDIX B: SAMPLE RECRUITMENT BROCHURE	<b>B-1</b>
APPENDIX C: SAMPLE CANDIDATE REPORT	<b>C-1</b>
APPENDIX D: RESOLUTION OF ST. JOHNS COUNTY, FL	<b>D-1</b>
APPENDIX E: CB&A'S VETTING PROCESS FROM DALE MARTIN	<b>E-1</b>



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## **Appendix A**

***Searches by  
Colin Baenziger & Associates' Staff***

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## ***Governmental Search Assignments***

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### **Current Searches**

City Manager, Fort Walton Beach, FL (population 100,736)  
Town Manager, Juno Beach, FL (population 3,858)  
City Manager, Nome, AK (population 3,695)  
City Manager, Sarasota, FL (population 57,602)  
City Manager, Wilmington, NC (population 125,895)

### **Searches Completed in 2025**

City Manager, Fruitland Park, FL (population 8,615)  
City Manager, Longview, WA (population 37,722)  
City Manager, Seaside, CA (population 32,366)

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches Prior to 2024**

#### **Completed Searches – City/Town/Village Manager/Administrator**

City Manager, Albany, GA (population 75,600) in 2011  
City Manager, Ankeny, IA (population 45,600) in 2013  
City Manager, Ashland, KY (population 21,000) in 2013  
City Manager, Auburn, AL (population 58,582) in 2017  
City Manager, Aventura, FL (population 37,724) in 2017 and 2018  
Village Manager, Bal Harbour, FL (population 3,300) in 2013  
City Manager, Bartow, FL (population 16,000) in 2007 in 2017 and 2022  
Town Manager, Bay Harbor Islands, FL (population 5,628) in 2007, 2012 and 2020  
City Manager, Belle Isle, FL (population 7,344) in 2023  
City Manager, Bellevue, WA (population 122,400) in 2014  
City Administrator, Bradenton, FL (population 60,888) in 2021  
City Manager, Brighton, CO (population 41,254) in 2020  
Town Manager, Buckeye, AZ (population 32,000) in 2006  
City Manager, Burien, WA (population 55,188) in 2017  
City Manager, Cape Canaveral, FL (population 10,200) in 2010  
City Manager, Cape Coral, FL (population 194,570) in 2012 and 2020  
City Manager, Carnation, WA (population 1,873) in 2017  
City Manager, Casselberry, FL (population 25,000), in 2005  
City Manager, Chamblee, GA (population 17,000) in 2011  
City Manager, Clewiston, FL (population 7,270) in 2019  
City Manager, Cocoa Beach, FL (population 11,200) in 2012, 2015 and 2016  
City Administrator, Connell, WA (population 4,200) in 2014  
City Manager, Cooper City, FL (population 32,000) in 2008 and 2023  
City Manager, Coral Gables, FL (population 43,000) in 2009  
City Manager, Cottonwood Heights, UT (population 34,000) in 2004  
City Manager, Covington, VA (population 5,802) in 2016  
City Manager, Crescent City, FL (population 1,542) in 2020  
City Manager, Crystal River, FL (population 3,485) in 2024  
Town Manager, Cutler Bay, FL (population 35,000) in 2006  
City Manager, Dania Beach, FL (population 28,000) in 2009  
City Manager, Danville, VA (population 43,000) in 2016  
City Administrator, Davenport, IA (population 101,724) in 2024  
City Manager, Deerfield Beach, FL (population 78,000) in 2019  
City Manager, Delray Beach, FL (population 64,100) in 2014  
City Manager, Deltona, FL (population 83,000) in 2006, 2008, and 2024  
City Manager, Destin, FL (population 12,000) in 2003 and 2011  
City Administrator, Dickinson, ND (population 22,300) in 2018  
City Manager, Doral, FL (population 24,000), in 2004  
City Manager, Doraville, GA (population 10,896) in 2013, 2017 and 2020  
County Administrator, Dougherty County, GA (population 84,364) in 2024  
Town Manager, Dundee, FL (population 3,000) in 2006 and 2009  
City Administrator, Eagle Mountain City, UT (population 63,689) in 2024  
City Manager, Ellensburg, WA (population 18,350) in 2014  
City Manager, Elmira, NY (population 29,200) in 2014  
Village Manager, Estero, FL (population 26,600) in 2015

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – City/Town/Village Manager/Administrator (continued)**

City Manager, Fairborn, OH (population 33,200) in 2017  
City Manager, Fayetteville, NC (population 208,000) in 2012  
City Manager, Fernandina Beach, FL (population 11,000) in 2006, 2015, 2023 and 2024  
City Manager, Fife, WA (population 8,700) in 2010  
City Manager, Fircrest, WA (population 7,215) in 2023  
City Manager, Flagler Beach, FL (population 5,458) in 2023  
City Manager, Fort Myers, FL (population 68,190) in 2016  
Town Manager, Fort Myers Beach, FL (population 6,900) in 2006 and 2008  
City Manager, Fort Pierce, FL (population 41,900) in 2012  
City Manager, Fort Smith, AR (population 87,650) in 2016  
City Manager, Fort Walton Beach FL (population 20,879) in 2023  
City Manager, Fruitland Park, FL (population 4,100) in 2013  
City Manager, Gainesville, FL (population 133,857) in 2016 and 2019  
City Manager, Greensboro, NC (population 259,000) in 2009  
City Manager, Groveland, FL (population 12,493) in 2018  
City Manager, Hallandale Beach, FL (population 39,000) in 2010 and 2012  
City Manager, Holly Hill, FL (population 13,000) in 2008 (partial search)  
City Manager, Homestead, FL (population 62,000) in 2010  
City Manager, Indianola, IA (population 15,108) in 2015  
Village Manager, Islamorada, FL (population 7,500) in 1999, 2005, 2021 and 2022  
City Manager, Jacksonville Beach, FL (population 23,387) in 2018  
Town Manager, Juno Beach, FL (population 3,600) in 2005 and 2023  
Village Manager, Key Biscayne, FL (population 11,000) in 2007 and 2011  
City Manager, Key West, FL (population 24,600) in 2012  
Town Manager, Lady Lake, FL (population 15,954) in 2021  
City Administrator, Lake Forest Park, WA (population 13,059) in 2018  
City Manager, Lake Helen, FL (population 2,871) in 2024  
Town Manager, Lake Park, FL (population 9,100) in 2001 and 2003  
City Manager, Lake Worth Beach, FL (population 38,010) in 2003, 2007 and 2021  
Town Manager, Lantana, FL (population 9,600) in 2000 and 2021  
City Manager, Lauderdale Lakes, FL (population 32,000) in 1998 and 2002  
City Manager, Leesburg, FL (population 20,390) in 2013  
City Manager, Madeira Beach, FL (population 12,300) in 2011  
Town Manager, Mangonia Park, FL (population 1,400) in 2001  
City Manager, Marathon, FL (population 11,500) in 2002 and 2004  
City Manager, Marco Island, FL (population 15,000) in 2014  
City Manager, Mascotte, FL (population 5,873) in 2021  
City Manager, Medina, WA (population 3,000) in 2013  
City Manager, Melbourne, FL (population 72,500) in 2012  
City Manager, Miami Gardens, FL (population 101,000) in 2004  
City Manager, Mill Creek, WA (population 18,828) in 2015 and 2022  
City Manager, Miramar, FL (population 122,000) in 2013  
City Manager, Monroe, NC (population 33,500) in 2013  
City Manager, Montverde, FL (population 1,675) in 2020  
Town Manager, Mooresville, NC (population 41,995) in 2019  
City Manager, Mount Dora, FL (population 12,000) in 2005  
City Manager, Mount Pleasant, MI (population 26,000) in 2014

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – City/Town/Village Manager/Administrator (continued)**

City Manager, Mountlake Terrace, WA (population 20,700) in 2014 and 2016  
City Manager, Naples, FL (population 21,800) in 2018  
City Manager, New Smyrna Beach, FL (population 23,000) in 2009  
City Manager, Normandy Park, WA (population 6,335) in 2013 and 2015  
City Manager, North Miami, FL (population 62,000) in 2010 and 2014  
Village Manager, North Palm Beach, FL (population 12,500) in 2004, 2005, 2007 and 2012  
City Manager, North Port, FL (population 55,800) in 2011  
Town Manager, North Topsail Beach, NC (population 734) in 2018  
City Manager, Norwich, CT (population 40,500) in 2016  
Town Manager, Oakland, FL (population 5,400) in 2023  
City Manager, Oakland Park, FL (population 42,800) in 2014  
City Manager, Ocala, FL (population 52,000) in 2008 and 2015  
Town Manager/Finance Director, Ocean Ridge, FL (population 1,830) in 2023  
City Manager, Opa-Locka, FL (population 2,180) in 2019  
City Manager, Orange City, FL (population 10,000) in 2010 and 2016  
City Manager, Orange Park, FL (population 9,100) in 2010  
City Manager, Oviedo, FL (population 33,000) in 2008  
City Manager, Palm Bay, FL (current population 101,000) in 2002 and 2015  
City Manager, Palm Coast, FL (population 71,000) in 2006  
Village Manager, Palmetto Bay, FL (population 24,000) in 2003  
City Manager, Panama City Beach, FL (population 12,776) in 2012 and 2019  
City Manager, Parkland, FL (population 30,177) in 2017  
City Manager, Pascagoula, MS (population 21,330) in 2024  
City Manager, Petersburg, VA (population 32,701) in 2017  
Village Manager, Pinecrest, FL (population 19,300) in 2011  
City Manager, Pompano Beach, FL (population 101,000) in 2007  
City Manager, Port Orange, FL (population 67,494) in 2021  
City Manager, Port Richey, FL (population 2,869) in 2020 and 2023  
City Manager, Port St. Lucie, FL (population 174,100) in 2016  
City Manager, Portland, ME (population 65,000) in 2011  
City Manager, Prosser, WA (population 5,802) in 2016  
Chief Administrative Officer, Renton, WA (population 100,953) in 2021  
City Manager, Riviera Beach, FL (population 37,000) in 2009  
City Manager, Roanoke, VA (population 98,465) in 2009 and 2017  
City Manager, Sammamish, WA (population 64,548) in 2019  
City Manager, Sanibel Island, FL (population 7,319) in 2021  
City Manager, Sarasota, FL (population 55,000) in 2012  
City Manager, Satellite Beach, FL (population 10,100) in 2013  
City Manager, Savannah, GA (population 142,800) in 2016  
City Manager, Scottsdale, AZ (population 217,400) in 2013  
City Manager, Sebastian, FL (population 24,772) in 2018  
City Manager, Seminole, FL (population 17,800) in 2015  
City Manager, Sequim, WA (population 6,700) in 2015 and 2021  
Town Manager, Sewall's Point, FL (population 2,000) in 2006  
Township Manager, Spring Garden Township, PA (population 12,963) in 2018  
Township Manager, Springettsbury Township, PA (population 26,700) in 2014 and 2016  
City Manager, St. Pete Beach, FL (population 10,000) in 2014 and 2019

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – City/Town/Village Manager/Administrator (continued)**

City Manager, Stuart, FL (population 17,000) in 2006 and 2017  
City Manager, Sunny Isles Beach, FL (population 17,000) in 2006 and 2011  
City Manager, Sunrise, FL (population 84,400) in 2012  
City Manager, Sunnyside, WA (population 15,860) in 2013, 2018, and 2024  
Town Manager, Surfside, FL (population 6,000) in 2014  
City Manager, Tacoma, WA (population 200,000) in 2011 and 2017  
City Administrator, Tavares, FL (population 11,000) in 2006  
City Manager, Temple Terrace, FL (population 26,901) in 2022  
City Manager, Thornton, CO (population 144,388) in 2024  
City Manager, Titusville, FL (population 43,940) in 2014  
City Manager, Treasure Island, FL (population 6,937) in 2017  
City Manager, Vero Beach, FL (population 16,751) in 2019  
City Manager, West Melbourne, FL (population 15,000) in 2009  
City Manager, West Park, FL (population 12,000) in 2005 and 2010  
City Manager, Weston, FL (population 70,015) in 2019  
City Manager, Winchester, VA (population 28,108) in 2014 and 2020  
City Manager, Winter Haven, FL (population 37,900) in 2017  
City Manager, Yakima, WA (population 91,000) in 2011 and 2012

### **Completed Searches – County Administrator / Manager**

County Manager, Alachua County, FL (population 251,400) in 2014  
County Manager, Baker County, FL (population 27,000) in 2006  
County Administrator, Bay County, FL (population 158,000) in 2005  
County Manager, Brevard County, FL (population 536,000) in 2009  
County Administrator, Broward County, FL (population 1,800,000) in 2006  
County Administrator, Clackamas County, OR (population 383,900) in 2013  
County Manager, Clay County, FL (population 212,230) in 2005, 2011 and 2019  
Chief Administrator, El Paso County, TX (population 827,700) in 2014 and 2016  
County Administrator, Emmet County, MI (population 32,900) in 2014  
County Manager, Flagler County, FL (population 83,000) in 2007  
County Manager, Fulton County, GA, (partial search) in 2015 (population 894,300) in 2015  
County Administrator, Hernando County, FL (population 172,800) in 2012  
County Administrator, Highlands County, FL (population 98,000) in 2008  
County Administrator, Indian River County, FL (population 163,662) in 2023  
County Administrator, James City County, VA (population 69,000) in 2014  
County Manager, Lee County, FL (population 600,000) in 2009  
County Administrator, Martin County, FL (population 140,000) in 2005  
Borough Manager, Matanuska-Susitna Borough, AK (population 85,000) in 2011  
County Administrator, Manatee County, FL (population 422,774) in 2023  
County Administrator, Monroe County, FL (population 80,000) in 2004  
County Administrator, Nassau County, FL (population 60,000) in 2004  
County Administrator, Okaloosa County, FL (population 183,500) in 2013  
County Administrator, Okeechobee County, FL (population 39,000) in 2008  
County Manager, Osceola County, FL (population 235,000) in 2003 and 2007  
County Administrator, Polk County, IA (population 400,000) in 2007 and 2011

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – County Administrator / Manager (continued)**

County Manager, Seminole County, FL (population 410,000) in 2006  
County Administrator, St. Johns County, FL (population 162,000) in 2007  
County Administrator, St. Lucie County, FL (population 284,000) in 2014 and 2023  
County Manager, Union County, NC (population 198,600) in 2010  
County Administrator, York County, VA (population 66,269) in 2015

### **Completed Searches – Other Municipal CEO**

Executive Director, Bartow Municipal Airport Development Authority, Bartow, FL in 2017  
Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016  
General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016  
General Manager, Holiday Park Recreation District, FL (population 4,500) in 2007  
Executive Director, Lakewood Ranch Inter-District Authority, Manatee County, FL (population 15,000) in 2011 and 2022  
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003  
Executive Director, South Correctional Entity (SCORE), Des Moines, WA (population served 406,000) in 2018  
General Manager, Sun 'n Lake Improvement District, FL (population served 9,000+) in 2023

### **Completed Searches – Community Association CEOs and Assistant CEOs**

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016  
Executive Director, Sun City Summerlin Home Owners Association, Las Vegas, NV (population 14,000) in 2015 and 2017  
Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017  
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001

### **Completed Searches – Assistant/Deputy Managers**

Assistant City Manager / Operations, Corpus Christi, TX (population 308,000) in 2013  
Assistant City Manager / Utilities, Corpus Christi, TX (population 308,000) in 2014  
Deputy City Manager, Danville, VA (43,000) in 2016  
Deputy City Administrator, Dickinson, ND (population 22,300) in 2016  
Assistant County Manager, Douglas County, NV (population 49,628) in 2024  
Deputy City Manager for Community Building, Durham, NC (population 220,000) in 2009  
Assistant City Manager, Jacksonville, NC (population 72,800)  
Assistant Town Manager, Jupiter Island, FL (population 654) in 2010  
Assistant Village Manager, Islamorada, Village of Islands, FL (population 7,500) in 1998  
Assistant City Manager, Lake Worth Beach, FL (population 37,000) in 2004



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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Assistant/Deputy Managers (continued)**

Assistant County Administrator, Martin County, FL (population 140,000) in 2006  
Deputy City Manager, Sammamish, WA (60,000) in 2016  
Assistant City Manager, Tamarac, FL (population 55,500) in 2001  
Assistant City Manager, West Palm Beach, FL (population 101,000) in 2004 and 2013

### **Completed Searches – City or County Attorneys**

County Attorney, Clay County, FL (population 196,400) in 2016  
Corporation Counsel, Davenport, IA (population 101,724) in 2024  
City Attorney, Daytona Beach, FL (62,300) in 2016  
City Attorney, Deltona, FL (population 98,528) in 2024  
City Attorney, Fort Lauderdale, FL (population 178,752) in 2018  
City Attorney, Fort Pierce, FL (population 41,590) in 2016 and 2018  
County Attorney, Fulton County, GA (population 996,319) in 2015  
City Attorney, Lawton, OK (population 94,653) in 2020  
City Attorney, Moline, IL (population 42,452) in 2024  
City Attorney firm, Naples, FL (population 22,367) in 2021  
City Attorney, Ocala, FL (population 60,021) in 2022  
Chief Labor Negotiator, Orlando, FL (population 270,934) in 2018  
City Attorney, Port St. Lucie, FL (population 185,132) in 2016 and 2019  
County Attorney, Prince William County, VA (population 438,580) in 2015  
City Attorney, Roanoke, VA (population 96,000) in 2012  
City Attorney, Sebastian, FL (population 25,703) in 2023  
Fire District Attorney, St. Lucie County Fire District, FL (population 298,600) in 2017  
City Attorney, Vero Beach, FL (population 16,751) in 2019  
City Attorney, West Melbourne, FL (population 15,000) in 2008

### **Completed Searches – Community Development/Growth Management/Planning**

Planning and Community Development Director, Bradenton, FL (population 60,888) in 2021  
Growth Management Director, Collier County, FL (population 357,305) in 2015 and 2017  
Community Development Director, Danville, VA (population 43,000) in 2016  
Planning and Development Director, Fairfax County, VA (population 1,150,309) in 2022  
Director, Building and Development, Loudoun County, VA (population 336,900) in 2014  
Community Development Director, Miami, FL (population 408,000) in 2008  
Director of Planning, Building and Development, Roanoke, VA (population 96,000) in 2012  
General Manager, North Sarasota Redevelopment District, Sarasota, FL (population 53,000) in 2008  
Growth Management Director, St. Lucie County, FL (population 261,000) in 2005  
Community Development Director, Tamarac, FL (population 55,500) in 2007



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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Economic Development / Redevelopment**

Growth Management Manager, Wellington, FL (population 55,000) in 2009  
Executive Director, Camden County (GA) Joint Development Authority (pop. 51,400) in 2014  
Economic Development Director, Collier County, FL (population 328,000) in 2012  
Economic Development Director, Concord, NH (population 42,444) in 2017  
Assistant City Manager for Community Building, Durham, NC (population 220,000) in 2009  
Economic Development Director, Roanoke, VA (population 96,000) in 2012  
Director, Office of Economic & Workforce Development, Durham, NC (pop. 220,000), 2009  
Economic Development Director, Loudoun County, VA (population 326,000) in 2010  
Economic Development Director, St. Johns County, FL (population 162,000) in 2011 and 2024

### **Completed Searches – Engineers**

City Engineer, Gulfport, MS (population 90,000) in 2008  
Director/Engineering/Public Works /Utilities, Hallandale Beach, FL (population 39,000) 2013  
Deputy County Engineer, Martin County, FL (population 140,000) in 2006  
Assistant City Engineer, Melbourne, FL (population 75,000) in 2008  
City Engineer, Sunny Isles Beach, FL (population 17,000) in 2006  
Staff Engineer, Wellington, FL (population 55,000) in 2009

### **Completed Searches – Facilities Management**

Director, Performing Arts & Convention Center, Federal Way, WA (population 92,700) in 2015  
Director, Landscaping, Weston, FL (population 65,300) in 2013

### **Completed Searches – Finance and Budget**

Finance Director, Altus, OK (population 19,800) (background check) in 2012  
Finance Director, College Park, MD (population 32,256) in 2016  
Procurement Director, Collier County, FL (population 357,305) in 2016  
Finance Director, Danville, VA (population 43,000) in 2014  
Finance Director, Daytona Beach, FL (population 31,860) in 2012  
Finance Director, DeLand, FL (population 28,230) in 2016  
Finance Director, Escambia County (FL) Housing Authority (population served: 302,700), 2014  
Chief Financial Officer, Estero, FL (population 36,939) in 2022  
Finance Director, Fort Walton Beach, FL (population 20,000) in 2006  
Finance Director, Gainesville, FL (population 133,857) in 2020  
Finance Director, Groveland, FL (population 12,493) in 2018  
Director, Management & Financial Services, Loudoun County, VA (population 326,000) in 2012  
Manager, Office of Management & Budget, Lake Worth Beach, FL (population 37,000) in 2010  
Finance Director, Lauderdale Lakes, FL (population 32,000) in 1998  
Finance Director, Miami, FL (population 408,000) in 2013  
Finance Director, Miramar, FL (population 130,300) in 2016  
Treasurer, Miami, FL (population 408,000) in 2013  
Finance Director, Oregon City, OR (population 31,860) in 2012

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Finance and Budget (continued)**

Finance Director, Petersburg, VA (population 32,701) in 2017  
Finance Director, Roanoke, VA (population 99,000) in 2014  
Director of Finance and Administration, Roanoke Regional Airport, Roanoke, VA, in 2014  
Revenue Operations Director, Savannah, GA (population 142,800) in 2017  
Budget Director, St. Petersburg, FL (population 248,000) in 2009  
Finance Director, St. Petersburg, FL (population 248,000) in 2010  
Finance Director, Sunny Isles Beach, FL (population 17,000) in 2010  
Finance Director, Surfside, FL (population 5,700) in 2012  
Finance Director, Tamarac, FL (population 55,500) in 2005 and 2009  
Finance Director, West Palm Beach, FL (population 101,000) in 2007  
Chief Financial Officer, Winter Springs, FL (population 36,342) in 2022

