



City of Palm Coast
Agenda
Council Special Business
Meeting

City Hall
160 Lake Avenue
Palm Coast, FL 32164
www.palmcoastgov.com

Mayor Milissa Holland
Vice Mayor Nick Klufas
Council Member Eddie Branquinho
Council Member Robert G. Cuff
Council Member Jack D. Howell, II

Friday, March 8, 2019

9:00 AM

CITY HALL

City Staff

Beau Falgout, Interim City Manager

William Reischmann, City Attorney

Virginia A. Smith, City Clerk

> Public Participation shall be in accordance with Section 286.0114 Florida Statutes.

> Other matters of concern may be discussed as determined by City Council.

> If you wish to obtain more information regarding the City Council's agenda, please contact the City Clerk's Office at 386-986-3713.

> In accordance with the Americans with Disabilities Act, persons needing assistance to participate in any of these proceedings should contact the City Clerk at 386-986-3713, at least 48 hours prior to the meeting.

> City Council Meetings are streamed live on YouTube at <https://www.youtube.com/user/PalmCoastGovTV/live>.

> All pagers and cell phones are to remain OFF while City Council is in session.

A. CALL TO ORDER

B. PLEDGE OF ALLEGIANCE TO THE FLAG

C. ROLL CALL

D. INTERVIEWS OF CANDIDATES FOR CITY MANAGER

1. INTERVIEWS FOR CITY MANAGER

E. PUBLIC PARTICIPATION

Remainder of Public Comments is limited to three (3) minutes each.

F. ADJOURNMENT

City of Palm Coast, Florida Agenda Item

Agenda Date : 03/08/2019

Department	CITY CLERK	Amount
Item Key	6172	Account
		#
Subject	INTERVIEWS FOR CITY MANAGER	
Background :	<p>City Council will be interviewing the following candidates for the City Manager position. Each candidate will have an interview lasting no longer than 90 minutes. The order of the candidates does not reflect any rating of the candidates, however to accommodate travel schedules those located furthest away will be interviewed in the morning session.</p> <ol style="list-style-type: none">1. Mr. Matthew Morton2. Mr. Doug Kewley3. Ms. Robin Hayes4. Mr. Beau Falgout	

CONFIDENTIAL INFORMATION

FINALIST CANDIDATE REVIEW

This briefing book has been prepared for the exclusive use of the City of Palm Coast.

All contents herein are proprietary information owned by SGR and any release of names or other information contained herein can reasonably be predicted to cause damage to the persons contained herein.

No names, or other information contained herein, may be released or revealed in any way without the approval of SGR.





February 28, 2019

CONFIDENTIAL AND PROPRIETARY

Honorable Mayor Holland and City Council Members
160 Lake Avenue
Palm Coast, Florida 32164

Dear Mayor Holland and Council Members:

I am pleased to provide you this confidential briefing book on the finalist candidates to become the City of Palm Coast's next City Manager.

Behind each tab are the following documents: cover letter, resume, completed questionnaire, first year game plan, and DiSC Management Profile. The comprehensive media reports are being provided to you separately via the enclosed flash drive(s). Behind this letter, but in front of the tabs, are several documents to assist in your deliberations: Forced Ranking Form, DiSC Team View Report, Overview of DiSC Styles, Navigating the Legal Aspects of Interview Questions, and the ICMA Model Agreement.

The Overview of DiSC Styles is a three-page sample summary that will allow you to better interpret the candidates' DiSC assessment results. The Team View Report is derived from the DiSC Management Profiles and provides the management type of each of the candidates so that you can easily compare them side-by-side. The Team View Report displays the candidate's management preference in a circle view, which is represented by a black dot in the circle. The closer the dot is to the edge of the circle, the stronger the candidate leans toward a particular style. You can also determine the strength of the preference by looking at the colors represented.

The ICMA Model Agreement has been provided in this briefing book because this will be the framework of reference that most city managers will bring to contract discussions. There is nothing that requires or mandates that any of the provisions in this document be in the final agreement. However, I wanted to give you an opportunity to be familiar with the document prior to the time that you enter into employee agreement discussions with a given finalist.

I hope this proves helpful as you prepare for the upcoming interviews. Please feel free to call me at any time if you have questions.

Respectfully submitted,

Douglas Thomas
Senior Vice President, SGR
DouglasThomas@GovernmentResource.com
Cell: 863-860-9314

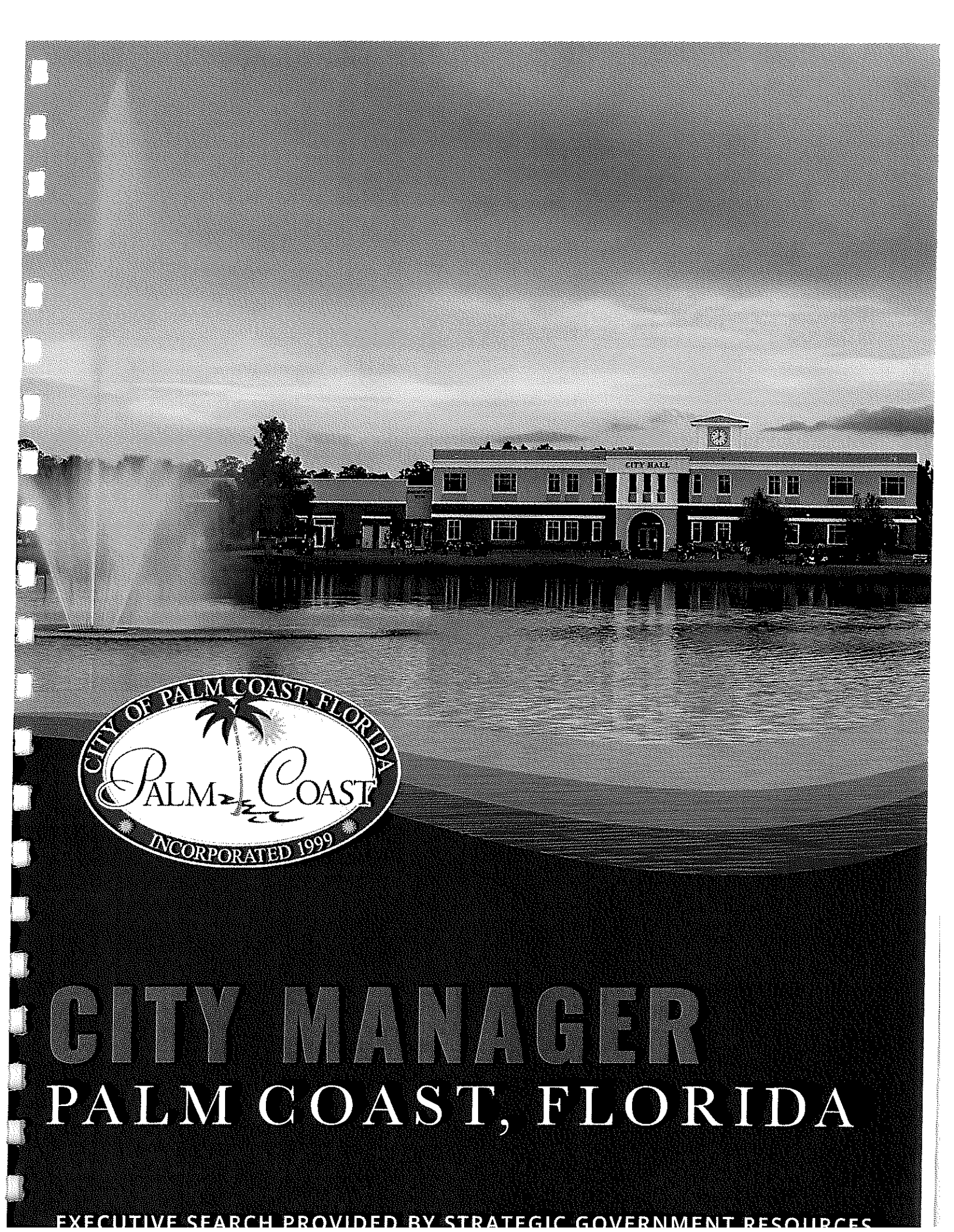
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- III. Synopsis of Candidate Assessments**
 - a. DiSC Team View Report
 - b. Overview of DiSC Styles
- IV. Navigating the Legal Aspects of Interview Questions**
- V. ICMA Model Agreement**
- VI. Finalist Candidate Reviews**