### **Completed Searches – Fire/EMS/Dispatch**

Fire Chief, Cape Coral, FL (population 154,300) in 2013  
Fire Chief, Lauderdale Lakes, FL (population 32,000) in 1999  
Executive Director, Salt Lake Valley Emergency Communications Center, UT (estimated population served 900,000) in 2024  
Executive Director, South Sound 911 (serves a population of 808,000), Tacoma, WA, in 2013  
Fire Chief, St. Lucie County Fire District, FL (population 298,600) in 2018  
Fire Chief, West Palm Beach, FL (population 101,000) in 2005

### **Completed Searches – General Services / Administration**

General Services Director, Loudoun County, VA (population 349,700) in 2015

### **Completed Searches – Health and Human Services**

Director, Health and Human Services, St. Johns County, FL (population 162,000) in 2010

### **Completed Searches – Housing/Building**

Building Official, Jupiter Island, FL (population 580) in 2005 and 2010  
Building Official, Miami Beach, FL (population 91,000) in 2005  
Building Official, Sewall's Point, FL (population 2,000) in 2006  
Building Official, Tamarac, FL (population 55,000) in 2008

### **Completed Searches – Human Resources**

Human Resources Director, Boca Raton, FL (population 84,000) in 2006  
Human Resources Director, Cape Coral, FL (population 154,300) in 2013  
Director, Human Resources, Gainesville, FL (population 125,000) in 2014

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Human Resources (continued)**

Director of Personnel, Fulton County, GA (population 992,000) in 2010  
Director, Human Resources, Hillsborough County, FL (population 1,292,000) in 2015  
Human Resources Office, Loudoun County, VA (population 326,000) in 2011  
Human Resources Administrator, Martin County, FL (population 140,000) in 2007  
Personnel Director, North Miami, FL (population 56,000) in 2001  
Human Resources Director, St. Johns County, FL (population 334,173) in 2024  
Director, Human Resources, Sunrise, FL (population 88,800) in 2015  
Director, Human Resources, Roanoke, VA (population 99,000) in 2014  
Personnel Director, Vero Beach, FL (population 17,900) in 2003  
Human Resources Director, West Palm Beach, FL (101,900) in 2013 and 2014

### **Completed Searches – Information Technology**

Information Services Director, Cooper City, FL (population 33,382) in 2017  
Information Services Director, Lauderdale Lakes, FL (population 32,000) in 1998  
Information Services Director, Palm Beach County Tax Collector (population 1,300,000), Palm Beach County, FL in 2012 (partial search)  
Chief Information Officer, Weston, FL (population 65,300) in 2015

### **Completed Searches – Parks/Recreation/Libraries**

Parks and Recreation Director, Cape Coral, FL (population 179,804) in 2018  
Parks and Recreation Director, Deerfield Beach, FL (population 78,041) in 2017 and 2019  
Director, Parks, Recreation, & Conservation, Hillsborough County, FL (pop. 1,292,000) in 2015  
Director, Parks and Recreation, Hobbs, NM (population 35,000) in 2014  
District Manager, Holiday Park Recreation District, Palm Bay, FL (population 1,400) in 2007  
Libraries and Information Services Director, Newport News, VA (population 183,000) in 2017  
Library Services Director, St. Johns County, FL (population 162,000) in 2007  
Parks and Recreation Director, West Palm Beach, FL (population 101,000) in 2006  
Parks and Recreation Director, Weston, FL (population 70,015) in 2019

### **Completed Searches – Police**

Police Chief, Farmington, NM (population 45,900) in 2014  
Police Chief, Golden Beach, FL (population 355) in 2011 (partial search)  
Police Chief, Indian Creek Village, FL (population 89) in 2022  
Police Chief, Lauderhill, FL (population 66,900) in 2011 (partial search)  
Police Chief, Melbourne, FL (population 76,000) in 2011 (partial search)  
Chief of Police, Mooresville, NC (population 35,300) in 2016  
Police Chief, Petersburg, VA (population 32,701) in 2017  
Director of Administration – Public Safety, Ocean Reef Community Association, Key Largo, FL in 2016  
Police Chief, Sewall's Point, FL (population 2,000) in 2007  
Police Chief, St. Augustine Beach, FL (population 6,200) in 2012  
Police Chief, Sunny Isles Beach, FL (population 17,000) in 2010  
Police Chief, Winchester, VA (population 27,216) in 2017

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Public Works**

Public Works Director, Aventura, FL (population 37,200) in 2016  
Public Works and Utilities Director, Bradenton, FL (population 56,730) in 2024  
Public Works Director, Camden County, GA (population 53,044) in 2019  
Solid Waste Director, Camden County, GA (population 53,044) in 2018  
Public Works Director, Chandler, AZ (population 250,000) in 2007  
General Manager, Chittenden Solid Waste District, Williston, VT (population 157,461) in 2016  
Executive Director, Northern Palm Beach Improvement District, Palm Beach Gardens, FL (population 200,000) in 2003  
Vice President, Public Works & Operations, Ocean Reef Community Association (population 2,000), Key Largo, FL, in 2001  
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012  
Public Works Administrator, Renton, WA (population 100,953) in 2020  
Public Works Director, Sammamish, WA (60,000) in 2016  
Director/Capital Projects Manager/City Engineer, Sunny Isles Beach, FL (pop. 17,000) in 2007  
Assistant Public Works Director, Sumter County, FL (107,000) in 2015  
Assistant Public Works Director, Sunny Isles Beach, FL (population 17,000) in 2008  
Public Works Director, Tamarac, FL (population 55,500) in 2003  
Solid Waste Director, Tampa, FL (population 335,700) in 2014  
Director, Landscaping, Weston, FL (population 65,300) in 2013

### **Completed Searches – Transportation**

Chief Executive Officer, Chatham Area Transit, Savannah, GA (population served 286,900) in 2016 and 2022

### **Completed Searches – Utilities**

Water Resources Director, Asheville, NC (population 87,200) in 2015  
General Manager, Beaufort-Jasper & Sewer Authority, SC (population served 150,000) in 2023  
Public Works and Utilities Director, Bradenton, FL (population 56,730) in 2024  
Executive Director, Cape Fear Utility Authority, Wilmington, NC (population served 230,000) in 2021  
Utility Director, Danville, VA (population 43,000) in 2015  
Power & Light Division Director, Danville, VA (population 43,000) in 2015  
Water and Gas Director, Danville, VA (population 43,000) in 2016  
Utilities Manager, Deerfield Beach, FL (population 78,041) in 2017  
Watershed Management (Water and Wastewater) Director, DeKalb County, GA (population 691,900) in 2011 and 2013  
Executive Director, Des Moines (IA) Water Works (serves a population of over 500,000) in 2012 and 2020  
Executive Director, Emerald Coast Utilities Authority, Pensacola, FL (population served 300,000) in 2020  
Executive Director, Florida Keys Aqueduct Authority, Key West, FL (pop. 90,000) in 2003  
General Manager, Island Water Association, Sanibel, FL in 2018  
Utilities Director, Lake Worth, FL (population 37,000) in 2009

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## ***Governmental Search Assignments*** (continued)

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### **Completed Searches – Utilities (continued)**

Deputy Water & Sewer Director, Miami-Dade County, FL (population 2.706 million) in 2023  
Waterworks Director, Newport News, VA (population 183,000) in 2017  
Executive Director, Onslow Water & Sewer Authority, Jacksonville, NC, (pop. 160,000) in 2009  
Utilities Director, Palm Bay, FL (population 101,000) in 2005  
Utilities Director, Panama City, FL (population 38,286) in 2017  
Executive Director, Environment and Infrastructure, Pinellas County, FL (pop. 917,000) in 2012  
Executive Director, Sewerage and Water Board of New Orleans, LA (population 369,000) in 2013  
Customer Service Chief (a C Suite level position), Sewerage and Water Board of New Orleans, LA (population 369,000) in 2020  
Director, South Martin Regional Utilities, FL (population 22,000) in 2013  
Executive Director, Spartanburg Water, SC (population served 327,997) in 2022  
Water (Wastewater) Resources Director, St. Petersburg, FL (population 248,000) in 2008  
General Manager, Tampa Bay Water, FL (population served 2,400,000) in 2008 and 2021  
Chief Operating Officer, Tampa Bay Water, FL (population served 2,400,000) in 2022

### **Completed Searches – Work Force Management**

Director, Office of Economic & Workforce Development, Durham, NC (pop. on 220,000), 2009

### **Completed Searches – Other**

Chief Operating Officer, Amelia Island Plantation Community Association, FL (population 3,000) in 2016  
Clerk to the County Commission, Fulton County, GA (population 1.02 million) in 2018  
Director, Registrations and Elections, Fulton County, GA (population 992,000) in 2009  
Special Projects Coordinator, Islamorada, Village of Islands, FL (population 7,500) in 1998  
City Clerk, Lauderdale Lakes, FL (population 32,000) in 1998  
Assistant to the City Manager, North Myrtle Beach, SC (18,790) in 2023  
Vice President for Administration, Ocean Reef Communication Association, Key Largo, FL in 2017  
Environmental Resources Director, St. Lucie County, FL (population 261,000) in 2009



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## **Appendix B**

***Sample Brochure:  
Town Manager  
North Topsail Beach, NC***

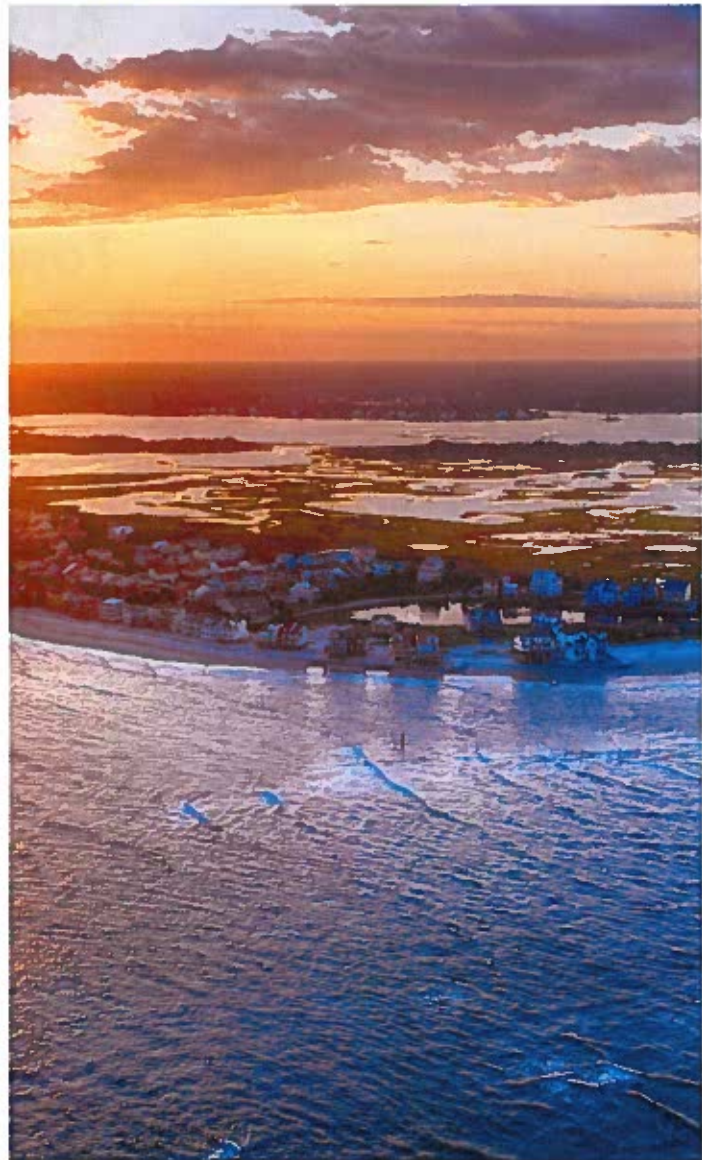
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Town Manager Position Available  
Apply by March 23, 2018



## Welcome to the Town of North Topsail Beach

Just off the coast of North Carolina, a 26-mile-long barrier island is home to one of the state's hidden treasures: North Topsail Beach. USA Today recently named it one of the Top 10 Family Beaches in the Country and TripAdvisor put it on its 2016 list of Must-See Small-Town Beach Destinations. The latter described Topsail Island (which includes North Topsail Beach, and parts of Surf City and Topsail Beach), as "a place to enjoy the beach in its purest, simplest form" without the "crowds or chaos" of other coastal towns. The town's motto's is, "Nature's Tranquil Beauty," and it is appropriate. It is a place where you can enjoy the water, shoreline, salt marshes and recreation in a tranquil environment. Even with more visitors coming every year and with more homes, the town remains quiet and scenic, and is an excellent place to put down roots. Simply put, the quality of life here is unmatched.



North Topsail Beach takes pride in its 11.1 miles of uncongested beach, as well as the myriad of available outdoor activities. Nature is plentiful and diverse. Here you can hike, bike, watch birds or take to the water. Boating, kayaking, and fishing are exceptional. The ocean, Intracoastal Waterway, the estuaries and salt marshes along the northwestern side of the island make the area an angler's paradise. During the spring, summer and fall, fishermen can expect to find sheepshead, spot, tarpon, red drum, Spanish mackerel, bluefish, whiting, trout, flounder, amberjack, striped bass, croaker, white marlin, blue marlin, sailfish, wahoo and dolphin. The winter offers opportunities to catch king mackerel, sea bass and tuna in the ocean and striped bass in the rivers. We should also mention the numerous shrimp, oysters, and crabs found here. The Seaview Pier stretching into the Atlantic is a wonderful place to get some bait, grab some gear if you need it and cast a line.

Residents and tourists alike treasure the loggerhead sea turtles who annually lay their eggs on the beach. The world-renown Karen Beasley Sea Turtle Rescue and Rehabilitation Center is just over the Surf City bridge and nurses ailing turtles back to health. It is one of North Carolina's most popular tourist attractions.

The town itself offers many access points to the beach and number of small parks with tennis and pickle ball courts. Those who like golf will find a very nice course nearby on the mainland. Ample opportunities for hunting are close by. Those who enjoy culture will be pleasantly surprised. Between the nearby cities of Jacksonville (22 miles north) and Wilmington (45 miles southwest), you can find virtually everything you want. The latter offers Thalian

Hall (hosting 250 events annually) and the University of North Carolina at Wilmington sponsors numerous other events.

For a taste of the city, what could beat Raleigh or Charlotte, NC? The former is two hour and 30 minutes northwest and offers numerous museums, cultural venues, and the NHL's Carolina Hurricanes as well as minor league teams in soccer and baseball. The presence of North Carolina State in Raleigh adds to the city's cultural aspects as well as providing serious college athletics. A bit further away, roughly four hours from North Topsail Beach, lies Charlotte, the third-fastest growing major city in the United States and the 17th most populous. The city offers many notable attractions, the most popular including the Carolina Panthers, the Charlotte Hornets, the NASCAR All-Star Race, the NASCAR Hall of Fame, the Charlotte Ballet, Carowinds amusement park, and the U.S. National Whitewater Center. The city has museums and theaters aplenty, as well as an aquarium, making it an exciting getaway for a weekend. If that is not enough, you can fly out of Jacksonville or Wilmington, or drive a few hours to Raleigh-Durham, Greensboro or Charlotte Douglas International Airports and be anywhere in the world relatively quickly.

But back to North Topsail Beach. It is simply a great place to live, work and play. Crime is very, very low—85% lower than the national average and 90% safer than other cities in the United States. During the summer, traffic control and alcohol-related issues are what the police department spends most of its time with. Onslow County Schools provides a good public education through Dixon Elementary, Dixon Middles and Dixon High School. All



are strong and according to GreatSchools.org, Dixon High is above average compared to other high schools in the state.

Homes here vary greatly in price. While some can be found in the low to mid-\$200,000's, many are much higher (generally between \$1 and \$2 million). Do not be put off by the upper end of the scale, however. For the most part, these are huge (eight to ten bedrooms) and vacation rentals. In fact, 85% of the homes in the town are rentals and the high-end ones can cost \$12,000 to \$17,000 per week during peak season. Less expensive alternatives for permanent housing are available across the Intracoastal Waterway in Sneads Ferry and Holly Ridge.

Most important though are the people who live here. While the summer time population can grow the 20,000+, the number of permanent residents is relatively small in number—the U.S. Census estimates the 2016 population to be 1,104—and they are extremely friendly, helpful and welcoming. Neighbors truly know their neighbors and help one another.

North Topsail Beach is amidst an exciting time. Previously one of North Carolina's best-kept secrets, it's clear the word is out. It is an easy place to fall in love with—a coastal jewel and the right town manager will help shape its future at this crucial time.

HISTORY

While the area’s early history is not well known, Permuda Island (a 1.5-mile-long island in the Intracoastal Waterway and part of the town) shows evidence of occupation as early as 300 B.C. Various myths explore the origins of Topsail Island’s name. One suggests it was named for the top sails of buccaneer ships. The pirates would hide behind the island in the 1700s with lookouts stationed at the top of the masts. When they spotted a passing merchant ship, the pirates would pounce. More likely, however, it was named after the New Topsail Inlet which appeared on early navigational charts.

During the Revolutionary and Civil Wars, Topsail Island became a large producer of salt. Prior to refrigeration, it was important for preservation purposes. Later, legends had Black Beard’s treasure was buried here and that brought treasure hunters to search the maritime forests and along the shores. As local farmers began to settle on the mainland, they drove their livestock at low tide to the island to eat the wild beach grass. A few shelters (probably less than a dozen) were built for fishing and picnicking and other summer recreational purposes.

At the beginning of World War II, the U.S. Army took possession of the island and built a large, temporary anti-aircraft training base known as Camp Davis. They also built the road from the base to the sound and installed a pontoon bridge across the Intracoastal Waterway. Other training facilities and support buildings were constructed. Immediately after the war, the US Navy took possession of the island and began a joint project with Johns Hopkins University known as Operation Bumblebee which was

an early, guided-missile development program. Over 200 missiles were test fired. To photograph and collect telemetry data along the flight path of these missile tests, a series of three-story concrete towers were constructed at appropriate intervals from the south end to the north end of the island. While most were removed after the US missile program moved to Cape Canaveral, Florida in 1948, a few still stand today with some converted into oceanfront homes. The roads, bridge, and other infrastructure left behind became Surf City’s business district. In 1949, in the days of segregation, Ocean City developed in the south

Table 1: North Topsail Beach Demographics

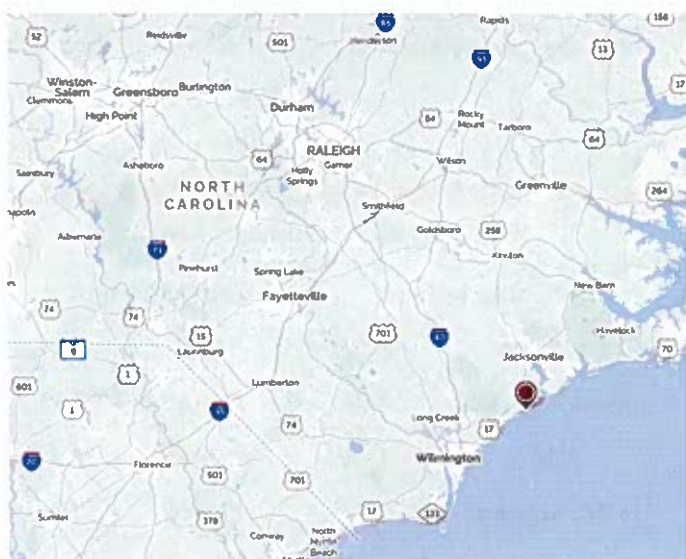
Estimated 2016 Population: 1,104			
Distribution by Race		Distribution by Age	
Caucasian	91.5%	0 to 15	9.4%
African American	3.4%	15 to 25	8.4%
Asian	2.4%	25 to 45	31.5%
Native American	0.0%	45 to 65	28.1%
Two or More Races	2.7%	65 to 85	21.6%
Total	100%	Over 85	1.0%
Hispanic (all races)	2.2%		

Educational Achievement (over age 25)	
High School or Higher	98.6%
Bachelor’s Degree or Higher	47.0%

Other Statistics	
Median Age-North Topsail Beach	46.1
Median Age-U.S.	37.4
Poverty Rate	9.4%

Source: U.S. Census Bureau





end of what has become North Topsail Beach so African Americans could purchase beachfront property in North Carolina. Many of these homes remain in the hands of their heirs. In the early 1950s, developers began to arrive. The process was slowed, however, when the storm surge from Hurricane Hazel in 1954, completely flooded Topsail Island washing away most structures. Since then, homes have been built on pilings.

Over time, North Topsail Beach became a vacation destination. The town was incorporated in 1992, and it has grown slowly but steadily since.

## DEMOGRAPHICS

See Table 1 on page 4, for demographics.

## CLIMATE

North Topsail Beach boasts warm and temperate oceanside days, with regular precipitation. In July, the average high temperature is around 88°F and the lows average 71°F. January averages are highs in the mid-50s and lows in the low 30s. Topsail Island has sunshine 70% of the year.

## GEOGRAPHY

Located in Onslow County, North Topsail Beach covers the northern 11.1 miles of Topsail Island and sits on North Carolina's Atlantic coast.

It is long and narrow (see map). Parts of the town are higher than others but overall, North Topsail Beach lies only a few feet above sea level. Earlier this decade, a number of homes had to be demolished due to beach erosion and the fact that they were no longer on dry land. Sand bags protect other homes in the vicinity.

## COMMERCE

Aside from the large number of vacation rental properties, commerce in North Topsail Beach is limited. Shopping can be found at Roger's Bay Convenience Store, the Tiki Mart, a few shops in St. Regis Condominiums, and a bait and tackle shop at the Seaview fishing pier. Residents tend to travel to the mainland or next door to Surf City for most goods and services. In terms of dining out, the three options in town

are a restaurant atop of the St. Regis Condominiums, the Seaview Restaurant at the pier (although the latter is not open year round) and a small restaurant at the Rogers Bay Campground.

The area’s principal employer is Marine Corps Base Camp Lejeune (with over 47,000 marines and sailors). It and other significant area employers are on the mainland and listed in Table II.

THE GOVERNMENT

The Town of North Topsail Beach prioritizes conservation and low-density development. It operates under the council-manager form of government. The Board of Aldermen is composed of the mayor and five aldermen. The mayor is elected every two years by a direct vote of the citizens. He/she runs the meetings and votes in the rare

case of a tie. Aldermen are elected to staggered four year terms with elections occurring in odd numbered years.

The current members have served a range of 2 to 10 years, and they are responsible for appointing the town manager and the town attorney. They presently operate in a collegial fashion and have a high regard for staff.

The general fund budget for FY 2017-2018 is a little over \$4.2 million. Revenues come from the state (\$1,259,000), property tax (\$2,007,000), refuse (\$451,000), the town (\$248,000), interest (\$25,000), and other sources (\$218,000).

The general fund ad valorem tax rate is \$.2361 per \$100 of valuation. Of the general fund, approximately 29% is spent on police, 20% on fire (the town has two stations), 13% on public works (facilities, grounds and streets), 11% for sanitation collections, and 10% for administration (which includes finance and the town manager). The remaining

functions each account for less than 10% of the budget. North Topsail Beach’s total budget is \$16.1 million dollars. The difference between it and the general fund budget is composed of the shoreline/capital fund (\$11.1 million) and the beach maintenance fund (\$700,000).

The town has 34 employees, seven of whom work under the Town Manager’s direct supervision. North Topsail

Table 2: Principal Employers, Onslow County, NC

Employer	Industry	Employees
USMC Base, Camp Lejeune	Military	1,000+
Department of Defense	Government	1,000+
Onslow County Board of Education	Education	1,000+
Camp Lejeune MCCS	Military	1,000+
Walmart	Retail	1,000+
Onslow County Government	Government	1,000+
Onslow Memorial Hospital	Healthcare	1,000+
Coastal Carolina Community Group	Education	500-999
Convergys Customer Mgmt Group	Market Research	500-999
Food Lion	Grocery	500-999

Source: Onslow County, NC 2016 CAFR



Beach is a full service community with the exception of solid waste (contracted out), water (provided directly to residents by the Onslow County Water and Sewer Authority), and wastewater (provided by Pluris, a private firm).

## THE CHALLENGES AND OPPORTUNITIES

North Topsail Beach does not have any serious short terms issues. It is financially sound but needs to continue to manage its resources wisely.

The biggest current challenge is balancing municipal infrastructure and staff needs during periods when tourists flock to the island (increasing the population 20-fold) versus periods when essentially only the permanent residents are present.

In the longer term, the most daunting issue is ensuring future growth (almost all the available land is already subdivided and can be built upon) does not compromise the town's amazing quality of life. It will not be easy. A third issue is, although infrequent and typically not overly intense, the area is subject to hurricanes. They require preparation and recovery. That said, the last category 3 or higher storm to strike the area was Hurricane Fran (category 3) in 1996. Fourth, and particularly important, is beach erosion, the resulting need for beach renourishment, and the attendant costs. The other significant issues are coastal regulatory issues.

## THE IDEAL CANDIDATE

North Topsail Beach is seeking an outstanding leader and manager. The individual will work in tandem with the Board of Aldermen to resolve issues and protect the town's quality of life. The manager will be someone who keeps the elected officials well informed and presents them with a recommendation as well as options. He/she will earn their trust and be a valued advisor as well as someone who is confident, polished, and professional. The manager will make his/her opinion known (in a constructive and diplomatic way) and not be a "yes" man or woman. The individual will be visionary yet down to earth and practical.

The manager will be a strategic thinker and planner. While professional, the ideal candidate will be friendly and outgoing. He/she will be comfortable with and interact extremely well with the public.

Outstanding people skills will be critical. The individual will not be someone who sits behind his/her desk all day but rather spends time in the community with residents, listening to their concerns and actively working towards finding ways to make North Topsail Beach the best it can be.

Personally, the ideal candidate will be energetic, highly motivated, someone with outstanding communications skills (both oral and written) and a "can do" attitude.

North Topsail Beach has a lean workforce so he/she should expect to wear many hats and pitch in when needed. Being able to prioritize work and manage competing projects will be essential. The individual will work collaboratively with

staff—not just providing direction and delegating but by empowering and inspiring staff. Micromanagement will not be a word in the manager's vocabulary. Instead he/she will be respectful, mentor, set priorities, provide resources, have high expectations, listen, and expect deadlines to be met. Informal feedback will be regular, ongoing and verbal throughout the year while formal written performance reviews will be conducted at least annually.

Strong analytical skills will be necessary and the next manager will be constantly seeking for ways to improve operations. The individual will be savvy technologically and realize the importance of incorporating proven, new technologies. The manager will have a sense of urgency and not accept the typical glacial pace of government internally or externally.

As a small town, North Topsail Beach must work regularly and closely with other governmental agencies. Hence the ability to build and maintain very positive relationships with external agencies in nearby cities, and at the county, state and federal levels will be critical to the next manager's success.

Particularly important will be having a sound knowledge and experience with the challenges faced by coastal communities. These include the challenges mentioned previously as well as the ability to work with contractors and to hold their feet to the fire when required.

The ideal candidate will have a Bachelor's Degree in business or public administration or another related area. The best candidates will have at least eight years' experience as a city manager or assistant and expertise in local



government planning, budget, and economic development/ redevelopment. North Carolina government experience is preferred but not mandatory. Candidates should already be coastally savvy. The Town of North Topsail Beach simply does not have time to wait for a manager to become familiar with coastal aspects of a barrier island town.

## COMPENSATION

The salary range is \$90,000 to \$140,000 annually. Actual salary will depend on qualifications. The Town will pay at the top of the range for an outstanding candidate. Benefits are excellent. The town manager will be part of the North Carolina Local Government Employees' Retirement System.

## THE MOST RECENT TOWN MANAGER

The most recent Town Manager resigned after almost five years of service stating it was time for a change.

## RESIDENCY

While it would be preferable if the next Town Manager resided within North Topsail Beach's corporate limits, it is not expected. The town does, however, want the manager to live within a reasonable commuting distance so he/she can be there on weekends from time to time.

## HOW TO APPLY

E-mail your resume and cover letter to [Recruit37@cb-asso.com](mailto:Recruit37@cb-asso.com) by March 23rd. Direct questions to Colin Baenziger at (561) 707-3537 or Lynelle Klein at (425) 658-7025.

## INTERNAL CANDIDATES

No internal candidates are anticipated

## CONFIDENTIALITY

Under North Carolina law, all candidate names must be held in the strictest of confidence and cannot be released without the permission of the candidate(s).

## THE PROCESS

Applications will be screened between March 24th and April 18th. Finalists will be selected on April 19th. Interviews will be held on April 27th with a selection shortly thereafter.

## OTHER IMPORTANT INFORMATION

North Topsail Beach is an Equal Opportunity Employer and encourages women, minorities and veterans to apply.

## ADDITIONAL INFORMATION

For additional information about the town visit:

<https://www.ntbnc.org/>

<http://www.topsailchamber.org/north-topsail-beach.html>

COLIN BAENZIGER  ASSOCIATES  
EXECUTIVE RECRUITING

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## **Appendix C**

### ***Sample Candidate Report***

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[Note: The following materials are provided with the permission of the candidate.]

## **TABLE OF CONTENTS**

	<b><u>PAGE</u></b>
COVER LETTER AND RESUME	<b>1</b>
CANDIDATE INTRODUCTION	<b>5</b>
BACKGROUND CHECKS	<b>13</b>
CB&A REFERENCE NOTES	<b>17</b>
INTERNET SEARCH	<b>27</b>

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*Cover Letter and Resume*

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Karen Manila  
6909 Herman Jared Dr.  
North Richland Hills, TX 76182  
(817) 999-0967  
krmanilatx@gmail.com

May 6, 2024

To Whom It May Concern,

My name is Karen Manila and I am writing this cover letter to express my interest in the City Manager position with the City of Fruitland Park, FL. While I currently live in Texas, my husband and I will soon be relocating to Florida which provides me the opportunity to seek employment in an area that I am well suited for. With more than 30 years of experience in local government, I have the skillset needed to be a successful City Manager.

My most recent position was as Assistant City Manager for the City of North Richland Hills, Texas (population ~72,000). I served the City of North Richland Hills for 25 years, starting as the City's Budget Director before promoting into the City Manager's Office first as Managing Director then to Assistant City Manager. During my 21 years in the City Manager's Office, I had responsibility for multiple departments including Finance, Budget & Research, Information Technology, Human Resources and Municipal Court. Additionally, for a period of time I oversaw the Parks Department and Neighborhood Services which includes Consumer Health, Code Enforcement and the Animal Shelter. I also have extensive experience in budgeting having worked as a budget analyst for the City of Garland for 5 ½ years, Budget Director for the City of North Richland Hills, and oversight of the Budget Department for the last 21 years. Additionally, in my role as Assistant City Manager, I was the City's liaison with franchised utilities (electricity, natural gas, communications), a member of the City of Fort Worth wholesale water customers committee, served on the board of directors for the Texas Coalition for Affordable Power, oversaw the city's trash and recycling contract, and performed legislative analysis/tracking every 2 years when the Texas Legislature was in session.

Thank you for taking the time to review my resume. As you'll see, my experience in local government translates well to what the City of Fruitland Park is seeking in a City Manager. I look forward to learning more about this exciting opportunity and hope to speak with you in more detail soon.

Sincerely,

Karen Manila

# Karen R. Manila

6909 Herman Jared Dr., North Richland Hills, TX 76182 | 817.999.0967 | [krmanilatx@gmail.com](mailto:krmanilatx@gmail.com)

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*A proven leader with over thirty years of experience leading teams to achieve city council and organizational goals. Proven track record in strategic planning, team development and operational analysis. Adept at fostering a customer oriented culture of collaboration and innovation.*

## **EXPERIENCE**

**2008 – 2024**

### **ASSISTANT CITY MANAGER, CITY OF NORTH RICHLAND HILLS, TX**

- Oversight of Finance, Budget, Information Technology, Human Resources, Municipal Court
- Previously oversaw Facilities, Fleet, Parks, Neighborhood Services
- Liaison with franchised utilities including Oncor, Atmos Energy, AT&T, Spectrum
- Liaison with external organizations concerning utility issues and wholesale water
- Oversight of solid waste and recycling contract
- Developed Federal and state legislative programs, tracked bills, reported to elected officials on legislation, drafted correspondence for Mayor to state and Federal officials concerning legislative impact to City
- Oversaw development of City operating and capital improvement program budgets
- Assist with revenue and expenditure projections
- Perform financial analysis of department supplemental budget requests
- Developed policy on use of natural gas drilling revenues within city limits
- Project manager for Enterprise Resource Planning replacement
- Served on board of directors for Texas Coalition for Affordable Power
- Assisted residents with complaints/concerns
- Processed invoices, p-card transactions and payroll in absence of admin assistant
- Special projects, research, other duties as assigned

**2002 – 2008**

### **MANAGING DIRECTOR, CITY OF NORTH RICHLAND HILLS, TX**

- Oversight of Finance, Budget, Information Technology, Human Resources
- Oversaw development of City operating and capital improvement program budgets
- Assisted residents with complaints/concerns
- Special projects, research, other duties as assigned

**1999 – 2002**

### **DIRECTOR OF BUDGET & RESEARCH, CITY OF NORTH RICHLAND HILLS, TX**

- Coordinated with departments in development of citywide operating and capital improvement program budgets
- Performed revenue forecasts, salary and benefit projections, and tracked actual expenditures to budget projections
- Reported actuals to budget to City Manager and City Council

- Trained new employees on budget process and budget software system
- Performed internal audits as needed

1994 – 1999

**FINANCIAL ANALYST/SENIOR FINANCIAL ANALYST, CITY OF GARLAND, TX**

- Responsible for oversight of 8 funds and 23 departments with annual budgets exceeding \$221 million
- Administration of the City's vehicle replacement program
- Development and administration of G&A and support service allocation methodologies
- Implementation and administration of an automated budget preparation system
- Development and coordination of the annual budget instruction manual and budget training
- Participate in budget preparation meetings with City Council, City Manager, Assistant City Managers, and department heads

1992 – 1994

**FINANCE DIRECTOR, CITY OF KAUFMAN, TX**

- Management of office staff
- Preparation of annual budget document, assisted in its implementation and verified that departments were adhering to budget constraints
- Maintained general ledger in accordance with GAAP
- Management of accounts payable and payroll functions
- Responsible for cash management

1989 – 1992

**ACCOUNTANT, MURSKI, HICKS & CO., DALLAS, TX**

- Assistance with in-house and field audits
- Preparation of corporate, partnership, individual and fiduciary tax returns
- Preparation of quarterly compilations needed to meet loan covenants
- Weekly field work for clients including accounts payable, general ledger accounting and payroll activities
- Preparation of quarterly and annual payroll reports for various clients
- Miscellaneous managerial accounting duties for clients

**EDUCATION**

**MAY 1998**

**MASTER OF PUBLIC ADMINISTRATION, UNIVERSITY OF NORTH TEXAS**

**MAY 1988**

**BACHELOR OF BUSINESS ADMINISTRATION, UNIVERSITY OF TEXAS AT SAN ANTONIO**

**30 HOURS ACCOUNTING**



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## *Candidate Introduction*

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## **KAREN R. MANILA**

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### **EDUCATION**

Master of Public Administration, University of North Texas

Bachelor of Business Administration, University of Texas at San Antonio

### **EXPERIENCE**

Assistant City Manager, City of North Richland Hills, TX	2008-2024
Managing Director, City of North Richland Hills, TX	2002-2008
Budget Director, City of North Richland Hills, TX	1999-2002
Senior Financial/Budget Analyst, City of Garland TX	1996-1999
Financial/Budget Analyst, City of Garland, TX	1994-1996
Finance Director, City of Kaufman, TX	1992-1994
Accountant, Murski, Hicks & Co., Dallas, TX	1989-1992

### **BACKGROUND**

North Richland Hills, located in North Texas within the Dallas Fort Worth (DFW) Metroplex, is a suburb of Fort Worth and the 4<sup>th</sup> largest city in Tarrant County with a population of approximately 72,000 residents. The City of North Richland Hills serves its residents and business community with 590 full-time and 117 full-time equivalent (FTE) part-time/seasonal positions.

The total operating budget for the City of North Richland Hills for fiscal year (FY) 2024 is \$151,505,763. The two largest funds of the City are the General Fund at \$60 million the Utility Fund at \$42.8 million. While the departments I managed changed from time to time, the most recent departments reporting to me were Human Resources, Budget, Finance, Municipal Court and Information Technology. The total adopted budget for these departments for FY 2024 is \$25,726,037. I directly supervised 5 Department Directors, whose departments were made up of 60 employees. In the past I have managed more than 200 employees in the departments that reported to me. This figure includes part time/seasonal workers at the City's water park.

The three most pressing issues facing the City of North Richland Hills are:

- **Street maintenance/repairs** – Street repairs have topped the list of needed improvements year after year in the biannual citizen survey. While the City budgets \$1.2 million per year for preventive street maintenance, this amount does not keep up with the declining roadway conditions. City Council appointed a Capital Program Advisory Committee in 2019 to review and prioritize the city's infrastructure needs. The committee identified \$200 million in needed street repairs but recommended a bond election be held for \$49.8 million, the amount the city could afford without increasing the property tax rate. In 2020 voters approved \$49.8 in general obligation bonds. This was the first bond election since

## **KAREN R. MANILA**

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2003 that included funding for street reconstruction. It is anticipated another bond election for street reconstruction will be conducted in 2025.

- **Traffic congestion** –The city has three arterial streets that run north/south carrying large volumes of traffic from cities to the north that want to access NE Loop 820, a highway that bisects the city. Residents of North Richland Hills have repeatedly expressed frustration about the volume and flow of traffic. While the city cannot do anything to change the volume of traffic, it continuously works toward better coordination of traffic signals to improve the traffic flow. Additionally, one of the city's two commuter rail stations is located adjacent to one of the arterial streets requiring traffic to stop for an extended period when a train is at the station. The city continues to work with the transit authority toward a resolution on the traffic arm timing.
- **Population density** – The City of North Richland Hills is approximately 90% built out. While there are still a few traditional single family residential developments underway, most of the development in recent years has been higher density single family homes such as townhomes and zero lot line houses, as well as apartments. While these higher density developments have been planned for several years, residents are just now taking note of them. Residents are concerned with the additional traffic high density developments bring, the increased population's impact on the services the city provides and the impact to the school system.

### **GENERAL MANAGEMENT STYLE AND EXPERIENCE**

When I read the brochure for the Fruitland Park City Manager position it piqued my interest because I could see where my experience aligns well with what the city is seeking in its next City Manager. First and foremost, I am a seasoned professional manager with the work experience and education to lead the organization. I have worked for two outstanding City Managers in North Richland Hills that have modeled the importance of maintaining positive working relationships with elected officials and the critical nature of gaining and maintaining their trust. They also emphasized the importance of open communication with elected officials, even when communicating information those officials don't want to hear. I recognize the challenges Fruitland Park faces with the population growth and how important it is to find a balance between the small town feel of the city while also meeting the needs of the new residents. We have experienced that to a certain degree in North Richland Hills. From what I have read Fruitland Park is financially sound and my strong financial background will help keep the city sound for years to come. I have extensive experience working with outside entities through my role as liaison with the city's franchised utility providers for electricity, natural gas, and communications as well as management over the city's solid waste and recycling contract. Providing good customer service, both externally and internally, has been part of the core values I have worked under during my entire career. My extensive and varied work experience, especially with the City of North Richland Hills, has provided me the tools needed to lead Fruitland Park.

## **KAREN R. MANILA**

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During my time with North Richland Hills, I have worked beside some of the best department directors in the industry. As mentioned earlier, five department directors reported to me. Some of them were first time directors when I hired them and some I hired with many years of experience. I manage based on what each person needs from me. For the first time director, I am more structured and hands on in their day-to-day activities until they are comfortable with me backing away. With my more seasoned employees I provide them the support and tools they need to do their jobs, but I do not get overly involved in their day-to-day operations unless they need it. My employees feel comfortable coming to me to discuss issues and concerns and see me as a mentor and a coach. They know my door is always open and they are free to drop in at any time. I also drop in on them just to touch base and catch up on what's going on. I make a point of getting to know them not just as an employee, but on a personal level as well. Along those same lines, I make a point of visiting departments to chat with employees and catch up on what's going on in their lives. My staff and co-workers would describe me as fair, supportive, open and a team player.

While I've managed many excellent employees, on occasion performance issues need to be addressed. If an employee has not done anything illegal or unethical, I will work with them to help improve their performance. Most of the time counseling gets them on track but I have also had to use progressive discipline, including performance improvement plans. On several occasions progressive discipline did not work, and I had to terminate the employee. Terminating an employee is difficult, but as a manager, decisions that are in the best interest of the organization must be made.

To assist employees with staying on track and making sure they are achieving both personal and organizational goals, establishing formal sets of goals each year is part of the annual evaluation process. These goals could be of a personal nature such as gaining more knowledge about a particular topic, or they could be goals established for their department such as restructuring the department to better utilize each employee's strengths. Outside of the annual review process, goals and timelines are established throughout the year for various projects and tasks. I meet regularly with my directors to discuss their progress toward their goals.

I have worked with many city council members over the years. Most of them have recognized staff as experts in their fields and respect the work they do. The city council I most recently worked with has a lot of respect for me and see me as an ethical, strong leader who hires outstanding employees.

My greatest strength is emotional intelligence because it helps me navigate complex social situations with empathy and understanding. Emotional intelligence also helps me navigate work interactions by gaining a better understanding of people's motives and where they are coming from. It helps me foster positive relationships, improve communications, and connect on a deeper level.

While I don't necessarily consider this a weakness, something I will need to work on if appointed City Manager of Fruitland Park is delegating work instead of doing it myself. In North Richland Hills I had employees to perform tasks for me, but I still did a lot of hands-on work myself. This

## **KAREN R. MANILA**

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is not only time consuming, but it can send the wrong message to employees that you don't trust their work. It is important that I push myself out of my comfort zone and let staff do their job.

I get no greater satisfaction than seeing one of my employees grow and promote upward in their career. Thus, my greatest achievement has been developing people to help them achieve their career potential. I have hired several first-time directors, and it is satisfying seeing them go from being green in their role to having the knowledge and confidence to promote to the next level. A few years ago, I hired a budget analyst from another city that felt he was ready to make the step up to director. While he had the necessary technical skills, he was lacking in some soft skills. We discussed my concerns prior to hiring him and he convinced me to take a chance. I worked closely with him while he developed the necessary soft skills to take the next step. He is now an Assistant City Manager of a North Texas city and I take pride in knowing I helped him along his journey.

While I consider myself to have high emotional intelligence, this doesn't mean that I haven't let presumptions influence me. We hired a new Assistant Director of Finance to replace a well-loved, highly respected employee. The relationship between the new Assistant Director and staff was not good. My assumption was that staff was not being accepting of her and they were the reason things were not going well. I met with Finance staff so we could talk through the issues, emphasizing to them it was critical that they do everything they could to make it work. With time it became clear that the new Assistant Director was the issue, not staff. This situation taught me how important it is to keep an open mind and hear what is being said, not just listen.

The challenges I see for the person taking the job of city manager for Fruitland Park will be:

- Integrating into the organization. It's not just about getting to know the commission, organization, and staff, it's becoming an integral part of the team.
- It will also be imperative for the person taking the job to become a valued and respected member of the community. They will need to get involved in community organizations and get to know community members.
- As far as the challenge for the city itself, I see the greatest challenge to be planning for the population growth that is headed to Fruitland Park. This challenge includes not just infrastructure needs, but how to balance the new with the old.

During the first six months my efforts will involve:

- Get to know the commissioners, discussing with them what their vision is for the community, and what their goals and priorities are for the city.
- Getting to know the staff, boards, committees, and community and evaluating alignment with the commission's vision, goals, and priorities.
- Becoming familiar with the city's finances.
- Discussing with staff what they see as challenges and opportunities.
- Review of current operations to determine if there are any modifications needed.
- Becoming familiar with the city's code of ordinances, city charter and State laws.

## **KAREN R. MANILA**

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- Reviewing and becoming familiar with all planning documents, such as the comprehensive plan, strategic plan, etc.