Behind each Tab: Cover Letter, Resume, Completed Questionnaire, First Year Game Plan, and DiSC Management Profile
(Media Reports provided on flash drive)

 - Tab 1: Beau Falgout
 - Tab 2: Donald Kewley
 - Tab 3: Matthew Morton
 - Tab 4: Robin Hayes



CITY MANAGER

PALM COAST, FLORIDA

EXECUTIVE SEARCH PROVIDED BY STRATEGIC GOVERNMENT RESOURCES



THE COMMUNITY

Boasting beautiful natural vistas and endless recreational opportunities, the City of Palm Coast, Florida, is situated on 96 square miles along saltwater and freshwater canals and the Intracoastal Waterway, just minutes from pristine Atlantic Ocean beaches. The growing, dynamic community of 86,516 is located in Flagler County, with Interstate 95 running through the City and intersecting with Interstate 4, providing convenient connectivity with Daytona Beach and Tampa.

One of Florida's newest cities, Palm Coast was incorporated in 1999 and offers a vibrant lifestyle in a scenic natural environment. The City was originally developed by ITT Community Development Corporation beginning in the 1970s. It was marketed as a retirement community in the early years but is now home to many families and people of all ages. Palm Coast was one of the fastest-growing cities in the United States in the early 2000s and growth is expected to continue.

The City has a dozen beautiful parks, 125+ miles of connecting trails and paths for walking/bicycling, abundant fishing and boating, world-class tennis and golf, birding along Great Florida Birding & Wildlife Trails, and recreational programming for residents and visitors of all ages. The Indian Trails Sports Complex hosts soccer, lacrosse, baseball, and other athletic tournaments for teams throughout the Southeast. Special events include the Arbor Day celebration, the Birds of a Feather Fest, the Intracoastal Waterway Cleanup, Movies in the Park, Food Truck Tuesdays, the Palm Coast & the Flagler Beaches Senior Games, the Starlight Event & Parade, and much more.

Flagler County Schools, Florida Hospital Flagler, Palm Coast Data, Publix Supermarkets, and Hammock Beach Resort are the area's major employers. High profile major development projects underway or recently completed include: Shoppes of Palm Coast (Tractor Supply, Aldi, Starbucks, and Taco Bell), Island Walk Shopping Center (Hobby Lobby, Tuesday Morning, Publix, IHOP, etc.), FPL Category 5-rated Service Center, Florida Hospital Flagler major expansion, Creekside at Grand Haven (residential), Moonrise Brewery, Grand Landings Phase 3 (residential), and Matanzas Lake subdivision (residential).

Flagler County Public Schools serves approximately 13,000 K-12 students in Palm Coast. The district consists of nine campuses, including five elementary, two middle schools, two high schools, one virtual school, and two charter schools. Flagler Schools leverages a full-range of technology and digital resources for students and has partnered with the community to bring Flagship Choice Programs to all of its schools, allowing students to explore careers from the earliest grade levels. Students can explore and grow in the worlds of agriculture, aerospace, green technology, health science, engineering and computer science, marine research, finance and business, leadership, the arts, and more. Currently there are 22 Flagship Programs spanning grades K-12 that provide an enriched education infused with the essentials for college and career readiness. All schools offer a variety of extracurricular activities and clubs.

THE COMMUNITY

CONTINUED

For those seeking higher education, Daytona State College has a campus in Palm Coast (Flagler/Palm Coast Campus). Regionally, colleges and universities include: Embry-Riddle Aeronautical University and Bethune-Cookman University in Daytona Beach; Stetson University in DeLand; the University of Central Florida in Orlando (with a campus in Daytona Beach); Flagler College and the University of St. Augustine for Health Sciences in St. Augustine; University of North Florida in Jacksonville; and the Florida Coastal School of Law in Jacksonville.