In my most recent city, media contact is initiated with the city's Public Information Officer (PIO). She coordinates all responses to the media. I realize that as the City Manager of Fruitland Park there will be more personal contact with the media. I am comfortable speaking with the media as I have done this in the past prior to the PIO taking such an active role in media relations. I have had no negative contact with the media and there is no information or "dirt" out there that would embarrass the city of Fruitland Park.

While some people still get their information through printed newsletters or newspapers, more and more people are relying on social media to keep up with what is going on within their community. Posting timely and accurate information on social media platforms such as Facebook, X, Instagram and Nextdoor can go a long way toward informing residents of what is going on within the city. Information shared goes beyond what would have traditionally been issued via a press release. It includes upcoming meetings, recreation events, kudos for employees and community members, the status of projects, etc. In North Richland Hills, social media is being used heavily to keep residents up to date on the bond street reconstruction projects such as what stage the project is in, progress of construction, upcoming closures and any other information that will help the community be informed.

My husband and I have many hobbies with sailing topping the list. About 1 year ago we purchased a sailboat in Jacksonville, FL. We visit the boat as often as we can and are excited about living in Florida closer to the boat so we can spend more time sailing. When we aren't on the sailboat, we enjoy bicycling on local trails and occasionally riding in organized bicycle rallies. Another activity we enjoy and hope to do more often once we move to Florida is SCUBA. Both my husband and I are SCUBA instructors, although we are not currently teaching. We also love to travel.

### **SIX ADJECTIVES OR PHRASES YOU WOULD USE TO DESCRIBE YOURSELF**

- Ethical
- Knowledgeable
- Intelligent
- Dependable
- Kind
- Friendly

### **REASON FOR DEPARTING CURRENT POSITION**

Having recently retired with full benefits from Texas Municipal Retirement System, I am taking advantage of the opportunity to seek out a city manager position where I can experience new

## **KAREN R. MANILA**

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challenges and at the same time contribute what I have learned over almost 32 years of working in local government.

### **CURRENT / MOST RECENT SALARY**

My final compensation in North Richland Hills was \$227,700 per year including car allowance, phone allowance and deferred compensation.





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## *CB&A Background Checks*

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**Background Check Summary for  
KAREN RENE MANILA**

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**Criminal Records Checks:**

Nationwide Criminal Records Search	No Records Found
County	
Tarrant County, TX	No Records Found
State	
Texas	No Records Found

**Civil Records Checks:**

County	
Tarrant County, TX	No Records Found
Federal	
Texas	No Records Found

**Motor Vehicle**

Texas	No Records Found
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<b>Credit</b>	Excellent
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<b>Personal Bankruptcy</b>	No Records Found
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<b>Sex Offender Registry</b>	Not Listed
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<b>Education</b>	Confirmed
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<b>Employment</b>	Confirmed
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<b>Social Media</b>	Nothing of Concern Found
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**Background Check Summary for  
KAREN RENE MANILA**

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Under the Fair Credit Reporting Act, 15 U.S.C. 1681-1681Y, credit and bankruptcy information are very sensitive and should not be used in the consideration of hiring. The information is included for each candidate because we do not want you to be surprised if third parties raise what they consider to be a concern. Also, some states have limited the reporting to seven years, so any records older than that will not be available in those states. In addition, motor vehicle reports are limited to three to seven years, depending on the state.

**Background Check Summary for  
KAREN RENE MANILA  
Personal Disclosure**

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**Personal Disclosure Questionnaire**

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Name of Applicant: Karen R. Manila

The following questions are designed so that we will be able to make full disclosure to our client concerning your background. Please answer them honestly. Cutting corners or misrepresenting your past will result in you being eliminated from all further searches conducted by this firm. We understand that frivolous charges are sometimes made and that charges do not mean you were guilty. We also understand that you may have been wronged and needed to seek compensation. The bottom line is that we want to be certain that our client is fully informed. If you have any questions, please contact us for clarification.

Please explain any yes answers on a separate sheet of paper.

1. Have you ever been charged or convicted of a felony?  
Yes ☐ No ☒
2. Have you ever been accused of or have been involved in a domestic violence or abuse incident?  
Yes ☐ No ☒
3. Have you ever declared bankruptcy or been an owner in a business that did so?  
Yes ☐ No ☒
4. Have you ever been the subject of a civil rights violation complaint that was investigated or resulted in a lawsuit?  
Yes ☐ No ☒
5. Have you ever been the subject of a sexual harassment complaint that was investigated or resulted in a lawsuit?  
Yes ☐ No ☒
6. Have you ever been charged with driving while intoxicated?  
Yes ☐ No ☒
7. Have you ever sued a current or former employer?  
Yes ☐ No ☒
8. Please list links to all your social media accounts (Facebook / Instagram / LinkedIn / Twitter, etc.) and your personal web page if you have one. Facebook: Karen Waddle Manila, Instagram: karenmanila, LinkedIn: Karen Manila
9. Is there anything else in your background that, if made public, would cause you, our client or our firm embarrassment if it came to light through the press or any other mechanism?  
Yes ☐ No ☒
10. Please provide a list of any lawsuits in which you are or have been a party either as plaintiff or defendant. N/A

Attested to:

  
Signature of Applicant

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## *CB&A Reference Notes*

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## Reference Notes

### Karen Manila

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#### **Scott Turnage – Former City Council Member, North Richland Hills, TX (817) 992-6899**

Mr. Turnage has known Ms. Manila since the early 2000s, when he was elected to the City Council in North Richland Hills. He understood her decision to retire, but was incredibly sad to see her leave her position as the Assistant City Manager. They worked closely together for their 20+ years, and he trusts her explicitly. He has seen her take on a variety of tasks over the years, and he appointed her to be the liaison with him for a bond study committee. Immediately upon announcing her decision to retire, she trained her successor. She can identify the strengths of others and mentor them to reach their highest potential.

Before Ms. Manila became an Assistant City Manager, she was the Budget Director. Finance is her biggest strength, and she knows budgeting better than anyone. During their annual budget retreat, she had the answers on hand anytime they were needed. She is knowledgeable in state regulations, applying for grants and funding, and presenting budgets to the Council. In addition to budgeting, she is a highly skilled leader. The individuals that work under her clearly respect and admire as a manager, mentor, and supervisor. During her years with North Richland Hills, she oversaw many departments and city contracts. She oversaw the garbage renewal contract every 3 to 5 years, and worked with the electricity providers to manage prices and franchise agreements. She has experience helping with the expansion of roads and how it affected utilities in the area. She coordinated the departments within and outside of the city government to make the expansion successful. She has worked with their fire department, police department, and was instrumental in structuring their compensation program.

Ms. Manila worked under two City Managers while at North Richland Hills. The second, Mark Hindman, was wonderful as a City Manager, and he speaks highly of her as well. The first, Larry Cunningham, was an incredibly difficult person to work with. Her ability to thrive is a testament of her ability to work with challenging personalities. He was temperamental, and volatile, yet she handled that work environment and did her job amazingly under trying circumstances. Ms. Manila is frank, and to the point. She has a no-nonsense personality, and can handle difficult situations. There was a time that she had an employee, the manager of their fleet services department, who was creating discontent in the department, and there was a sexual harassment claim against him. Ms. Manila dealt with the situation. She put him on probation, and he had to undergo a counseling program to keep his job. She did not back down or ignore this issue.

Although she has a strong personality, Mr. Turnage has had nothing but wonderful interactions with Ms. Manila. She was professional, and always respectful. He also knows her on a personal basis through bike riding and scuba diving. Aside from those things, they both attended the National League of Cities Convention in Washington DC every year, and she was the coordinator for those trips. She has fantastic people skills, and was gracious in showing others around the area on these trips. Aside from ensuring everyone enjoyed their time in DC, she also briefed them on who they would be meeting with, and what to expect at the convention itself. At work she is focused, and in social settings she is easy to be around and a pleasant person. She is detail-oriented in all facets of her life.



## Reference Notes

### Karen Manila

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Ms. Manila is a good decision maker, and she maintains a high-performance level. She has been part of multiple major changes. The city grew from an estimated 40,000 residents to an estimated 72,000 residents during her tenure. It has been necessary to adapt in her years working for North Richland Hills. She could think outside of the box, and helped change their procedures through the COVID-19 pandemic. She never balked at change, but took it in stride. She enjoyed being out in the community with the people she served. She is a scuba instructor, which also demonstrated her ability to handle people during stressful situations.

Ms. Manila is a highly skilled leader. The individuals who work under her clearly respect and admire as a manager, mentor, and supervisor. Her leadership style has changed over the years. Early on, she was a behind the scenes manager but has grown and evolved over the years. She can rally employees because they want to follow her lead. Mr. Turnage can easily see her in a City Manager position, she would be incredibly successful. Aside from her employees and the residents, the City Council members were her customers in a way, and he has oftentimes marveled at how much patience she has. When it comes to the public, they only spoke to her if there was an issue which she handled with grace and understanding.

Mr. Turnage has never heard anything controversial when it comes to Ms. Manila, and he would be shocked if anyone else has. He would hire her instantly to be a City Manager. If he were starting a company today, she would be one of the people he wanted on his team. He trusts her, she has an impeccable work ethic, and her judgment, values, honesty, and integrity make her invaluable to any team.

#### **Words or phrases used to describe Karen Manila:**

- Resourceful,
- Good judgment,
- Likable,
- Tenacious,
- Tough skinned,
- Detail oriented, and
- Hardworking.

**Strengths:** Budgeting, leadership.

**Weaknesses:** Frank and to the point.

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#### **Mark Hindman – Former City Manager, North Richland Hills, TX (817) 301-8100**

Mr. Hindman met Ms. Manila in 1999, when he served on the interview panel for the Budget Director of North Richland Hills. He worked in another city, but was serving on the panel, and Ms. Manila was the unanimous choice for the position. He joined the city of North Richland Hills in 2009 as the City Manager, where they worked together until he retired in March of 2024. She is an excellent city employee and she understands budgeting, finance, and operations. She was the

## Reference Notes

### Karen Manila

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Swiss army knife for their City. During vacancies in administration or management, she led the group while the search for a new employee was underway. Mr. Hindman relied on her heavily from a financial standpoint, she can sort through finances to find funding available, if there is any.

Ms. Manila is extremely skilled in financial matters, and she understands city operations well. Along with those skills, she works well with others, and is polite and likable. Mr. Hindman and Ms. Manila worked in the same office, so most of the time their interactions took place in person. However, Ms. Manila established email chains to track information as needed. She was part of the hiring process in both of her positions as the Budget Director and Assistant City Manager, and she hired well. Unfortunately, not every hire is going to be perfect, and there were times she had to train employees to be their best. When employees were not working out, she worked with them first to see if more training was needed, and to give them every chance to succeed. If an employee did not improve, she proceeded as necessary.

Ms. Manila looks at facts and numbers before making decisions, she is objective. She looks at facts first and then moves onto non-quantitative factors in making decisions. She maintains and improves the organization she is a part of. She does not make changes for the sake of change, she strives for improvement, not just change.

Ms. Manila is out in the community a fair amount, not as much as he had to be simple because he was the City Manager while she was the Assistant City Manager. She is more than happy to go to events that the City Manager is unable to attend, to ensure the community knows the city supports them, and that she is there for the citizens. She has overseen many operations for the city, one example being the water billing. Due to her overseeing the water billing, she had many opportunities to interact with the public both one on one as well as in groups. A project she worked on was implementing electronic meters, and she gave presentations to both the City Council and employee groups for this project.

Ms. Manila was skilled in staying on top of what was happening inside and outside of the organization that may affect them. She had good judgment and knew when to share information. She was his Assistant City Manager the entire time he was there, and Mr. Hindman could not have asked for anyone better. If there was an issue or when something was not working well, she worked over the details and came up with creative solutions. Another project she worked on was implementing a new ERP system, which was a three-and-a-half-year endeavor. Unfortunately, their wastewater rate structure did not fit into the module. She found the solution to make it work.

Ms. Manila is customer oriented and tries to work through customer issues while giving them the benefit of the doubt. She is empathetic with customers as well, and is motivated to find solutions. There were multiple times where she paid the water bill for someone if she was unable to work with them for a different solution. She assessed the situation and when someone could not make the cost work, she did everything to help them. She also understood they had a responsibility to the rest of the citizens, they could not subsidize customers indefinitely, but she took stock of each individual situation and came up with the best solution for the customer and the city.

There has never been an issue with Ms. Manila finishing tasks on time. If she noticed there could

## Reference Notes

### Karen Manila

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be an issue with the time constraints, she brought it up with him and they responded accordingly. She is ahead of schedule most of the time. Mr. Hindman knows of nothing controversial in her past professionally or personally, she knows to avoid anything that could put her in a bad situation. He begged her to stay with North Richland Hills until he retired, and she did, for which he is grateful. She has the knowledge and experience necessary to be a wonderful City Manager, she is someone you can rely on.

#### **Words or phrases used to describe Karen Manila:**

- Competent,
- Intelligent,
- Likable,
- Committed,
- Reliable, and
- Trustworthy.

**Strengths:** Finance, operations, people skills.

**Weaknesses:** She did not have direct experience in city planning operations. She was involved in the background, but did not work directly in this field.

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#### **Patrick Hills – Human Resources Director, North Richland Hills, TX (817) 427-6106**

Mr. Hills has known Ms. Manila since 2000, when he was hired by the city of North Richland Hills. Ms. Manila was the Budget Director at the time. When she was promoted to be the Assistant City Manager in 2008, he began reporting to her as she was over the internal services department. She was a fantastic supervisor and Assistant City Manager. She worked under two City Managers, and both relied heavily on her, because she has a tremendous amount of credibility with both the City Manager and the Council. She was important to the overall executive city management team.

Ms. Manila has amazing people skills. She knows how to understand and balance her audience. She is incredibly skilled with numbers, and the budget and finance of the city, she was the go-to person for anything financial within the city. Along with being the budget specialist, she presented financial information to both the City Council and residents. She was simply a nice person. In his position as the Human Resources Director, Mr. Hills had to deal with unpleasant situations regarding employees and she was helpful during those times. She cared for her staff and the overall treatment of employees was important to her.

Interactions with Ms. Manila have been nothing but pleasant. On the personal side, she is caring. In a city with 550 full time employees, sometimes closer to 1,000 during surges, she made it feel like a small city, and paid attention to the culture of the workplace. On a professional level, communication was excellent with Ms. Manila. She was not a supervisor who told her employees exactly what to do, she gave them direction and advice to make decisions on their own and move forward. She held employees accountable, while allowing them the ability to do their job their way.

## Reference Notes

### Karen Manila

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if it has the desired result. They had to evolve and change in North Richland Hills to have stayed as long as they have, and she took change in stride while maintaining the performance level they are accustomed to.

Mr. Hills usually communicated with Ms. Manila over phone calls and in person. He prefers face to face over email and she knew this, so they often communicated to his preference. She has rallied the Internal Services department around the vision of the organization multiple times. Internal Services consisted of IT, the municipal court, finance, and human resources. She is a good leader, and steers her employees toward a common goal. He often sought her counsel when issues came up. For example, an important employee to the department was away for some time on medical leave, and they needed to find a way to make up for the loss. She suggested using volunteers from another department to fill in the gap.

Ms. Manila has never been late with a project they worked on together, and she handles stress well. She could not have lasted as long as she did in her position without being able to handle stress. She has never been involved in anything controversial or embarrassing, and he was upset to see her retire. She is one of the best supervisors he has been able to work for, and would be an incredible City Manager.

#### **Words or phrases used to describe Karen Manila:**

- Well liked,
- Good mentor,
- Financially competent,
- Creative,
- Collaborative, and
- Problem solver.

**Strengths:** People skills, finance, budgeting, presentations, leadership.

**Weaknesses:** None Identified.

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#### **Oscar Trevino – Former Mayor, North Richland Hills, TX (817) 312-9626**

Mr. Trevino met Ms. Manila in 1999 when he was part of the City Council, and she became the Budget Director. He became the Mayor in 2002 and she became the Assistant City Manager in 2008. She is strictly business. She does a wonderful job and understands fiscal responsibility better than anyone. She takes her job incredibly seriously and there was never doubt during budget and finance meetings that she gave the correct information. She handles people extremely well, both her employees and the public.

During her time with North Richland Hills, Ms. Manila oversaw the garbage pickup, which can be a touchy subject for citizens, but she handled all situations very well. She also oversaw the water department, and dealt with the public when they felt they were not treated properly. She considered

## Reference Notes

### Karen Manila

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their circumstances for payments and remedied situations as they arose. She had incredible financial skills, and her memory was amazing. She can recall where to find information in a large budget book, both quickly and accurately. She researched and made sound fact-based decisions.

Ms. Manila is blunt, but professional, she will tell you exactly as things are. She is not rude or crass, but she let Mr. Trevino know when he was heading in the wrong direction. They had a wonderful working relationship based on trust. If the City Manager was away for any reason, Ms. Manila was the one in charge. She is more on the side of maintaining high efficiency than creating change, but she will change when needed to make improvements. When changes were made during her time with the city, the City Manager received the credit for those changes.

Ms. Manila is a known face in the community. She is an avid bike rider, and participated in the Mayor's monthly bike ride. She also participates in the Lions Club and Chamber of Commerce lunches, as well as multitudes of other local government meetings and events. In her position over both water utilities and garbage, she dealt with many citizens one on one and in larger groups. She stays on top of information, and takes care of everything. She is an extrovert, and she leads from the front, rallying the troops. She had little employee turnover and employees were loyal to her.

Ms. Manila is a problem solver, and often solves problems before you notice there was one to begin with. Electric regulations were changing, and prices skyrocketing when she decided to lead the city in joining with other cities to create a coalition to successfully negotiate with the power company to keep their prices from rising. She understands that taxpayer dollars are something to be careful with, and she deals with unhappy taxpayers when they bring her issues.

Initially being in finance and budget, Ms. Manila is deadline driven. She had all the necessary information prior to meetings and from a Council perspective, she had answers quickly. She responds well to stress. For example, a citizen called out in a meeting, questioning where she had gotten some of her information. She took their questions in stride, looked through her info again, and stood by it while responding politely but firmly about her information sources.

You will not find anyone more personable and easier to talk to, Ms. Manila does not talk down to anyone, and would never jeopardize her position and trust from her citizens and coworkers. Mr. Trevino would happily hire her. She would make an excellent City Manager.

#### **Words or phrases used to describe Karen Manila:**

- Professional,
- Intelligent,
- Easy to talk to,
- Positive,
- Trustworthy, and
- Honest.



## Reference Notes

### Karen Manila

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**Strengths:** Finance, memory, research, decision making.

**Weaknesses:** She is not always patient with employees. She is not tolerant of things not being done correctly, and she does not coddle people. This trait is a strength as well, she does not take kindly to anyone who cheats or lies. She is in a position of public trust, and she is not going to squander that trust.

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#### **Eric Von Schimmelmnn – Information Technology Director, North Richland Hills, TX (817) 427-6239**

Mr. Von Schimmelmnn has known Ms. Manila since 2021, when he became the IT Director and began reporting directly to her. She was a great supervisor, he has been working in government for 35 years, and she was amazing to work for. She is very positive, gives great feedback, and direction. She is easily one of his best supervisors in all his years of government work.

Ms. Manila's biggest strengths are her ability to listen, her understanding of high-level tasks, and her ability to disseminate information and direction. She is extremely knowledgeable in finance. The budgeting process has been eye opening to him under her supervision. He moved from a different state, and she helped show him the rules and regulations in Texas local government.

When Mr. Von Schimmelmnn came onboard, he was initially given leadership of the department to see what he could do on his own. Ms. Manila wanted to see his management style, and then provided more clear direction. She knew his background enough to trust him to get to know the employees first and then create their direction.

Ms. Manila communicates thoroughly, and they have stayed in communication since her retirement, she continues to be a mentor. She is articulate, and reads people well. She is a good judge of character, and employees follow her lead. In his work with her, Ms. Manila has been a change agent, due to technology changing constantly. When he came onboard, she had been heading the department and was in the process of implementing new technology.

Ms. Manila is well known in the public. He has seen her at retirement parties other than her own. She is skilled in talking with her superiors, subordinates, peers, and the public. She has an open mode of communication and makes the time for people when needed. She is a leader from the front, she is open to being there for her employees and gets things done properly.

Ms. Manila recognized that the ERP system that the city had needed change. She went through the long, rigorous process and led the team before he was brought in to replace the entire system. This was a tremendous undertaking that she began while also maintaining her other responsibilities. Another problem she solved was the need for a new waste management vendor. She found the new vendor and explained the reason for the change to the city and the public. Currently the city is also implementing a new utility billing system that is customer facing, and her purpose in this was making utilities easier for the residents, she cares for their wellbeing and ease.

## Reference Notes

### Karen Manila

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Mr. Von Schimmelmänn is not aware of anything embarrassing or controversial about Ms. Manila. The only reason she is no longer working at the city of North Richland Hills is because she retired. He would absolutely hire her. After seeing how she interacts with both internal and external organizations, he highly recommends her to be a City Manager.

#### **Words or phrases used to describe Karen Manila:**

- Leader,
- Innovative,
- Caring,
- Facilitator,
- Dedicated, and
- Honest.

**Strengths:** Listening, disseminating information, finance, rules and regulations.

**Weaknesses:** He would have liked more clear direction when he was first hired.

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#### **Maleshia McGinnis – Former City Attorney, North Richland Hills, TX (972) 237-2005**

Ms. McGinnis met Ms. Manila in 2016, when the former started working as the City Attorney in North Richland Hills and the latter was the Assistant City Manager. Ms. Manila was wonderful, she managed a great deal of high volume, high work level departments under her, many employees, and any issues arose during that time. She oversaw multiple public facing departments, so she dealt with citizens often. She is skilled in the management aspect of her role, and understands what is important to citizens, boards, and the City Council.

Ms. Manila's biggest strengths are understanding the bigger picture, and how to handle citizens. Usually, by the time a citizen reaches her with a complaint, they are very unhappy. She is skilled in deescalating the issues they bring in, and in helping them understand city processes and restrictions. She also works very well with City Councilmembers and relates well with everyone. They had daily interactions, as their offices were in the same building, which were always pleasant, respectful, and professional. They cultivate a family atmosphere in North Richland Hills, where they got work done but it was also pleasant to be there. Ms. Manila had a hand in hiring personnel such as the budget director after her, the finance director, and the IT director. She made good hiring decisions, and she helped to cultivate the pleasant work environment they enjoyed.

Ms. Manila makes solid decisions, after gathering details and looking at the big picture and the impact of each decision made. She maintains a high-performance level, and takes on the responsibilities of the City Manager as needed. She has attended events such as the Chamber of Commerce luncheon, and has presented to the City Council. She was also the representative for the Utilities Coalition, in which a few cities pulled together to negotiate rates for utilities in the area. She is well known to the public. She is appropriately visible in the community, given her position with the city. She can be the leader, or she can be behind the scenes.



## Reference Notes

### Karen Manila

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Ms. Manila handles stress well, they encountered many stressful situations and she continued to get the job done. She does not dwell on the stress, but rather continues with what is needed. Ms. McGinnis is not aware of anything that could be seen as controversial about Ms. Manila. Ms. McGinnis would absolutely hire Ms. Manila to be a City Manager because she has a pulse on all three levels of service necessary to be a City Manager which are: citizens, council, and staff.

#### **Words or phrases used to describe Karen Manila:**

- Happy,
- High spirited,
- Cooperative,
- Knowledgeable,
- Customer service oriented, and
- Detailed.

**Strengths:** Understanding the big picture, dealing with citizens, relatability.

**Weaknesses:** She can be inflexible with funding.

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**Prepared by:** Rebecca Whitman  
Colin Baenziger & Associates

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*CB&A Internet Research*

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Internet – Newspaper Archives Searches  
Karen R. Manila  
(Articles are in reverse chronological order)

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<https://x.com/CityofNRH/status/1772259816796311883>  
March 25, 2024



**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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<https://www.nrhtx.com/Calendar.aspx?EID=6199>  
March 22, 2024

**Retirement Reception**

**Friday, March 22, 2024**

Join us in honoring retiring Assistant City Manager Karen Manila.

A retirement reception to honor Assistant City Manager Karen Manila will take place from 3 to 5 p.m. at NRH City Hall. Presentation will begin at 3:30 p.m. The community is welcome to join us as we show our appreciation for Mrs. Manila's nearly 25 years of service to the City of North Richland Hills and wish her well in her retirement.

Cards and emails are also welcome and can be sent to P.O. Box 820609, North Richland Hills, Tx 76182 0609 or [communications@nrhtx.com](mailto:communications@nrhtx.com).

Read more about Mrs. Manila's service to our community on Page 3 of our [Winter NRH Newsletter](#).

**Date:** March 22, 2024  
**Time:** 3:00 PM - 5:00 PM  
**Address:** 4301 City Point Drive  
City Council Chamber  
North Richland Hills, TX 76180  
**Contact:** 817 427-6126  
**Email:** [Communications Dept.](#)



**Winter NRH Newsletter:**

Assistant City Manager **Karen Manila** is retiring effective March 22, 2024 after a 32-year career in municipal finance and administration. Hired in 1999 as the Budget Director and promoted to Assistant City Manager in 2008, **Mrs. Manila** has provided leadership and guidance for many of the city's operations including budget, accounting, purchasing, utility billing, information technology, human resources, municipal court, legislative analysis, franchise utilities and the city's solid waste contract. She has been instrumental in keeping the City in exceptional financial condition and ensuring all city departments are being good stewards of the public's dollars.

"I have been blessed to serve in three Texas cities, but the highlight of my career has been serving the residents of North Richland Hills," she said. She added that NRH city staff have been a pleasure to work with. "It would be difficult to find a more dedicated and talented group who put their heart into their jobs every day serving the residents of our great city."

She also expressed appreciation to the City Council members she has worked with over the past 24 years. "Their support, respect and concern for city employees is unmatched, as is their dedication and love for the city," she said. "Their steady leadership and vision are what has made North Richland Hills such an outstanding city, one that I am proud to call home."

Trudy Lewis is being promoted to replace **Mrs. Manila** as Assistant City Manager over fiscal and administrative services. Mrs. Lewis has served as the city's Budget Director since December 2021. Before joining North Richland Hills, she served as City Administrator for the City of Hutchins and City Manager for the City of Glenn Heights. Her previous experience also included positions with the cities of Arlington and Irving.

<https://www.businesswire.com/news/home/20191217005051/en/Tyler-Technologies-to-Provide-Integrated-Enterprise-Resource-Planning-System-to-City-of-North-Richland-Hills-Texas>  
December 17, 2019

**Tyler Technologies to Provide Integrated Enterprise Resource Planning System to City of North Richland Hills, Texas**  
**Solutions to manage everything from community development to finance operations**

Tyler Technologies, Inc. (NYSE: TYL) today announced it has signed an agreement with the city of North Richland Hills, Texas, for a variety of Tyler solutions including EnerGov™ and Munis® as core ERP solutions, as well as Socrata Citizen Connect™, Socrata Open Finance™, Digital Health Department™ (DHD), MobileEyes®, and Tyler EAM™. The city's 20-year legacy solutions are disparate and haven't allowed for a seamless flow of data or processes from one function to the next, creating inefficiencies and reducing the value of the information stored by making it less accessible. The city selected Tyler for its fully integrated ERP solution, which will better meet the needs of the city for many years to come.

"There are many things about Tyler's solutions that are appealing to us, such as advanced reporting and the ability to find everything you might need with just a few clicks," said **Karen Manila**, assistant city manager for North Richland Hills. "This modern system will align us better with our business practices and allow us to provide better customer service for the public as well as for internal customers."

Tyler's Munis and EnerGov solutions combine fully integrated finance, payroll and HR, utility billing, asset maintenance and community development systems. Tyler's solutions will allow the city to

Operate within a modern digital government architecture where information can be easily shared across applications and functions

Access improved data analysis and reporting through intuitive, customizable reporting tools and modern analytical toolsets

Move to a system with tight integration between field electronic data collection and the backend database, so users can get instant alerts and complete workflow tasks on their smartphones in the field

Provide self-service capabilities to their employees, residents, and vendors

"We're pleased to deliver a fully integrated ERP solution to the city of North Richland Hills," said Chris Hepburn, president of Tyler's Enterprise Group. "Our solutions are designed to empower city personnel, ease the transition to improved business processes, and promote the city's self-sufficiency for long-term support of the system." The city of North Richland Hills is in the Dallas-Fort Worth Metroplex and has a population of more than 70,000.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
May 24, 2014

**Preliminary property values rise in most of Tarrant**

Author/Byline: Bill Hanna and Caty Hirst; Staff writer Susan Schrock contributed to this report

The bad old days of the recession appear to be in the rearview mirror. The recovery is in full force across Tarrant County, according to preliminary values from the Tarrant Appraisal District. Almost every segment of the real estate market is seeing increases, and just about every part of Tarrant County is showing an uptick in values. Only a few cities had no significant gains. Overall, assessed property values are up 6.7 percent across Tarrant County. But the Tarrant Appraisal District and many area cities caution that these values will likely drop as some homeowners and commercial property owners protest their valuations.

Chief appraiser Jeff Law expects about 70,000 of the 1.4 million tax accounts in Tarrant County to challenge their appraisal. Property owners have until June 2 to file a formal protest, which they can do online at [www.tad.org](http://www.tad.org). He has advised cities and school districts to assume about a 2 percent drop from the current valuations, though he doesn't expect that significant a drop. "I can't really tell you how much to expect things to change but I would say this year, things are better than healthy," Law said.

Home prices are also helping drive the increases. Residential values are up 8 percent across the county. There has been some new construction with the addition of 5,534 residential and 201 commercial accounts. The gains reflect the pull of the local economy bringing more people to the area, Tarrant County Administrator G.K. Maenius said. "Quite frankly, it's an up market and this is reflective of that," Maenius said.

But real estate agent Lucy Puniwai, who works in the Alliance corridor, said many clients have been upset with TAD as their appraisals have jumped by \$25,000 to \$30,000. She said values are up and multiple bidders are often vying for homes but she believes that TAD is overreaching with its appraisals. "The people that have contacted me to protest taxes have recently purchased homes," Puniwai said. "Their appraisals just jumped through the roof. I don't believe the appraisal system is fair. There's just no consistency or balance in the system."

This year, TAD increased the value on about 260,000 existing accounts. Of those, 166,000 had a jump from 5 to 10 percent; 63,000 increased by less than 5 percent; and about 31,000 went up by more than 10 percent. Among commercial properties, apartments increased 25 percent, office space jumped 20 percent, retail climbed 15 percent and warehouses had a 10 percent increase. "For Tarrant County, it's pretty much been countywide," said Bill Makens, chairman of the Fort Worth Society of Commercial Realtors and an associate with the Makens Co. "You just have a lot of retailers that have become active again and DFW is an attractive market to a lot of retailers," Makens said.

Among apartment complexes, the higher-end properties — those that are considered Class A and Class B — have had the biggest increases. "For investors, it has become a lucrative investment,"

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Law said. “A lot of apartment complexes are selling; values are going up. We’re seeing a lot of increases across the whole county, particularly in Class A properties.” There was also a big increase in mineral interest accounts, from 404,000 to 719,000. The overall value increased by \$500 million from \$2.4 billion to \$2.9 billion.

Fort Worth expects another budget shortfall

The preliminary TAD appraisals are important to local governments because they use these numbers to start building budgets for the next fiscal year. City officials say that the numbers are encouraging and optimistic, but that they are being cautious. Fort Worth, for example, had a 7.4 percent increase in net taxable property value, which is at \$43.4 billion in the preliminary report.

Still, the city’s chief financial officer, Aaron Bovos, said Fort Worth is projecting only a 2.9 increase in revenue from property taxes and a 5 percent in the sales taxes for fiscal 2015. He expects the city to have another shortfall in the upcoming budget. “From a historical perspective, where we sit today is much better than where we have sat in prior years. There really isn’t even a comparison,” Bovos said, but he added that they are “still talking about budget reductions.” He asked each department to come up with a 2.8 percent reduction in their budgets. Based on fiscal year 2014, that is \$16.4 million in reductions for the general fund. In a “balancing act,” he also asked departments what they would do with more money.

Last year, the city initially faced a \$50 million shortfall, which was bridged with sustainable cuts, including jobs, increased property and sales tax revenue, and use of one-time budget savings. “I feel very optimistic about the revenue forecast. Does that mean we are throwing caution to the wind? No, it will never mean that for a financial planner,” Bovos said. The city also dangled the potential for 3-5 percent raises for general employees in 2015 if it found \$5 million in savings through the year to fund it. General employees have received one raise in the last five years, in fiscal 2012. Bovos could not say whether the raises will be included. “The 2015 budget is still under development and raises are under consideration,” Bovos said. “They are part of the goal and part of the financial plan, but we are still working on having all those pieces to be able to solidify what that looks like.” “When we make a decision for 2015, we need to make sure that decision is sustainable for a five-year forecast,” he said. Bovos said the city’s approach toward the fiscal 2015 budget is “a little more comprehensive than what I know Fort Worth to have done in the past,” with careful attention paid to five-year projections. He said the recommended budget will be presented to the City Council on Aug. 12.

Arlington numbers ‘encouraging’

Arlington’s taxable values, currently \$19.2 billion, rose about 3.3 percent over last May, which is what officials had projected. The city had “encouraging” growth in residential, commercial and mineral values across the board, Budget Director Mike Finley said. “Our tax base is on track with what we expected,” Finley said.

The Viridian Management District, site of the 2,300-acre master-planned Viridian development in Arlington, had an 84.5 percent gain from a year ago. While property values are soaring in that neighborhood, it is also simply a sign of new construction. The number of accounts in Viridian grew from 539 to 817. “You’re taking a small area where a lot of homes have been built,” Law



**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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said. “A lot of that was vacant land and now it’s homes and other new stuff. They’re adding things out there all of the time.” For some smaller communities, the impact of new businesses can be significant.

Haslet, with its nearness to the sprawling Alliance development in far north Fort Worth, has seen its property values jump a whopping 35.6 percent, most of which came from the arrival of the Amazon fulfillment center. “Amazon — that pretty much says it all,” said Debbie Maness, Haslet’s finance director. “To see an increase is really good but I will say I’m pretty conservative and we won’t really know its impact until we get the final number in July.” The arrival of Amazon is another sign of growth in far northern Tarrant County. Last year, Alliance developer Hillwood reported to the city of Fort Worth that the development had a \$50 billion impact on the North Texas economy since it began in 1989.

In North Richland Hills, there are also signs of recovery.

The city issued construction permits for 189 single-family homes last year and had new commercial redevelopment along Northeast Loop 820 with the new Floor & Decor, Taco Cabana and Quick Trip. Sandlin Homes is also planning a 192-lot subdivision off Iron Horse Boulevard, Assistant City Manager **Karen Bostic** said. “It’s a positive and welcome sign for our local economy and we are hopeful that we are finally returning to a pattern of slow and steady positive growth,” **Bostic** said.

Red-hot housing market

In some parts of Tarrant County, the stories of buyers lining up to buy homes are true. Fort Worth real estate agent Scott Bailey was showing a home on Hillcrest Street in Fort Worth that was not entered in the Multiple Listing Service. “I’ve got one that everybody just walked through,” said Bailey, who had more showings scheduled that day. “I think inside the loop [locations within Loop 820] it is fantastic right now from an agent’s point of view,” Bailey said. “If you go outside the loop, there are cash buyers buying and paying cash and then turning around and leasing them out. There are good deals for investors in those areas that are saturated.”

Last month, a real estate investment trust with an Arlington address bought one of his listings along Meadowlark Drive in far south Fort Worth, shortly after buying another home in the same block. By the time the buyer closed on Bailey’s listing, a “for lease” sign was already up in front of the neighboring house. A few areas have seen more modest gains, including Edgecliff Village, the Everman school district and Dalworthington Gardens. “Some of these smaller towns don’t have the land mass to bring in new industry or have the available land for new housing,” Maenius said.

Protest deadline approaches

Time is running out to file a protest. Tarrant County property owners have until June 2. “If you’re thinking about protesting, I would go ahead and file a protest,” Law said. “That way you are protecting your right to protest. You can always drop the protest later if you choose to do so.” Once a protest is filed, residents can also call the appraisal district and talk to an appraiser about dropping their valuation, but Law warns that values are going up in most areas. “Right now, the data supports that values are up,” Law said. “We may not necessarily lower a value but it doesn’t

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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hurt to talk to an appraiser.” Some taxpayers have complained that appearing before the appraisal review board can be daunting.

Law said property owners need to do their homework before coming before the review board. “It shouldn’t be an intimidating process, but they do need to come prepared,” Law said. “If they think their value is too high, they may need to talk to a real estate agent. Look at listing prices and advertisements. Also, bring in photographs. There may be something we don’t know about your property. We may not know it only has one bathroom instead of two. That’s the kind of thing that can lower your value.” But homeowners need to accept that values are currently on the increase. “Right now, I think there’s a huge demand for residential properties and the supply is simply not there.”

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
May 24, 2012

**DFW cities optimistic about growth in property values - Taxable values rise 2.5% for Tarrant; big cities see increases of at least 3%**

Author/Byline: Bill Hanna and Darren Barbee; Staff writers Eva-Maria Ayala and Susan Schrock contributed to this report

Property values are up 2.5 percent across Tarrant County from a year ago, a jump of \$3 billion, giving some hope that the market is on the rebound. "It kind of tells me the economy has at least flattened out or is up a little bit," Tarrant County Judge Glen Whitley said. But the bounty didn't fall evenly, according to preliminary assessments from the Tarrant Appraisal District. In the largest cities, including Fort Worth, Arlington and Mansfield, taxable property values increased more than 3 percent. Grapevine's values rose 6.5 percent and North Richland Hills' rose 5.4 percent. Among smaller cities, Westworth Village saw an 11 percent jump, primarily from previously tax-exempt properties being added to the tax rolls. But Haslet and Blue Mound saw steep declines: 10.7 percent and 8.7 percent, respectively.

The results for individual properties were a mixed bag as well. About 15 percent of residential and commercial properties -- 77,400 in all -- increased in value for fiscal 2012, according to the appraisal district. However, 25 percent, 129,900, declined in value, and 59 percent, 304,300, had no change. New taxable construction represents 5,833 properties, or about 1 percent. Yet new construction lifted the county's property values by more than \$1 billion, according to preliminary statistics from Chief Appraiser Jeff Law.

New residential properties added \$840 million to the county's net taxable value, accounting for about 1.2 percent of the taxable value of all residential properties, he said. About \$608 million in commercial taxable property was added, or 1.7 percent of all commercial properties' taxable value, Law said. "There are some properties out there that have been constructed that are part of the commercial sector that are exempt," Law said. "That could be something like schools or something that the city or county owns." But "we were never going to tax those to begin with," Law said. Officials caution that the numbers are preliminary and will likely be adjusted as property owners appeal their valuations.

**Rebounding values**

Fort Worth's property values rose \$1.4 billion, or 3.5 percent, to \$42.8 billion. That is exactly what the city expected when it told the City Council this month that its budget gap would be \$23.7 million next fiscal year. Budget officer Horatio Porter expects about a 2 percent gain after protests are heard. "I believe we've seen property values hit bottom," Porter said. "We won't see double-digit gains like what we saw in the '90s, but it has stabilized and I think we will see slow, steady growth." The gains won't be enough to prevent difficult budget decisions. "The revenue just can't grow fast enough to keep up with all of the needs we have in the city," Porter said.

Arlington's preliminary values rose to nearly \$18 billion, up 3.8 percent. Budget Manager Mike Finley said that if the values hold until the tax rolls are certified in July, Arlington's property tax

revenue for next fiscal year will be \$2.1 million higher than projected. "It's better than we were expecting," Finley said. "We were expecting to be flat." Finley attributed the bump in valuations to factors such as commercial development and the transformation of a former Trinity River flood plain into residential lots for the Viridian community. The project, under construction in far north Arlington, is expected to eventually add 15,000 residents and more than \$2 billion to the property tax rolls, city officials have said. Arlington's sales tax revenue for the first six months of this fiscal year is up 5.3 percent. That's good news for the city, which is working to erase a projected \$4 million budget shortfall for fiscal 2013, which starts Oct. 1.

In Grapevine, where attractions like the Sea Life Aquarium and Legoland brought in revenue, values increased \$394 million. John McGrane, Grapevine's director of administrative services, said that he hasn't analyzed the appraisal values but that the city expects improvements from last year.

In North Richland Hills, preliminary values increased \$197 million, slightly higher than expected. Even taking into account the post-appeals drop, Assistant City Manager **Karen Bostic** said, the appraisals could put the city back at 2008 levels -- before the recession. "Hopefully it will mean we won't have to make further reductions like we did in recent years," she said.

Tough times for some

For Haslet, where preliminary values fell by \$86 million, the biggest factor was a drop in the value of mineral leases, from \$182 million to \$103 million, City Administrator Ashley Stathatos said. One of the more unusual decreases was in Blue Mound, where Mayor Alan Hooks said residents' high water bills are driving down property values. The city's water and sewer system is owned by Monarch Water Utilities. "People are not going to come out here and buy unless it's a cheap, cheap deal," Hooks said. "That's what's happening -- people are dumping these houses. It's going to be a tough budget next year. It's going to be pencil-sharpening time and time to get out our red pens." Increases in property values mean little to struggling school districts, many of which are looking to cut staff and programs amid multimillion-dollar shortfalls.

A complex state school finance system, which is being challenged in court this fall, essentially funds schools based on a weighted per-student formula. If a district's property tax revenue improves, the state reduces its aid. If tax revenue drops, the state makes up for the loss. The Fort Worth school district, for example, had the largest increase of taxable property value, about \$945.8 million. If not for the state funding system, that could have meant \$9.8 million more for schools. The district is facing about a \$40 million shortfall next school year. "We are happy to see growth in the tax rolls," said Hank Johnson, the district's chief financial officer. However, "it will have little impact on the current funding situation."

In the Grapevine-Colleyville district, the overall taxable value had one of the highest percentage increases in the county, improving 4.6 percent, or \$485.2 million. Grapevine-Colleyville, Fort Worth and many other local districts are among the hundreds suing the state over how schools are funded.

Fort Worth Star-Telegram (TX)  
April 25, 2012

**North Richland Hills seeks voters' OK for new municipal complex funds**

Author/Byline: Jessamy Brown

Taxpayers in North Richland Hills are being asked to increase the city's debt by about 50 percent to help pay for a new municipal complex that would consolidate offices. Voters will have to decide whether that makes fiscal and logistical sense in a May 12 referendum on whether to authorize issuing up to \$48 million in bonds for the complex, which may be on Boulevard 26, at the site of the old North Hills Mall. The additional debt would prompt the first property tax rate increase in 19 years, and the city would also tap reserves and other funds to complete the \$70 million project.

The city already owes a total principal of \$95.6 million in debt, including \$71.6 million in debt supported by property taxes. "There are some that will be paid off in the next few years. We can put that money toward the new debt," Assistant City Manager **Karen Bostic** said. About \$24 million of the total debt is being paid off by other revenue sources, such as fees from users of the Iron Horse Golf Course and NRH { -2 } O water park.

Councilman David Whitson, who headed a 26-member community task force that recommended the project, said he is comfortable with the city's debt load. "I'm going to be pushing to have that debt paid off sooner than what the term is," Whitson said. The bonds would add 3 to 4 cents to the current tax rate of 57 cents per \$100 of assessed property value. That would add about \$49 a year to the tax bill for a house valued at the city average of \$122,317. The tax rate would not change for senior citizens and other homeowners whose property taxes are frozen. Besides the bonds, the city would still need an estimated \$22 million from capital reserves, plus money from selling buildings that house its current offices on Northeast Loop 820, which officials think will be attractive to commercial or retail developers.