The City has a median household income of \$49,207 and an average home value of \$211,100.

GOVERNANCE AND ORGANIZATION

MISSION

To provide our residents, visitors, and business community with exceptional government services in order to improve the quality of life, grow the local economy, and protect the natural environment through a planned integrative approach using available technology.

VISION

A multigenerational community recognized as one of Florida's premier cities that values...

Building a diverse, sustainable economic base to support innovation while providing necessary infrastructure and services

Providing exceptional amenities and standards that support a high-quality lifestyle

Protecting the environment and beauty of Palm Coast while conserving natural resources.

VALUES

Pride - Passion in working together for a better tomorrow

Accountability - Accept responsibility for our actions and decisions

Leadership - Courage to shape our City today and into the future in a transparent manner

Motivated - Seek continuous improvement in all services

Collaborative - Dedicated to building partnerships that address community concerns and needs

Ownership - Responsible for our actions and inactions

Achievement - Seek excellence in all that we do

Stewardship - Protectors of our natural environment

Trust - Mindful of our responsibility, we pledge to use taxpayer resources (time, talent, money) efficiently

GOVERNANCE AND ORGANIZATION

CONTINUED



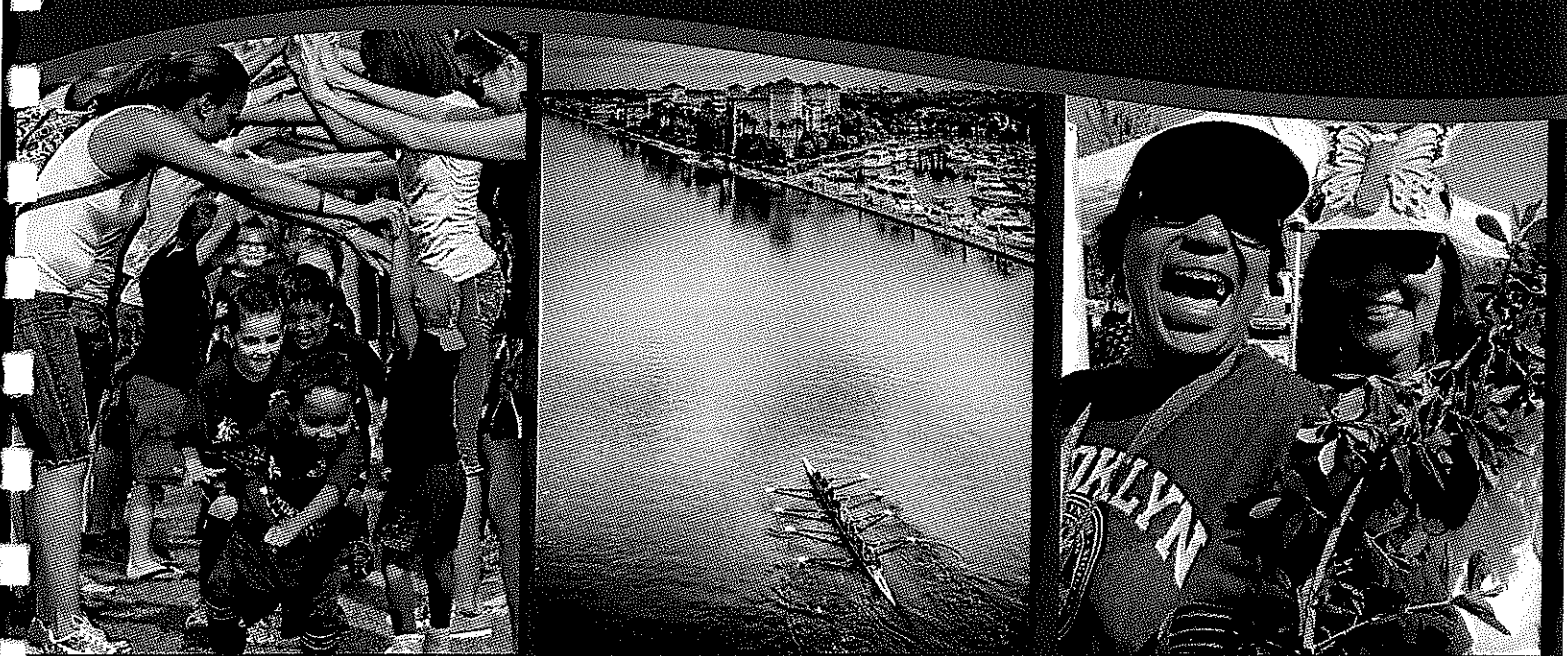
Palm Coast operates under the council-manager form of government composed of the Mayor and four City Council members who act as the political head of the City and are responsible for setting policy, approving the budget, determining the tax rate, and formulating broad long-term policies that outline the City's public function. The Mayor and Council members are elected at-large, for a term of four years and may serve no more than two consecutive four-year terms in the same seat. The City Manager is appointed by Mayor and Council and implements the policies of the Council, in addition to directing day-to-day operations, preparing the annual budget, overseeing personnel matters, recommending policies or programs to the Council, and keeping the Council fully advised of the financial and other conditions of the City.