Staffers have moved out of the city offices that housed the library and recreation center and into new facilities. The Municipal Court, parks administration and Citicable continue to operate there. That building, at Northeast Loop 820 and Rufe Snow Drive, is not on the market. But undeveloped land on the site has been sold to firms headed by Dustin Renfro of Hudson Oaks. The city sold 1.04 acres for \$800,000 for the development of a Taco Cabana and 1.17 acres nearby for \$530,000 for a future In-N-Out Burger. A 0.9-acre tract is being marketed for sale by Renfro's Gridiron Capital, which has right of first refusal to buy it. Officials also expect an unspecified amount of compensation from the state from work on the North Tarrant Express project to widen Northeast Loop 820.

The cost of the project and square-footage needs were estimated after an architectural firm performed a space analysis. The budget includes money for land, road work, furnishings and buildings. But plans are to bring the project in under budget, said Jimmy Perdue, the city's public safety director. "We're hoping and planning all along to reduce the project costs as we get into

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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the design," Perdue said. "We knew that we needed to know what the outside number was because the worst thing is to ask citizens for funds and come back and ask for more."

#### Moving in 2015

The proposal to move was prompted by state work to widen Northeast Loop 820 to 14 lanes, which will cut a third of available parking spaces, restrict access to City Hall and limit space for landscape buffers, Assistant City Manager Jared Miller said. The plan calls for city operations now in six buildings to move to a 180,000-square-foot complex by late 2015. The complex would house City Hall, parks administration, Municipal Court, the Police Department and jail, fire administration and neighborhood services.

"The different city departments are pretty spread out right now," said Mike Rigby, market president for Liberty Bank and a committee member. "I think that the structure that is proposed is reasonable. I don't think it's elaborate or a Taj Mahal."

This month, the City Council moved forward with an agreement that gives the city the option to buy up to 12 acres at the vacant site of the former North Hills Mall at Boulevard 26 and Rodger Line Drive, which would cost about \$2.6 million. That would leave about 68 acres available for development. Nearly 3,000 people come to city offices each week, and bond supporters say they hope a municipal complex would spur economic development inside the Loop.

"We hope that activity of coming to the city facilities will find it attractive to new businesses," said John Lewis, a former councilman and treasurer of NRH4U, a committee launched to support the bond proposal. The group is hosting coffees, meeting with voters and sponsoring a billboard on Davis Boulevard touting the project. No organized opposition has surfaced. The city is hosting several informational meetings to answer voter questions. One of three voters at a Thursday meeting at Green Valley Elementary School asked what might happen if the bond vote fails. Doing nothing is not an option, they were told.

Fort Worth Star-Telegram (TX)  
February 27, 2012

**Task force recommends new city complex for North Richland Hills**

Author/Byline: Lois Norder

The city should build a \$70 million municipal complex to house City Hall, municipal courts, the Police Department and other offices, a citizens task force is recommending to the City Council. One option for location of the complex is the existing City Hall site just north of Northeast Loop 820 near Holiday Lane, which would require the city to buy out some nearby homes. The other option the Community Improvement Program task force is eyeing is south of the loop, on a portion of the former site of North Hills Mall. The recommendation will be presented to the council tonight, and a vote is expected at its March 5 meeting. If the council endorses the recommendation, a bond issue to help pay for the complex could be on the May 12 ballot. City officials are working to determine what the bond amount would be.

The 26-member task force recommended a tax rate increase of up to 4 cents per \$100 of assessed property valuation to pay for the bonds, city officials said. A 4-cent increase would mean a tax hike of about \$48 a year for a house at the city's average taxable value of \$122,317. "There would be no impact for seniors over 65 [years old]. Their tax rate is frozen," said Assistant City Manager **Karen Bostic**. The last increase in the city's property tax rate was in 1993. At 57 cents per \$100 assessed value, North Richland Hills' current tax rate falls in about the middle of the pack of other Tarrant County cities.

Still, passage of the bond issue will require a "vigorous education campaign," Mark DelSignore of Perception Insight told the task force at a Thursday night meeting. That's because about 46 percent of likely voters are not aware that work on the North Tarrant Express highway project will encroach on some of the city facilities, and 22 percent of likely voters believe that the city already has excellent facilities, according to a mid-February survey conducted by Perception Insight. But the survey also indicated likely good support for a new public safety building, and a strong perception that the city manages its money well. "A public education campaign, if done effectively, can move the needle forward," DelSignore said.

**Other funding**

City officials said they have worked to pare down the cost of the complex. Money to pay for it could also come from several sources in addition to the bond sale, **Bostic** said. Compensation from the Texas Department of Transportation for the impact of the work on Northeast Loop 820 could bring some money, though the amount is unknown because the city is in litigation with the department over the issue. The city could also sell the property south of the loop where the municipal courts are housed, and if it built on the North Hills site, it could also sell the existing municipal complex property. The property south of the loop was appraised in 2008 for about \$4.5 million; the municipal complex has a Tarrant Appraisal District value of just under \$6 million. The city could also draw money from its capital reserves. The city has \$7 million set aside to address facilities needs related to the loop expansion, with much of this money from gas leases and other nonrecurring sources. City Manager Mark Hindman told the task force that the



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**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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city could try to further scale back construction plans to limit the tax increase to 3 cents. That would keep the tax rate at about 60 cents, which Hindman called a "psychological threshold." But task force member Jay Garner said the city needs to consider future needs. "Don't poor-boy this," he said. The city doesn't need a "Taj Mahal, but nice," Garner said.

**Economic driver**

The present municipal complex, which houses City Hall and public safety facilities, was built in stages over the years, with the oldest portion of the building dating to 1975. The building was expanded in 1995, though that addition represents only about 23 percent of its total square footage. The North Tarrant Express project, which widens the highway and service roads, will eliminate what city officials say is a significant portion of the parking at that facility and at the building south of the loop that houses municipal courts. That building is a former church built in 1968 and acquired by the city in 1985.

To build a new complex at the present City Hall site, the city would expect to buy out 15 nearby houses at an estimated cost of about \$1.9 million. Buying property at the former mall site could cost an estimated \$2.5 million, with the city needing about 12 acres of the 80-acre property. That location would bring the additional benefit of helping drive economic development, said Councilman David Whitson, chairman of the task force. He said that a municipal complex there would prompt redevelopment of the entire mall property. The city has been focusing economic development efforts along the Boulevard 26 corridor. Since North Hills Mall was demolished in 2007, after sitting vacant for three years, the site has not been developed. Tax records show that the property owner lives in California. A new city complex would be the costliest project in city history.

The city is building a new recreation center in the north part of the city, close to the \$10 million library that opened in 2008. The recreation center, set to open in mid-April, has a projected cost of about \$25 million, which had been the highest price tag so far. The city issued certificates of obligation for that project, which didn't require voter approval. That debt is expected to be paid with revenues from a special tax district in the area.

Construction on the new city complex, in the best-case scenario, would begin in the summer and be completed by 2015, according to information provided by Mary Peters, the city's public information officer. In addition to City Hall, municipal courts and the Police Department, the complex would include some offices that had been housed at city facilities on Dick Fisher Drive.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
September 11, 2011

**Tarrant water limits working better than expected - Region now using 8.5 percent less water, saving 337 million gallons every 10 days**

Author/Byline: Susan Schrock and Bill Hanna; Staff writers Eva-Marie Ayala, Adrian McCandless, Nicholas Sakelaris and Gene Trainor contributed to this report, which includes material from the Star-Telegram archives

Most Tarrant County residents and businesses have apparently turned off the tap on days when they're not permitted to water their lawns and landscaping. The Tarrant Regional Water District, which provides raw water to most of the county, said water usage has dropped about 8.5 percent since twice-a-week watering restrictions took effect Aug. 29. That beat the goal of reducing consumption by 5 percent, said David Marshall, the district's engineering services director. "We saved about 337 million gallons" every 10 days, about a day's consumption previously, Marshall said. With high temperatures and precious little rainfall decimating the region's drinking water supply, the district imposed restrictions on the heaviest water usage -- irrigation -- and limited sprinkler use to two specific days a week. While most customers are following the widely publicized schedules, city officials around the county said citations have been issued to repeat violators. In Southlake, for example, more than 80 citations were issued in the past two weeks, they said. Those watering on their off-days are notified about the restrictions and given at least one warning before being issued a citation, which can cost up to \$2,000 per violation.

Arlington has investigated 173 reported violations but has issued only 27 notices of violation and one citation. "We have issued notices," said Julie Hunt, Arlington's water utilities director, adding that the city's daily water consumption has dropped 5 percent or more. "We figure most people [improperly watering] didn't get the word. Somehow they hadn't heard yet." Marshall said the district has "seen a dramatic drop" of 140 million to 340 million gallons a day on Mondays, when all commercial or residential irrigation is banned. On Tuesdays, when only commercial irrigation is allowed, daily usage has plummeted about 76 million gallons, to just over 400 million. But Wednesdays and Thursdays, which are residential usage days, have seen only a drop of about 2 percent, to around 480 million gallons a day. "Folks are watering what they need to water, but now they're doing it only two days a week," Marshall said.

**Encouraging early numbers**

In Fort Worth, Water Department officials are trying to educate residents rather than fining them or locking them out. Since the restrictions took effect, Fort Worth's water usage dropped about 14 percent, from 333.4 million to 287.9 million gallons a day. "Early numbers are encouraging, but we will continue to track it once hotter temperatures return" this week, department spokeswoman Mary Gugliuzza said. Fort Worth received 691 complaints of violations through its website and 275 complaints by phone. Most dealt with people watering on the wrong day of the week, Gugliuzza said. So far, she said, repeat violations have been reported at three addresses. In some instances, the city's own parks department watered at improper times, Gugliuzza said. But those have been addressed. "We've had conversations with them," she said.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Gugliuzza couldn't give a breakdown of how many violations had been reported at parks and schools.

**Northeast Tarrant cities**

Southlake has been aggressively enforcing water restrictions since July 25, issuing more than 1,600 warnings and 298 citations. But some customers are continuing to violate the limits, and the city has issued 280 warnings and 83 citations for repeat offenders in one recent nine-day period, city spokeswoman Pilar Schank said. And the city itself suffered a lapse. Last week, a Southlake employee was disciplined for letting a sprinkler system run after 10 a.m. at the Department of Public Safety headquarters, where workers were installing a new irrigation controller.

Colleyville issued 130 warnings and four citations in the first week of Stage 1 restrictions, spokeswoman Mona Gandy said. Water consumption has gone down 22 percent since the restrictions took effect, Gandy said.

In Grapevine, water consumption has dropped 3 million to 4 million gallons a day, said Matt Singleton, public works director. Violators have gotten a knock on the door or a door hanger from the city staff as a warning, Singleton said. Grapevine hasn't issued any citations.

North Richland Hills hasn't issued any citations, either, said **Karen Bostic**, assistant city manager. However, the city has placed 129 door hangers to warn people that they are violating the restrictions. If they ignore the warnings, they could face citations, **Bostic** said.

Only one citation has been issued in Bedford, where city spokeswoman Mirenda McQuagge-Walden said warnings are typically issued for first offenses. Enforcement officers patrol Bedford to remind residents about water conservation measures, she said. Water use has dropped 20 percent since restrictions began, she added. "Most customers seem to understand the necessity to reduce water use," she said. "Most of the questions have been concerning clarification about watering by hand, drip irrigation and soaker hoses." No citations have been issued in Euless or Hurst.

Keller has seen a 5 to 15 percent drop in water use, said Greg Dickens, public works director. The city hasn't issued citations, but it has given out a few warnings, he said. Apartment complexes and businesses have been the main violators, he said. Many have simply forgotten to adjust the timers on their sprinkler systems. "After we have spoken with them, they have been more than willing to comply with the restrictions," Dickens said.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
February 25, 2011

**Customer wins dispute over water bills**

Author/Byline: Dave Lieber

You can't squeeze blood out of a turnip, and, usually, you can't convince your municipal water company that its meters are bad. Water departments are notoriously stubborn. Their culture is built around the idea that water meters are supposed to be about 99 percent accurate. But what about the other 1 percent? Usually, it's a duel between homeowner and water department. The homeowner swears on a stack of skyrocketing water bills that the family didn't use nearly that much water. The water department counters that there must be a leak. Homeowner hires a plumber. That bill is often very costly, whether there's a leak or not.

How do you get a water department to listen? The Watchdog met someone who figured it out. Carolyn Fobes could teach a class on how to fight - no, make that convince - city hall. She's a four-time cancer survivor who says: "I don't give up easily. I play to win." These days, that's an art all its own. Her first student could be Letha Wood of Fort Worth, who told me last week how her monthly water bill jumped from its usual \$50 to \$104, then to \$119, \$176, \$288 and \$329. She and her husband didn't figure out until months too late that they had a leak. The plumbing repair job cost \$2,200. Fort Worth reimbursed the couple some \$180 under its leak adjustment policy. (The city credits an account for 50 percent of the excess water use for up to two months based on historical usage.)

That was a difficult experience for Wood and her husband, both almost 90 years old. Fobes can relate. Her bill jumped from \$66 to \$194 in one month. Of course, she was told that she had a leak, too. "After paying \$800 to a national plumbing company, we were told we had no leak," she recalls. "We paid the water bill, even though we believed it to be erroneous." Then her bill spiked again from one month to the next - \$61 to \$195. Guess what the water department told her? This time, she visited the water department "in person," she says. She requested a bill adjustment. Denied. She put her request in writing and was again denied. She sent her protest to the mayor and public works director, too. Since the same thing had happened twice, she reasoned that either the equipment was faulty or her meter was misread.

Two months later, she received a robo-phone call announcing that her water was going to be turned off because she hadn't made her entire payment. She called the city manager's office and requested a meeting. She was referred to North Richland Hills Assistant City Manager **Karen Bostic** who - wait for it - took her seriously. **Bostic** recalls what happened: "She did a lot to help herself. She continued paying her current bill. ... She didn't get angry and say, 'I'm not paying a dime.' "It's easier to work with someone when you know there's no game playing. A number of people run into financial trouble and instead of calling the water department, they just stop paying bills. ... If they would just call when they start having financial problems, 99 percent of the time we're willing to work with them." The city allows for adjustments when there is evidence of a leak and receipts can prove that repairs were made. In Fobes' case, nobody knows what happened. That didn't stop her. **Bostic** said she was impressed by Fobes' tone: "She was

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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very reasonable and logical. She had all her information at hand. She wasn't argumentative. ... I've had people who don't have all their ducks in a row."

Good water metaphor. That's how Fobes originally got my attention. She wrote me: "I'm getting hosed." Her clear presentation of her problem is impressive. "I was a journalism major in college," she says, "but have spent most of my life in accounting. Both professions require research and organization skills." Don't forget true grit. Fobes has that - and a victory. "My tenacity has paid off," she says.

**Bostic** totaled Fobes' water usage for six years, deducted the highest and lowest, calculated a four-year average, then deducted what had already been paid. (Kids, see why math is important?) The city cut almost \$200 from her bill, though officials still don't know what caused the spikes. **Bostic** called them "very odd." "All is right with the world," Fobes says.

Fort Worth Star-Telegram (TX)  
August 30, 2010

**North Richland Hills trimming expenses to balance budget**

Author/Byline: Chris Vaughn

City officials, facing another year of bleak revenue projections, have recommended that the City Council eliminate six positions, freeze salaries and pass more healthcare costs on to employees to balance the 2010-11 budget. The council, at the Sept. 13 meeting, is also expected to adopt the same property tax rate, 57 cents per \$100 of assessed value, the 18th year in a row that number hasn't changed.

Despite the cutbacks that affected virtually every department, budget officers expressed relief that they had to cut only about \$1 million from the 2009-10 budget. They had predicted a more severe drop in property values than the 4 percent announced in July by the Tarrant Appraisal District. "Even though it's bad news, we're very, very happy that it wasn't as bad as we anticipated," Assistant City Manager **Karen Bostic** said.

City officials said they hope that the city's 65,000 residents won't notice the cuts since the 533 full-time city employees will bear most of them. The goal, they said, was to trim around the edges and not cut "core services," nor did they want to dip significantly into the reserve funds to make up the difference. "We made a conscious, specific effort not to touch the reserves," said Mark Mills, the budget director. "Mark [Hindman, the city manager] preaches to make changes you can live with from this point forward. The cuts must be sustainable long-term."

The proposed general fund amounts to \$37.35 million, roughly the same as the 2007-08 budget. City officials have had to make cuts three years running. The capital projects budget for 2010-11, which provides funding for streets, drainage projects and the like, comes in at \$33.3 million. The biggest dip in revenue will come from lower property valuations, about \$835,000 less in tax revenue this year. Sales taxes are expected to remain basically flat. Other revenue sources -- franchise fees, fines, facility rentals and ambulance charges -- are also expected to be down.

The city will make up about \$350,000 of the difference through ordinary department budget reductions. The city is also eliminating six positions, though only two are filled, and freezing salaries. Additionally, the city is cutting back programs shown on Citicable and hopes to eliminate \$100,000 in overtime, which primarily comes from the police, fire and water departments.

Although the city will continue to pay 80 percent of the healthcare premiums for employees, employees will have to shoulder higher deductibles and out-of-pocket expenses. Untouched by the downturn in revenue will be the city's new recreation center, which is slated for construction this fall. Money for that capital project is coming almost entirely from the tax-increment financing district in the HomeTown NRH area.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
August 16, 2009

**North Richland Hills avoiding deep cuts**

Author/Byline: Chris Vaughn

\*The city will leave core services alone in next year's budget, but employees will likely feel some effects.

City planners have arranged for a nip and a tuck here and there in the proposed 2009-10 budget but are confident that residents won't notice any changes in the core services of police, fire, streets and water. The city's tax rate of 57 cents per \$100 of assessed property value will also remain unchanged for the 17th year in a row. But the city does expect to use a new state law that allows a half-cent sales tax to be applied to gas and electric bills to help fund the Police Department. The people who will definitely notice the budget cuts are the 535 city employees, who will be making do with smaller pay raises and higher premiums and out-of-pocket expenses for health coverage. In addition, a few jobs will be eliminated, though no full-time employees will be laid off.

"I wish we didn't have to eliminate any positions, and I wish we could give a 4 percent pay raise," said **Karen Bostic**, assistant city manager in charge of finances. "But what we presented to the council is reasonable and reflects where we are with the economy. It's what we had to do to have a balanced budget."

Next year's operating budget, which is scheduled for a City Council vote in September, totals \$37.6 million, a decrease of 1.6 percent from the budget approved last year. But the city has essentially been living with that lower level of funding for some months now. This year's budget had to be tightened midyear when sales tax revenue and new home starts dropped severely. Sales tax revenue is down 9 percent this year, the lowest level in the city since 2006. Property values stayed essentially flat this year, and no one expects the residential construction industry to rebound in the next year, which also cuts deeply into revenue from permits. City leaders do not expect further declines or increases in revenue in 2009-10. "We're hoping we made the cuts where the citizens won't feel the impact," Mayor Oscar Trevino said. "We didn't cut into bone or anything that is going to hurt us in the long run."

Under the proposed budget, the cuts look like this:

The elimination of six full-time positions, including the city's webmaster, wellness coordinator and a building inspector. Four of the positions are vacant. The two affected employees will be moved to vacant positions. The city also wants to eliminate four part-time positions. The savings will be \$363,000.

The suspension of wage increases based on length of service and a maximum merit pay raise of 2 percent. The savings is estimated at \$848,000. A delay in buying new vehicles, computers and other big-cost items, which would save \$850,000. A reduction in overtime by \$74,000 and cuts of \$92,000 in the training and travel budget. The elimination of several community events,



**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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including the AARC Walk-a-Thon and Fido Fest, and the suspension of the autumn concerts in the parks and Discover Project Green. The city would also withdraw its support of two events with the Northeast Tarrant Chamber of Commerce. The savings are estimated at \$53,000.

City leaders did not make any substantial cuts in the police and fire departments, and the budget contains \$900,000 for street maintenance and \$25 million for major street overhauls. "We're continuing to spend money on street maintenance in and around the south side of town," Trevino said. "That is critical. Those are things the citizens see."

**Budget highlights**

Proposed tax rate: 57 cents per \$100 of assessed value, same as now. If a house is valued at \$100,000, the taxes would be \$570 a year, with no exemptions. No service cuts for residents are planned. However, several city-sponsored events have been canceled or suspended.

Inside City Hall, six full-time and four part-time positions will be eliminated, and employees will see higher deductibles, co-pays and premiums for health coverage. Employees will see merit pay increases capped at 2 percent instead of 4 percent and will receive no pay increase based on years of service. Ambulance fees will increase from \$500 to \$578.

Beginning in January, the city will collect a half-cent sales tax on gas and electric bills for use in the crime control district. That is expected to raise \$190,000. Sales taxes for the general fund and parks fund are already collected on utility bills.

Almost \$1.4 million will come to the city from the federal stimulus package. It will be spent on buying cleaner diesel vehicles, developing a trail, helping make low-income houses energy efficient and improving storm water drainage.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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[CB&A Note: Only the information relevant to **Karen R. Manila** is listed below.]

Fort Worth Star-Telegram (TX)  
June 9, 2009

**Area cities tighten belts in tough times**

Author/Byline: Melody McDonald; Staff writers Chris Vaughn, Mike Lee and Susan Schrock and correspondent Robert Cadwallader contributed to this report.

\*Municipalities are adjusting their budgets as tax collections and other revenue continue to slide

Call it the budget blues. City managers across North Texas have crunched the numbers, and the news is not good. Sales tax revenue is down. Building permits have dropped. Investment returns are lukewarm. Regionwide, cities are projecting significant budget shortfalls for the rest of the fiscal year and are working to compensate. Strategies include layoffs, turning off streetlights, cutting spending for libraries and eliminating pay raises. Here's a look at how some North Texas cities are faring in the down economy.

**North Richland Hills**

The third-most-populous city in Tarrant County projects \$1.2 million less in revenue this fiscal year, prompting officials several months ago to begin cost-cutting measures. The city, which has a \$38.9 million general fund, has delayed hiring, except for police and fire positions, and postponed several capital purchases such as vehicles and computers. The city also immediately reduced its travel and training budget and has worked to minimize overtime. "We try to avoid cutting anything that touches our citizens until later in the contingency plan," said **Karen Bostic**, assistant city manager in charge of finances. "We've already been able to achieve the \$1.2 million [in cuts], so unless something extreme happens, we don't think we'll need to make any major additional reductions." The city has been hit from three directions -- lower sales taxes, a precipitous drop in construction permits and losses in investment income. Specifically, the city is anticipating close to \$650,000 less in sales tax revenue and \$528,000 less in revenue from construction permits.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
January 18, 2009

**Cities seeing lower revenue from sales tax**

Author/Byline: Adrienne Nettles and Kevin Lyons

This report includes material from the Star-Telegram archives.

\*The continued decline in sales tax revenue is starting to concern some Northeast Tarrant city officials.

Communities in Northeast Tarrant County are seeing less sales tax revenue, and officials say the nation's ailing economy, local business woes and a shorter holiday shopping season last year are to blame for the slump. A January report from the state comptroller's office shows a comparison of cities' sales tax collections in November 2007 and November 2008, the latest numbers available. And the numbers aren't good for many area cities. For the most part, local officials attribute the dips to the poor economy.

**North Richland Hills**

North Richland Hills, the largest city in Northeast Tarrant County, saw a decrease of about 13 percent in sales tax revenue for a number of reasons, Assistant City Manager **Karen Bostic** said. The city lost several businesses in 2007, including a Barnes & Noble, Broyhill Furniture, TGI Friday's, Bennigan's and Ryan's Family Steakhouse, she said. "Also, Thanksgiving fell later this year, and there were fewer shopping days in November," **Bostic** said. "I expect the December numbers to look better because that's when the bulk of Christmas shopping was done." When the economy gets tight, people tend to spend more at discount stores, which also helps sales tax receipts rebound, **Bostic** said. North Richland Hills is counting on shoppers to spend more at the city's two Wal-Marts, Target and Burlington Coat Factory. "These are stores that are a little more recession-proof," **Bostic** said.

**Sales tax setbacks**

Many Tarrant County cities saw a sharp decline in sales tax revenues. To check your city's information, visit [www.window.state.tx.us](http://www.window.state.tx.us) and search for "local sales tax summary." The figures are based on sales in November 2008 compared with sales in November 2007:

Arlington: \$5.5 million, down 8.3 percent from \$6 million  
Fort Worth: \$7.774 million, down 1.6 percent from \$7.90 million  
Grapevine: \$2.378 million, down 13.7 percent from \$2.754 million  
Hurst: \$1.119 million, down 4.9 percent from \$1.177 million  
Keller: \$469,820, down 8.9 percent from \$515,952  
Southlake: \$1.151 million, down 3.8 percent from \$1.197 million  
Euless: \$846,072, down 15 percent from \$995,943  
Bedford: \$635,667, down 13 percent from \$730,589  
Colleyville: \$256,069, up 10.3 percent from \$232,022  
Haltom City: \$578,549, down 4.9 percent from \$608,349  
Flower Mound: \$692,696, up 35.9 percent from \$509,834

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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North Richland Hills: \$895,295, down 12.9 percent from \$1.028 million  
Richland Hills: \$101,795, down 28.2 percent from \$141,930  
Watauga: \$298,329, down 0.73 percent from \$300,521  
Westlake: \$906,656, up 175 percent from \$329,418

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
June 27, 2006

**City may use revenue from drilling for sales tax slump**

Author/Byline: Sarah Bahari

Revenue from gas wells on city property could be used to offset lagging sales tax revenue, pay for one-time improvements and help attract and retain more businesses. The City Council voted unanimously Monday night to adopt guidelines that will help decide how to spend the money.

The city, which has a \$33 million annual budget, should not become over reliant on these revenues because it is not known how long the money will trickle in, Assistant City Manager **Karen Bostic** said.

Last year, North Richland Hills approved drilling in the Barnett Shale, the vast underground gas field beneath Tarrant and neighboring counties. The regulations were intended to allow drilling but also to protect residents from noise and eyesores. In May, the City Council cleared the way for drilling under four city parks.

Only one park, Fossil Creek, will be allowed to have a rig on the property. Gas deposits under the other parks — Northfield, Richfield and Linda Spurlock — will be reached through horizontal drilling.

Two companies, Four Sevens and the Harding Co., will initially pay the city about \$363,409 for mineral rights. After that, North Richland Hills will receive 25 percent of royalties. That money could take months or years to trickle in, and the amount depends on the productivity of the wells, Assistant City Manager Bo Bass said.

**Internet – Newspaper Archives Searches**  
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*(Articles are in reverse chronological order)*

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[CB&A Note: Only the information relevant to **Karen R. Manila** is listed below.]

Dallas Morning News, The (TX)  
December 3, 2004

**NEWS BRIEFS**

Author/Byline: Unknown

**NORTH RICHLAND HILLS**

Cable company wants to extend city contract

Charter Communications has requested renewal of its franchise agreement with North Richland Hills, which expires in 2007. The company provides cable TV and high-speed Internet for the majority of the city.

The city is soliciting public comments regarding the company's service and the community's cable-related needs.

Residents can make comments at the Dec. 13 council meeting. They can also submit feedback at the city's Web site at [www.ci.north-richland-hills.tx.us](http://www.ci.north-richland-hills.tx.us). Mail comments to **Karen Bostic**, Managing Director, City of North Richland Hills, 7301 NE Loop 820, North Richland Hills, Texas 76180.

For information, call **Karen Bostic** at 817-427-6005.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
July 22, 2004

**North Richland Hills studies options for senior tax freeze**

Author/Byline: John Kirsch

Freezing city property taxes for older and disabled residents would cost North Richland Hills nearly \$5 million over six fiscal years if those who are eligible keep their current homestead exemptions, according to a city study. The study of five tax-break options comes as residents prepare to vote Sept. 11 on whether the city should approve the senior tax freeze. Mayor Oscar Trevino said the City Council will follow the outcome of the nonbinding resolution. Under the provision, city property tax bills for residents 65 and older and those with disabilities could not increase from current levels. The tax bill would increase only if a home has a major improvement. School property taxes are already frozen for seniors and the disabled.

The study, conducted by city staff members, examined the consequences of existing and proposed tax breaks for eligible taxpayers. Under the most costly option, the city would lose \$4.7 million over six years. That option includes approving the freeze and keeping the existing \$36,000 homestead exemption for seniors and the disabled. The city's current annual operating budget is \$31.1 million. The least expensive option -- adopting the freeze and repealing the exemption -- would cost the city \$1.5 million over six years, the study reports.

Under the homestead exemption, a senior or disabled taxpayer can deduct \$36,000 from the value of a home, reducing tax bills. That is in addition to the 15 percent exemption that all eligible North Richland Hills homeowners receive. About 3,000 taxpayers receive the \$36,000 senior and disabled homestead exemption, said **Karen Bostic**, city managing director of administrative and fiscal services.

Councilman Frank Metts, who opposes the freeze, said it could force cutbacks in city services. The better option would be to increase the homestead exemption, but Metts said he does not have a specific figure in mind. Councilwoman Nancy Bielik, who favors the tax freeze, said taxes from new subdivisions would help offset money lost because of the freeze. "It's not going to bankrupt us," Bielik said.

North Richland Hills is not alone in weighing the senior tax-break issue. Of the 42 taxing entities in Tarrant County, 12 have approved the freeze, according to the city study. The Haltom City Council adopted it July 12. Richland Hills is one city that is not considering the freeze. Officials in that city are considering increasing the senior homestead exemption from \$20,000 to \$30,000. About 20 percent of Richland Hills residents are 65 or older, and officials fear the freeze would cripple the city's finances. As of April, 18 Texas municipalities, nine counties and two junior college districts had adopted the freeze, according to the state comptroller's Web site. The freeze became an option after September when voters statewide approved a constitutional amendment.

City financial impact

Cost of tax-break options for elderly and disabled taxpayers in North Richland Hills:

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fiscal year 2003-04\* 2004-05 2005-06 2006-07 2007-08 2008-09 6-year total Option 1 \$605,000 \$620,000 \$640,000 \$645,000 \$650,000 \$660,000 \$3.8 million Option 2 \$605,000 \$620,000 \$705,000 \$795,000 \$890,000 \$990,000 \$4.6 million Option 3 \$605,000 \$0 \$85,000 \$175,000 \$270,000 \$370,000 \$1.5 million Option 4 \$605,000 \$620,000 \$725,000 \$815,000 \$920,000 \$1 million \$4.7 million Option 5 \$605,000 \$620,000 \$695,000 \$740,000 \$780,000 \$830,000 \$4.2 million

Option 1: Do not adopt senior and disabled tax freeze, maintain existing \$36,000 homestead exemption for elderly and disabled.

Option 2: Adopt tax freeze in 2004 and repeal homestead exemption in 2005.

Option 3: Adopt freeze in 2004 and repeal exemption in 2004.

Option 4: Adopt freeze in 2004 and continue exemption.

Option 5: Increase exemption without adopting freeze.

\*current fiscal year



**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
June 15, 2004

**City to consider tax freeze later**

Author/Byline: John Kirsch

Councilwoman Nancy Bielik's effort to force a City Council vote Monday on a senior tax freeze failed after the panel agreed to proceed with plans to discuss the issue later this month. Bielik, who favors the tax break, had asked City Manager Larry Cunningham to place it on Monday's regular meeting agenda for a possible vote. Instead, Cunningham put the item on the agenda for the informal work session, where no votes can be taken. Cunningham is in charge of putting together council agendas.

In a letter Wednesday to Bielik, Cunningham pointed out that the council agreed May 24 to discuss the freeze at its second meeting in June. Bielik was elected May 15 but had not been sworn in when the council reached that decision. A majority of the council informally agreed Monday to continue with that plan. Bielik said she was unhappy with the decision not to vote but would continue working for the tax break.

At the May 24 council meeting, the panel discussed calling a nonbinding election, or straw vote, on the freeze for Sept. 11 as a way to gauge public opinion. Opponents of the election, such as Bielik, say it is unnecessary. That, she said, is because most North Richland Hills voters made their views known by voting in September for a constitutional amendment giving cities and counties the option of enacting the tax freeze. Ten local cities, including Colleyville and Southlake, have approved the tax break since September. Under the change, the dollar amount of city property taxes for qualified taxpayers would not increase for those 65 and older or disabled. Backers of the freeze say it gives a needed break to older residents who have paid rising city property taxes for years.

North Richland Hills grants a \$36,000 homestead exemption each year to taxpayers 65 and older. Critics said they are afraid that the freeze would deprive the city of property tax revenue. **Karen Bostic**, who handles budget issues for the city, said Monday that she is gathering information for a report on the freeze's effect. She will deliver the report to the council June 29. The council was to meet June 28 but voted to move the meeting to June 29 because of scheduling conflicts.

Bielik replaced Joe Tolbert in the May 15 election. Jo Cox, who also backs the senior tax break, was elected to replace Scott Turnage.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
February 24, 2003

**Few area cities show tax gains**

Author/Byline: Ellena Morrison; Staff Writer Mike Lee and Correspondent Brenda Edwards  
Bernet Contributed to This Report.

Grapevine posted record-breaking sales-tax revenues during the first quarter of its fiscal year, which officials say could help cushion possible economic setbacks later. Southlake and a few other communities also saw gains during the first quarter. But across the state and in other area communities, sales-tax revenues remained flat or declined. Statewide, December's sales-tax payments to communities, which were posted in February, fell by 3.5 percent compared with December 2001. December's numbers are key because they reflect holiday spending. The first quarter's receipts include sales in October, November and December. "We're not loosening the checkbook yet, but it's good news," Southlake Finance Director Sharen Elam said. In Southlake, sales-tax revenues rose 3.1 percent to \$907,364 in December 2002 from \$879,722 in 2001. City officials projected losses of \$500,000 during the current fiscal year, so even a small increase is good news. The City Council is scheduled to revise the budget in the spring, and any increase in sales taxes could be devoted to road improvements and other capital projects that have been delayed. Grapevine collected \$2.02 million in sales-tax revenues, up from \$1.74 million in December 2001 and \$1.81 million in 2000, according to the Texas comptroller's office.

Several new restaurants in Southlake and retailers such as Neiman Marcus, Casual Corner and Best Buy in Grapevine helped boost the two cities' sales-tax revenues. "We are on our way back," Grapevine Mayor William D. Tate said. "There are definitely some bright spots in Grapevine, but whether we can hold on to that increase is the question."

The growth is not enough to get excited about yet, said Patrick Fortner, spokesman for the state comptroller's office. "I wouldn't say it is statistically important yet," he said. "Any increase is good, but overall, it is statistically flat growth, which is what we have been seeing across the country."

The increases could be enough to offset some negative financial factors, such as the possibility of war in Iraq. Grapevine also had budgeted for five months of revenues from a new Wal-Mart, which is expected to open in November. "It's very good to see," Grapevine City Manager Roger Nelson said. "What we are doing this year is what, prior to Sept. 11, we thought we would do last year. It is coming back. But it is only three months out of 12."

In Hurst, sales-tax revenues are down slightly for the quarter, dropping to \$1.99 million from \$2.04 million in December 2001, according to the state comptroller's office. "Consumers are hunkering down and are not spending quite as much," Hurst City Manager Allan Weegar said. "If the trends continue, there could be a deficit. It's a concern to us because we are so heavily reliant on sales tax." Because sales-tax revenues could continue to drop, Weegar said, Hurst is not going ahead with buying some budgeted capital items, including computers, vehicles and

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**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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equipment. City officials are also holding off on hiring employees for new and vacant positions, but no filled positions are being cut.

Other communities, such as Bedford, Colleyville and Fort Worth, also posted lower revenues than last year. North Richland Hills' sales-tax revenues dipped to \$1.44 million compared with \$1.63 million in December 2001. But the budget is conservative enough that the city should be able to weather the decline, said **Karen Bostic**, North Richland Hills' managing director. "We were down, but I think we were conservative enough that we are OK," she said. "If we have a couple of months as bad as December, we would definitely have to take action. But I anticipate sales will pick up."

**Sales-tax receipts**

Sales-tax revenue from the current fiscal year's first quarter, reflecting receipts from October, November and December. Dec. 2002/01 Jan. 2003/02 Feb. 2003/02

Arlington \$2.77m/\$4.75m \$2.65m/\$4.14m \$4.31m/ \$6.04m  
Bedford \$607,491/\$659,289 \$569,279/\$602,620 \$912,485/\$1.09m  
Colleyville \$147,784/\$161,152 \$128,774/\$147,801 \$261,234/\$306,508  
Euless \$657,594/\$590,823 \$520,481/\$514,571 \$828,766/\$866,775  
Flower Mound \$272,751/\$253,970 \$225,120/\$204,133 \$372,916/\$353,327  
Fort Worth \$5.08m/\$5.10m \$5.10m/\$5.30m \$8.44m/\$8.73m  
Grapevine \$1.13m/\$905,223 \$1.16m/\$1.12m \$2.02m/\$1.74m  
Haltom City \$466,501/\$411,699 \$403,351/\$392,91 \$638,894/\$619,360  
Hurst \$808,165/\$767,532 \$903,717/\$931,343 \$1.99m/\$2.04m  
Keller \$258,518/\$273,457 \$250,336/\$216,527 \$425,097/\$415,992  
N. Richland Hills \$880,092/\$1.38m \$925,212/\$863,535 \$1.44m/\$1.63m  
Richland Hills \$106,802/\$167,429 \$97,321/\$125,520 \$125,965/\$122,947  
Roanoke \$155,417/\$122,751 \$158,503/\$189,295 \$182,835/\$162,275  
Southlake \$543,904/\$632,799 \$554,229/\$506,098 \$907,364/\$879,722  
Trophy Club \$57,033/\$49,038 \$55,009/\$41,562 \$60,065/\$61,368  
Watauga \$181,911/\$207,130 \$188,766/\$185,546 \$342,219/\$340,696  
Westlake \$70,882/\$83,274 \$177,040/\$82,141 \$522,235/\$93,284

m - millions

SOURCE: state comptroller's office

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
March 23, 2003

**Newcomers to Texas get sales-tax sticker shock**

Author/Byline: Gene Trainor

For many of you, New Hampshire is the place that holds the country's first presidential primary. But as a former resident of that great state, New Hampshire means majestic mountains, lots of snow and low taxes. In fact, the state has NO sales tax and NO income tax. How does New Hampshire do it? In part, because it sells wine and the harder stuff at state liquor stores. You can argue the merits of a state selling alcohol, but it sure is nice to pay only the price tag when you plunk a product down at a cash register. Merchants like it, too. Shoppers from across New England flock to New Hampshire to avoid sales taxes and to stock their liquor cabinets. The state sells its booze at bargain prices.

Of course, I had to move to Connecticut, where I paid an extra 6 percent for most products bought in that state. After that came Northeast Tarrant County, where the sales tax rate is 8.25 percent in most communities. Sure, there is no income tax in Texas, unlike in Connecticut. But that's not what crossed my mind after I collected my receipt from a sales clerk. As we newcomers get ready to file our federal income tax forms, it might be time to look at the sales tax. To an extent, we and our neighbors are responsible for the fact that we pay among the highest rates in the country.

The sales tax is the state's largest source of income. It gets a 6.25 percent cut from most purchases. Only six states have higher state sales-tax rates, according to figures from the National Taxpayers Union. Texas communities can then increase the sales tax another 2 percent, according to state law. The state has about 30 categories under which all or some communities can increase the rate. In Northeast Tarrant County, the most common additional sales taxes include: crime control (police), economic development, parks and recreation, general fund and a tax to reduce property taxes. Here's where we come in. Voters must approve the local rate increases, said Sheila Clancy, a spokeswoman for the Texas comptroller's office. The rates can last for a few years, or indefinitely.

This is not to say that we don't get benefits from the taxes. Police officers, emergency equipment, parks and general services all can come from these taxes. Our property taxes also would be a lot higher without them. In Euless, for example, a 1 percent tax approved in 1970 goes to the general fund; 0.5 percent goes to economic development, parks and the library; 0.25 percent goes to crime control; and 0.25 percent goes to lowering property taxes. The latter taxes were first approved in the 1990s, city spokeswoman Lori De La Cruz said.

In North Richland Hills, 1 percent goes to the general fund; 0.5 percent goes to parks, recreation and development; and 0.5 percent goes to crime control, said **Karen Bostic**, managing director of administrative and fiscal services for the city. In Southlake, 1 percent goes to the general fund, 0.5 percent goes to crime control and 0.5 percent goes to parks and recreation, city officials said. The 1 percent general-fund tax is a big deal. The tax is expected to generate about \$9 million for

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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North Richland Hills this year, depending on the economy, said **Bostic**. The property tax, the city's largest source of income, is expected to generate \$9.14 million.

In Grapevine, which has a 7.25 percent tax rate, the 1 percent general-fund tax contributed \$14.9 million to the city's budget last fiscal year, compared with \$16.7 million for property taxes, said Gary Livingston, city budget manager.

There is a downside to shifting to sales taxes to reduce our property taxes. Unlike property and state income taxes, sales taxes cannot be deducted from our federal income taxes. U.S. Sen. Kay Bailey Hutchison, R-Texas, has filed a bill that would allow Americans to deduct sales taxes from their federal income taxes. The bill is co-sponsored by Sen. Maria Cantwell, D-Washington, whose state also has no income tax. Who knows whether Congress will pass it?

So there you have it. For a cheapskate like me (I prefer the term frugal), it helps to know where the money is going. Of course, we could just follow New Hampshire's lead and have the state sell booze. Or perhaps, given this is Texas, maybe barbecue?

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
September 10, 2002

**N. Richland Hills keeps tax rate unchanged**

Author/Byline: John Kirsch

The city tax rate of 57 cents per \$100 of assessed property value will remain unchanged for the fiscal year starting Oct. 1.

On Monday, the City Council voted 6-0 to adopt the budget and tax rate for fiscal 2003. The tax rate is composed of two parts: 32.94 cents to operate the city and 24.06 cents to pay off debt.

City officials have described the budget as a no-frills spending plan for the next fiscal year. The general fund, which pays for the city's daily operations, will be \$31.4 million, up from \$30.5 million. The total budget is \$79.7 million, up from \$75.3 million, said **Karen Bostic**, managing director of administrative and fiscal services. Reflecting security concerns since Sept. 11, the budget includes \$22,500 to install video cameras and metal detectors at the Municipal Court. City hiring has been frozen, and travel for city employees has been reduced.

**WHAT IT MEANS TO YOU**

With a tax rate of 57 cents per \$100 of assessed property value, the tax bill for the owner of an average-priced house with no exemptions would be \$684, up from \$618. The average value of a house in North Richland Hills is \$119,981, compared with \$108,341 last year.

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
August 26, 2002

**New attraction to surface at NRH20**

Author/Byline: John Kirsch

Family Water Park is planning a major addition to its list of attractions -- a \$2.5 million "treehouse" with slides, water cannons and other features designed to appeal to the whole family. Park manager Chris Swartz said the treehouse, scheduled to debut at the start of the 2004 season, is still being designed. It will be near the children's area, on the northeast side of the park. "The nice thing about the treehouse is that Mom and Dad can have as much fun ... as their kids," he said.

Water parks nationwide are adding the multilevel attractions, which resemble backyard treehouses, said Dave Bruschi, executive vice president of the World Waterpark Association in Lenexa, Kan. The attractions can draw more visitors and boost revenue, he said. They typically have water slides, bridges and water cannons. The largest ones have huge buckets that gradually pour 1,000 gallons of water on people frolicking below.

The NRH20 treehouse will cost \$2.5 million, the same as the Green Extreme, one of the park's most popular attractions, said **Karen Bostic**, managing director of administrative and fiscal services for North Richland Hills, which owns the park. Of that, \$2.25 million will be financed through certificates of obligation, or debt, issued by the city.

The rest will be drawn from NRH20's reserves, City Financial Director Larry Koonce said. Paying off the debt over 20 years will cost the city \$3.5 million. But officials hope to recoup that and more through increased park attendance, Koonce said. Other area water parks already have such treehouses.

Hook's Lagoon is one of the most popular attractions at Six Flags Hurricane Harbor in Arlington, publicity coordinator Melissa Pinkerton said. Competition with the Six Flags park is not a concern for NRH20 because it is marketed as a family attraction while Hurricane Harbor is aimed more at teens, said Anne Richardson, NRH20 marketing specialist.