The City provides a full-range of municipal services supported by approximately 450 full-time, 4 part-time, and 70 seasonal/temporary employees represented by unions administered under their respective collective bargaining agreements. The FY 2019 annual budget is approximately \$143.7 million, including a general fund of \$37.4 million, with an ad valorem millage rate of 4.6989.

The City Manager's direct reports include the City Clerk, Administrative Services & Economic Development Director, Finance Director, Information Technology Director, Utility Director, Fire Chief, Parks & Recreation Director, Community Development Director, Public Works Director, Human Resources Director, and Executive Assistant. Police protection is provided through an interlocal agreement with the Flagler County Sheriff's Department.

Palm Coast has a tradition of using cross functional/departmental teams to implement the City Council's targeted objectives, strategies, and goals. The use of a team approach is an effort to foster individual skills and highlight the talent that exists within the City's workforce. There are currently approximately 25 different cross functional teams working on community goals and challenges.

CHALLENGES AND OPPORTUNITIES



Public-Private Partnership (P3) for Palm Coast's "FiberNet"

Palm Coast commissioned the construction of the City's FiberNet, a high-speed fiber-optic backbone to connect all City sites and facilities in 2004. Currently, FiberNet's assets include nearly 60 route miles of conduit and 54 miles of high-count fiber cable. The City's economic development goals include the attraction of dynamic, high-paying technology jobs, bolstered by the enhancement of its advanced world-class public network. A broadband strategic plan with Magellan Advisors was recently completed to map out a public-private partnership whereby the City will focus its efforts on the expansion and maintenance of the fiber network, while its yet to be determined P3 partner focuses on lighting and operating the network for the benefit of the community. The successor City Manager will play a key role in the development of the P3 and the attainment of the City's vision for FiberNet.

Department of Public Works (DPW) Complex Replacement

The City's CIP has identified a growing need to address its aging DPW complex, at an estimated cost of \$20 million. There have been some discussions regarding the potential funding source to replace the complex, but a resolution will likely involve the development of proposed funding strategies by the next City Manager.

Economic Diversification & Business Friendly Development

One of Palm Coast's goals is to be recognized as a community that encourages development consistent with its evolving vision; this will likely require innovative strategies that will increase development investment opportunities. The next City Manager will help the City Council and community refine the future vision for Palm Coast and promote the continued transition of the community from a largely residential planned community to a more diverse, mixed-use, residential, commercial, high-tech, and high-skill business center in an effort to diversify the City's tax base.