Chisholm Aquatic Center in Hurst has a treehouse with water guns and slides, Deputy City Manager Allan Heindel said. But the facility was intended to fill a niche as a community aquatic center, not to compete with NRH20, Heindel said.

Fort Worth Star-Telegram (TX)  
August 10, 2002

**3 cities may raise senior tax breaks**

Author/Byline: Ellen Schroeder; Staff writer Jessamy Brown contributed to this report.

Senior citizens in Euless, Haltom City and North Richland Hills may get larger property tax breaks this year. On Monday, the Haltom City council will discuss increasing the property tax exemption for people 65 and older to \$50,000 from \$40,000. The Euless City Council is scheduled to vote Tuesday on a \$5,000 increase to \$35,000. On Sept. 9, the North Richland Hills City Council will consider raising the exemption to \$36,000 from \$35,000. For North Richland Hills residents, the tax savings would be about \$205 a year, a \$6 increase from this fiscal year, if the home value is the same. In Euless, the \$35,000 exemption would save seniors \$174, an increase of \$24.86, said Loretta Getchell, director of fiscal and administrative services.

Figures for Haltom City were unavailable because staff members are working on the budget, Finance Director Pat Elfrink said. Mayor Calvin White requested that the City Council consider the higher exemption. "Seniors are really concerned about this because they don't have time to recover from a downturn in the market," White said.

Several council members said they do not want to act until they have seen a preliminary budget. The first public peek at the budget is scheduled for Aug. 23-24. "I don't have anything to base this on," Councilman John Williams said. "You don't start giving away money until you know what's coming in."

Councilman David Averitt said he favors increasing the exemption, depending on how it would affect the city's finances. "The average senior I've talked to, that hasn't been the highest priority. Some have said, 'Save the money and fix the streets,' " Averitt said. "Increasing it by another \$10,000 is not going to make that big a difference to the average senior citizen, just a few dollars a year. But anything they can save, I'm definitely in favor of that."

In Euless, 1,407 residents have applied for senior tax exemptions. The increased exemption would cost the city \$244,873, about \$35,000 more than this fiscal year. Getchell said tax bills could still increase, even with the extra exemption, depending on how much home values increase. Council members said the increase will probably be approved. "I believe everyone's for it," Mayor Pro Tem Carl Tyson said.

In North Richland Hills, granting exemptions to the 2,600 applicants would cost the city about \$521,000, \$15,000 more than last year. "We have managed the budget in such a way we can absorb it," said **Karen Bostic**, managing director of administrative and fiscal services. "We have had a lot of seniors interested in getting the tax reduced because property values have been increasing."

Budget crunches are keeping some communities from granting bigger tax breaks. In Richland Hills, where about a third of the 3,100 households qualify for the \$20,000 exemption, officials



**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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are not considering an increase, City Manager James Quin said. Officials are concentrating on replacing about \$500,000 in annual sales tax revenue lost when Sam's Club closed on Baker Boulevard in 2000. The senior exemption costs the city about \$64,670 in annual property tax revenue, Quin said. "They would have to consider cutting services or people to offset the loss in revenue. Right now, \$64,000 is equivalent to a 5 percent tax increase or a corresponding cut in personnel or operating expenses," Quin said.

Lightening the load

Current senior-citizen tax exemptions:

- \* Bedford: \$50,000
- \* Colleyville: \$45,000
- \* Euless: \$30,000
- \* Grapevine: \$60,000
- \* Haltom City: \$40,000
- \* Hurst: \$35,000
- \* Keller: \$40,000
- \* North Richland Hills: \$35,000
- \* Richland Hills: \$20,000
- \* Southlake: \$75,000
- \* Watauga: \$30,000

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Fort Worth Star-Telegram (TX)  
November 8, 2001

**Cities still registering sales tax gains**

Author/Byline: Gordon Dickson; Staff writers Ellena Fortner Morrison, John Kirsch, and Ellen Schroeder and correspondent Brenda Edwards contributed to this report.

Retail sales were surprisingly strong in September in Northeast Tarrant County, where communities had prepared for the worst after the Sept. 11 terrorist attacks temporarily brought cash registers to a standstill. Several cities, including Bedford, Keller, Southlake and Watauga, saw marked increases in sales tax revenue, according to figures released Wednesday by the Texas comptroller's office. Sales tax revenue in Tarrant County increased 2.7 percent in September compared with the same month a year ago. Year to date, municipalities in Tarrant County have received about \$252 million, up nearly 6 percent. Statewide, sales tax revenue increased 3.7 percent in September and 5.2 percent year to date. Some Northeast Tarrant communities felt the effects of a battered economy more than others.

Grapevine, which has experienced nearly nonstop double-digit growth for a decade, saw a 6.7 percent decline in sales tax revenue in September. But the city is way ahead of last year's record sales tax receipts, with \$14.9 million collected so far. That is a 13 percent increase from 2000. Still, Grapevine will postpone major cash purchases and nonessential expenses until the state of the economy becomes clearer, City Manager Roger Nelson said. "It's a little early," he said. "We've had only one month of reporting since the attacks. While we came out a lot better than we had prepared to be, we still don't know." Grapevine officials said they are unsure how much of the decline was caused by lost sales at Dallas/Fort Worth Airport, which was shut down for more than two days after the Sept. 11 attacks. Grapevine receives sales tax proceeds from D/FW because its terminals are in the city limits.

In Southlake, where sales tax proceeds make up 28 percent of the city budget, revenue is up 26 percent for the year and 16 percent in September. Officials say the increase comes from the continued boom in retail development, which includes new outlets such as The Container Store and Costco.

In Bedford, Administrative Services Director Beverly Queen said she is pleased by a 12 percent increase in sales tax revenue, but she declined to speculate on the reasons for the jump. The increase will not cause a spending spree because the City Council has already adopted the budget, she said.

Keller's sales tax revenue increased 22 percent, and Watauga's increased 17 percent in September. Watauga Finance Director Janina Jewell said the increase is not surprising. "For the last 14 years, our November receipts have been the highest for the calendar year," she said. September receipts of \$296,770 were 17 percent higher than the \$254,187 collected in September 2000. City revenue is up 43 percent for the year to \$2.4 million. "We did experience that 17 percent increase due mainly to the development along the [U.S.] 377 corridor," Jewell

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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said. A SuperTarget recently opened at Watauga Towne Crossing, joining about 30 other tenants on 42 acres.

In North Richland Hills, lower sales tax receipts for September are not a surprise to **Karen Bostic**, director of budget and research. "It was actually a better number than I had anticipated because of the terrorist attacks," she said. "Especially for the first several days after Sept. 11, people were not out at the shopping malls. That definitely had an impact on the number." **Bostic** said she had expected flat sales tax revenue for the fiscal year, so the lower figure will not have a major effect.

In Euless, which collects sales tax from some parking facilities, toll gates and vendors at D/FW Airport, revenue declined 5 percent in September. "We expected to be down, and actually we were quite pleased it was only a 5 percent decrease. Our rough calculations were as much as 10 percent," said Loretta Getchell, Euless director of fiscal and administrative services.

In Richland Hills, where sales tax revenue was down 15 percent in September, city officials blamed some of the decline on the loss of Sam's Club, which was the largest single tax source. Year to date, revenues are down 25 percent, or about \$567,000. "We prepared for it budgetary wise and reduced expenditures," City Manager Jim Quin said. "So far, the plan is working. It doesn't mean employees aren't working more with less, but we are working hard at marketing the city." With a new gas station moving in, Handley Ederville Road construction beginning and more houses being built, city officials hope to climb out of the red in a year. "We are going to be patient and try to market the city in a way that brings in quality development," Quin said. "I feel confident it will come soon."

Hurst, which had braced for the worst after Sept. 11 because it depends on sales tax, saw increases in sales tax revenue, of 4.8 percent in September and 17.6 percent for the year. The increases will bring in an extra \$1.8 million this year compared with 2000. City officials have credited the expansion of North East Mall, where several new stores, including Nordstrom and Foley's, have opened in recent months. They also cite the addition of The Shops at North East Mall.

Other cities that had an increase in sales tax revenue in September included Colleyville (0.75 percent) and Haslet (37 percent). Communities that experienced a decrease included Haltom City (4 percent) and Westlake (49 percent).

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Dallas Morning News, The (TX)  
August 24, 2001

**City plans to maintain tax rate, expand services With values rising, most homeowners would have higher bills**

Author/Byline: Jaime Jordan

A desire to increase services and a projection that sales taxes won't increase are spurring North Richland Hills to keep the tax rate at 57 cents. The city will have a public hearing on the proposal at 7 p.m. Monday in the council chambers, 7301 N.E. Loop 820 in North Richland Hills. Even though the city isn't raising the 57 cents per \$100 of valuation tax rate, which has been in place for nine consecutive years, many homeowners are likely to see an increase in their property tax bills, said **Karen Bostic**, North Richland Hills director of budget and research.

The average homeowner's taxes are expected to increase by about \$40.90, or 8.45 percent, compared with last year's taxes, she said. The increase would occur because many homes' tax valuations went up, she said. The city gained \$109 million in new construction revenue, along with the increase in home values, but the city also is projecting a flat sales tax return in 2002, she said.

The city could lower its tax rate to 53 cents and generate the same amount of revenue it generated last year, **Ms. Bostic** said. However, the city staff is recommending maintaining the 57-cent tax rate because of the city's need for services. "We have expanded programs, and just the continued demand for additional and improved services," she said. "At this point in time it was not feasible to decrease the tax rate because the economy's pretty flat right now. We can't depend on the sales tax to help us next year."

The city expects to generate about \$8.6 million in sales tax revenue next year, the same as the city projected in the budget for the current year, she said. "Our biggest challenge for the proposed budget is the fact that our sales tax is very weak," **Ms. Bostic** said. She said other possible hurdles are the slowing economy and construction on Rufe Snow Drive.

Council member Joe Tolbert agreed it would not be financially feasible to lower the city's tax rate. "Obviously, you go into public hearings not with your mind made up but listening to people," Mr. Tolbert said. "What they presented to us is a good, solid budget. What you have to remember about a city that's growing like us, we've got to keep funding the infrastructure for continued future growth. If we can do that and maintain the same tax rate, that's fantastic."

The new budget also sets aside \$50,000 for architectural and construction fees for the expansion of Dan Echols Senior Center, Mr. Tolbert said. "They're bursting at the seams," he said. "That's part of what I'm talking about with the growth." The proposed budget and tax rate will be voted on at the Sept. 10 council meeting, **Ms. Bostic** said.

Fort Worth Star-Telegram (TX)  
April 29, 2001

**QUESTIONS ARE RAISED ABOUT ANTI-CRIME TAXES SOME CITIES SHIFT MONEY ONCE USED FOR POLICE**

Author/Byline: Ben Tinsley and Steve Stein; Staff writer Ellena Fortner contributed to this report.

Year after year, communities in Northeast Tarrant County have touted the benefits of crime control sales taxes to area voters. More police officers, better equipment and reduced response times were among the carrots that were dangled as voters went to the polls. The tax was meant to supplement money that was already being spent. For the most part, community leaders have followed through on their promises. But as revenue from the taxes pours in, some communities are shifting money in the general fund that was once spent on police to other departments. The shift in the general fund, which pays for most municipal services, raises questions about whether the tax is paying for more than police protection. "If money that would usually go to the police is being transferred to other areas, I would be in favor of looking into the idea of lowering the crime tax and giving the citizens a tax break," Hurst Councilman Richard Ward said. "I promise to look into this."

The questions come as voters in North Richland Hills and Watauga prepare to go to the polls Saturday to decide whether to renew half-cent crime control sales taxes. In North Richland Hills, the amount of general fund revenue that goes to the Police Department decreased to 27 percent this fiscal year from about 31 percent before the tax took effect in July 1996. Police vehicles that were covered by the general fund are now paid for through sales tax revenue at a cost of \$346,000. In Watauga, the amount of general fund money that goes to the Department of Public Safety, which also includes firefighters and emergency medical workers, declined to 31 percent this fiscal year from 37 percent in fiscal 1995-1996, before the tax took effect. Hurst voters approved a five-year half-cent tax in 1995 and renewed it for 10 years last year. During fiscal 1993-1994, about 34 percent of the general fund went to police. This fiscal year, the figure is 31 percent. In Colleyville, where a half-cent sales tax took effect in 1999, the amount of general fund money that goes to the Police Department decreased to 22 percent this fiscal year from 24 percent in fiscal 1998. Police Chief John M. Young said the difference is probably being disbursed to other departments. "I think that was the way it was spread out over the general fund," he said.

Hurst Police Chief Tim Wallace said, "The entire city is making use of that. It's given to the other departments, I am sure - salary benefits, capital, whatever they need it for." **Karen Bostic**, budget and research director for North Richland Hills, agreed. "There is no way to tell you specifically where the money would have gone," she said. "It would have gone to fund all other programs in the general fund."

Some municipal officials defend the practice. Without the shift, needed services would have to be eliminated, or property tax rates would have to increase, they say. "Although not the exclusive reason, it is safe to say that it has been much easier for the city of Watauga to reduce its tax rate

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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each of the last five years as a result of the crime control district sales tax proceeds," City Manager Dale Cheatham said. Some communities have been careful not to shift money. Euless officials said about 34 percent of the general fund still goes to police, as it did before a quarter-cent crime control sales tax was approved in 1995. "Our decision was to limit the number of personnel paid for out of this fund if voters for some reason chose not to renew it," Deputy City Manager Gary McKamie said. In Haltom City, the amount of general fund revenue that goes to police increased to 39 percent in fiscal 2000-2001 from 37 percent in fiscal 1994-1995, when the crime tax was not in effect, interim City Manager Patrick Elfrink said.

In March 1995, Fort Worth became the first community in Texas to approve a crime control sales tax after the state Legislature allowed such elections. Fifty-nine percent of voters approved the sales tax, which stunned some experts because the proposal had been divisive. Opponents were concerned that the city would use the revenue in a shell game that sent funds to programs unrelated to crime control. The idea swept across Northeast Tarrant County. Voters in Euless, Haltom City and Hurst overwhelmingly approved crime control sales taxes in 1995. North Richland Hills and Watauga followed in 1996. Southlake approved a tax the next year. Colleyville joined the group in 1999.

The bandwagon stopped in Keller. In March 1999, voters defeated a half-cent sales tax increase for crime control by a 3-to-1 ratio. Some observers said residents questioned the amount of money proposed for the school program Drug Abuse Resistance Education and doubted whether it was effective. Even if some money might have been shifted in North Richland Hills, the \$17.8 million generated by the sales tax since 1996 has increased the money available for police protection, according to city figures. Eighteen patrol officers, three school resource officers and five civilian officers were hired largely because of the tax. Losing the tax would be damaging, officials say.

"It would not be good," said **Bostic**, the city budget and research director. "We have not sat down at this point to honestly see what would happen. We would have to consider how to reallocate revenues, come up with a way to cover expenditures."

So voters will go to the polls with questions to ponder, said Allan Saxe, a political science professor at the University of Texas at Arlington. "On the purely superficial level, you have to hope the money goes where it's earmarked to go," he said. "It's a matter of public trust. But this seems to be more open-ended than other earmarked proposals. "It's a hard question."

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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Dallas Morning News, The (TX)  
April 2, 2000

**Tax-free holiday welcomed - Area cities agree to 2nd annual sales-tax holiday**

Author/Byline: Jennifer Packer; Staff writers Kendall Anderson, Tiara M. Ellis, Lee Graham and Lee Powell contributed to this report.

For the second consecutive year, back-to-school shoppers who frequent northeast Tarrant retail stores will be able to take a three-day vacation from sales taxes this summer. As of Friday - the deadline for cities to give notice if they planned to opt out of the tax-free holiday - municipalities across the area had given the thumbs-up to the annual state exemption. The shopping holiday was mandatory last year, when it was first approved by the state Legislature.

During the first weekend of August, consumers will not have to pay city or state sales tax on clothing and footwear priced less than \$100. Shoppers across the state spent \$400 million on exempted merchandise that weekend in 1999, saving \$32.6 million on the state's 6.25 percent sales tax and as much as 2 percent on city sales tax.

Officials in several northeast Tarrant cities said the good will generated by the tax break is worth the revenue losses, at least for now. "While the economy is going very well and sales are growing, and everything is looking very rosy, we will participate in it," Hurst City Manager Allan Weegar said. Hurst, home to North East Mall, took perhaps the area's greatest loss in sales tax revenues during the tax-free holiday last year - \$74,000. The mall generates 70 percent of the city's sales tax.

North Richland Hills logged sales tax losses of roughly \$33,000 during that weekend but reported an almost 7 percent overall gain in sales tax revenue for the month of August, said the city's budget and research director, **Karen Bostic**. "People's perception is that 'we're getting a great deal,' so they end up paying more than they normally would," she said.

Unlike most area cities, which agreed to participate by not putting the item up for a City Council vote, the North Richland Hills council considered the item briefly during a meeting last week. The vote to participate was unanimous. "It's an issue worthy of consideration," North Richland Hills Assistant City Manager Steve Norwood said. "Rather than us making an assumption, we thought, let's put it before the public."

The decision was easier for much smaller cities, such as Roanoke, population 3,000, which derives little revenue from retail shopping. "We just don't have many clothing vendors, apart from a resale shop," Roanoke City Manager Jimmy Stathatos said. Euless lost about \$5,000 in sales tax, city officials said. In tiny Westlake, home to about 200 people, city officials haven't discussed the matter and will participate in the sales tax holiday by default.

Colleyville City Manager Bob Stripling said his council discussed the issue last year and decided that opting out of the tax holiday would hurt local merchants by driving consumers to neighboring cities that offer the buying incentive. Officials in several other cities echoed a

**Internet – Newspaper Archives Searches**  
**Karen R. Manila**  
*(Articles are in reverse chronological order)*

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similar rationale. "When all the other cities in Texas are observing the holiday, I think it's appropriate for us to go along with it," Hurst City Council member Anna Holzer said. Added Keller City Manager Lyle Drescher, "We have little choice but to recognize the holiday."

At North East Mall, Stride Rite Bootery manager Bill Craig reacted with a mix of jubilation and alarm at news that Hurst would again participate in the holiday. During the tax-free weekend last year, he was working at the company's store in The Parks at Arlington. "If you'd have been a merchant during that time, you went home frazzled and blitzed," said Mr. Craig, recalling the frenzy of activity that netted the Arlington store three days of record-breaking sales. "But in the end, when you get a chance to replenish your brain cells, you look back and say, "Wow, that was a lot of sales.' "

The Burlington Coat Factory store in Grapevine Mills mall is already planning to increase the number of clerks working during that weekend, store manager Steve Bitting said. The extra 30 employees on hand last year weren't enough, he said.

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Research Compiled by:      Lynelle Klein  
                                         Colin Baenziger & Associates



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## **Appendix D**

### ***St. Johns County, FL Resolution Thanking CB&A for Its Outstanding Service***

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**RESOLUTION NO. 2007-23/**

**A RESOLUTION OF THE COUNTY COMMISSION  
OF ST. JOHNS COUNTY, FLORIDA, THANKING  
COLIN BAENZIGER & ASSOCIATES FOR ITS  
OUTSTANDING EFFORTS IN CONDUCTING THE  
EXECUTIVE SEARCH FOR THE COUNTY'S NEW  
ADMINISTRATOR; AND PROVIDING AN  
EFFECTIVE DATE.**

**WHEREAS**, St. Johns County retained Colin Baenziger & Associates (CB&A) to identify and recommend strong candidates to be the County Administrator;

**WHEREAS**, CB&A's staff worked diligently to find and produce excellent candidates, and then provided the County Commission with comprehensive materials concerning the candidates' aptitude, experience, background, complete and thorough interviews, references, extensive checks of criminal, civil and financial history, verification of employment and education, and exhaustive reviews of Internet and newspaper archives of these candidates; and

**WHEREAS**, CB&A's process was completely open, fair and unbiased and was extremely well received by the County Commission, county staff, the press, and the public; and

**WHEREAS**, the County Commission wishes to express its gratitude to Colin Baenziger & Associates for its efforts on behalf of the county;

**NOW BE IT THEREFORE RESOLVED BY THE COUNTY COMMISSION OF  
ST. JOHNS COUNTY, FLORIDA AS FOLLOWS:**

**Section 1: Recitals.** The preceding recitals are true and correct and are incorporated herein by this reference.

**Section 2: Acknowledgement.** The County Commission wishes to express its sincere appreciation and gratitude to Colin Baenziger & Associates for its outstanding work and effort in assisting the county in finding its County Administrator.

**Section 3: Effective Date.** This resolution shall take effect immediately upon adoption.

**PASSED AND ADOPTED** by the Board of County Commissioners of St. Johns County, Florida, this 21 day of August, 2007.

**ATTEST:** Cheryl Strickland, Clerk

**BOARD OF COUNTY COMMISSIONERS  
ST. JOHNS COUNTY, FLORIDA**

By: Pam Halpin  
Deputy Clerk

By: Ben Rich  
Ben Rich, Chairman

Rendition Date: 8/23/07

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## **Appendix E**

### ***Comments from Dale Martin on CB&A's Vetting Process***

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# Fernandina Observer™

A JOURNAL OF NEWS AND OPINION

## Weekly comments from Dale Martin

By Dale Martin, City Manager, City of Fernandina Beach  
*March 18, 2016 1:00 a.m.*

The vetting process employed by Mr. Colin Baenziger following my application to the City of Fernandina Beach was the most thorough review of my career, credentials, and references that I have ever experienced. In the months leading to my appointment here, I was interviewed in several other communities for similar City Manager positions. Despite getting to the interview stage in those communities, none of my references ever indicated to me that they had been contacted. As part of the selection process here, I was required to provide an exhaustive list of references, some very specific, such as my current Town Attorney, auditor, Chamber of Commerce, etc. To the best of my knowledge, every single reference provided was contacted.

The historic information provided to the City Commission for each candidate was extensive. Reading through the older newspaper articles rekindled so many memories- the personalities and issues from earlier days illustrate some peaks and valleys over the past twenty years. It has been a wonderful ride.

Note: Mr. Martin reminisces about his career for the remainder of the article. The full article can be found at:

<http://fernandinaobserver.com/2016/03/18/weekly-comments-from-dale-martin-5/#more-65218>