CHALLENGES AND OPPORTUNITIES

CONTINUED

Infrastructure Improvement

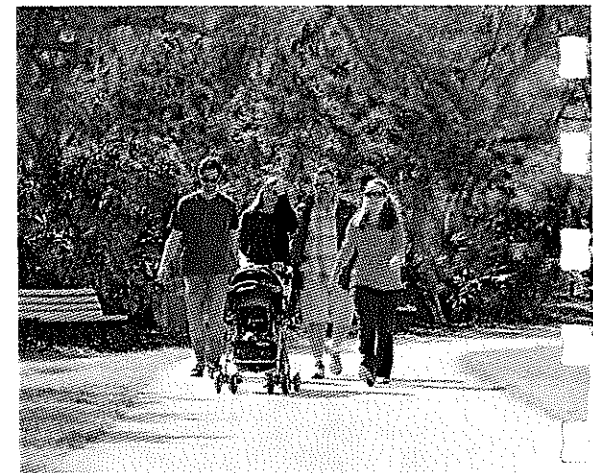
Because of Palm Coast's history as a planned community, virtually all its underground infrastructure and most of its streets were constructed around the same timeframe, resulting in a growing need for repairs and upgrades. Some steps have been taken in anticipation of the reinvestment in infrastructure through identified funding mechanisms; however additional CIP resources will need to be identified and/or re-allocated to address anticipated future capital needs.

Innovation District/Opportunity Zone

Palm Coast's Town Center area has been infrastructure-ready for several years, but its intended vision has yet to be fully realized. The City and Community Redevelopment Area (CRA) recently took a fresh look at the area and made the development of Town Center a high priority through its designation as an "Innovation District." The designation is intended to leverage proximity, density, and authenticity and create an experiential-living hub where residents can live, work, and play. As part of the focus, an Innovation Kick Start Program was established to incentivize development in the district by the end of 2020.

Workforce Housing

Although single-family residential price points exist at all levels in Palm Coast, there is an increasing need to address workforce housing opportunities that support the emerging economic development vision of the community.



IDEAL CANDIDATE



The City of Palm Coast seeks an enthusiastic leader with a commitment to professionalism and a dedication to public service. The ideal candidate will have a demonstrated track record of resourceful, entrepreneurial approaches to development and must be willing to consider creative strategies to address high-growth community issues and challenges. The next City Manager will have a sense of vision for both the organization and community that will ensure sustainable future growth.

A candidate with a strong financial background and sound business acumen, including long-term capital planning and budgeting skills, is strongly desired. An ability to cultivate and maintain a positive relationship with the City Council and help build consensus while guiding the future direction of the City will be essential. Open-minded and flexible, the new City Manager will have a demonstrated commitment to continuous process improvement and the aggressive pursuit of state and federal grant funding opportunities that will help the City continue to provide a high quality of life to residents.

The new City Manager will be a seasoned team-builder with a collaborative, pro-active management style. The City Manager will foster a culture of transparency and accountability throughout the organization. A delegator, as opposed to a micromanager, the ideal candidate will be comfortable allowing senior leadership to manage their respective operations with broad direction. A candidate who has an ability to coach, mentor, motivate, and build a high-performance, results-driven team and a commitment to the professional development of employees will be successful.

The chosen candidate will be accessible and possess exceptional interpersonal and communication skills, with the ability to educate and effectively convey information and ideas to individuals at all educational levels. The City Manager will be highly visible in the community and should be comfortable dealing with a high level of citizen and business engagement. Personable, humble, and easy-going, the ideal candidate will have a strong sense of humor, and the soft skills, emotional intelligence, and public relations experience needed to build strong relationships with staff, Council, citizens, intergovernmental agencies, and the media.

Excellent negotiation skills, collective bargaining experience, and the ability to help stakeholders come to consensus on community issues are essential qualifications. Thorough knowledge of emergency management practices, state/FEMA reimbursement processes, and water, wastewater, and stormwater systems is a plus.



EDUCATION AND EXPERIENCE

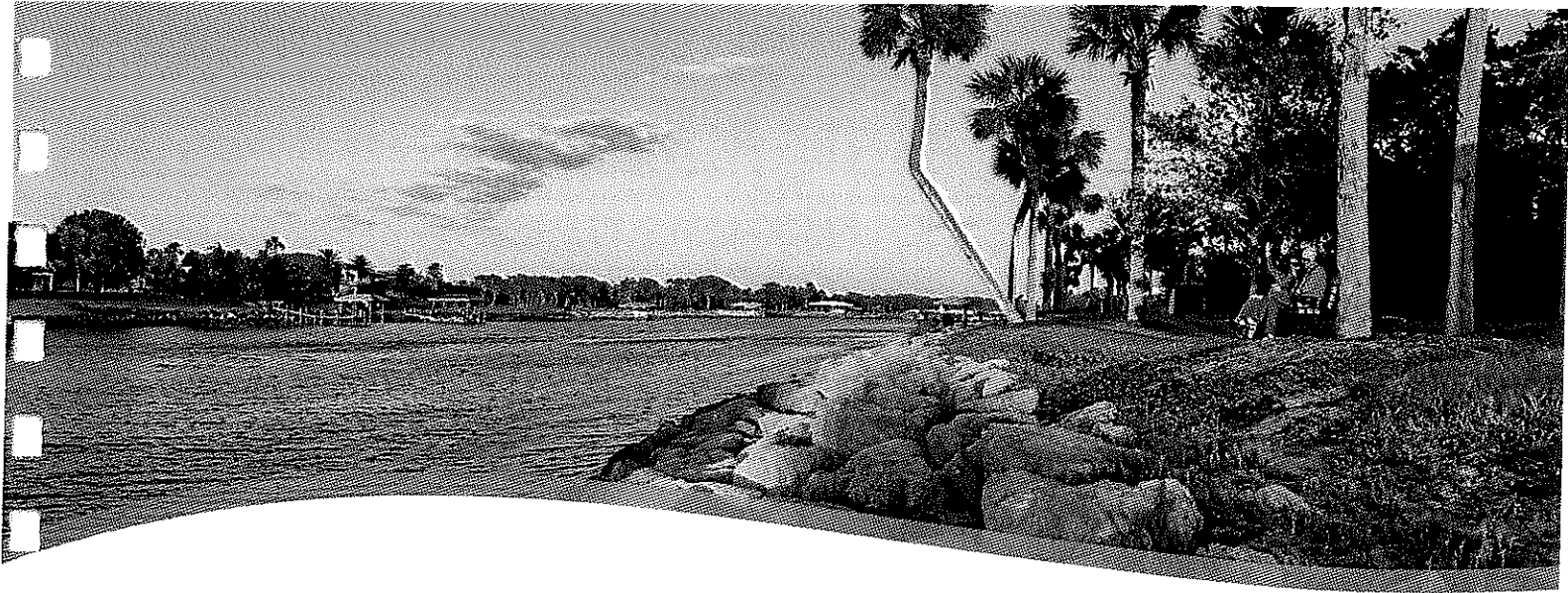
The selected candidate must hold a bachelor's degree in public administration, business administration, or a related field; a master's degree is preferred. A minimum of eight years of progressively responsible experience in a city manager's office managing and administering a municipal government and/or as a department head is required. Any combination of education and experience that provides the required knowledge and skills will also be considered.

The final selected candidate shall establish residency within the corporate limits of the City within six (6) months of appointment. Upon request, residency may be extended by the City Council for an additional six-month period.



COMPENSATION AND BENEFITS

The City of Palm Coast offers a competitive salary depending on qualifications and experience. The City provides a generous benefits program including health, dental, life insurance, and paid vacation and sick leave.



APPLICATION PROCESS

Please apply online at: <http://bit.ly/SGRCurrentSearches>

For more information on this position contact:

Doug Thomas, Senior Vice President
Strategic Government Resources
DouglasThomas@GovernmentResource.com
540-820-0531



This position is open until filled. To view the status of this position, please visit:
<http://bit.ly/SGRCurrentSearches>

The City of Palm Coast is an Equal Opportunity Employer and values diversity in its workforce. Applicants selected as finalists for this position will be subject to a comprehensive background check. **Pursuant to the Florida Public Records Act, all applications are subject to public disclosure upon receipt; however, public record requests regarding candidates do not typically occur prior to the selection of semifinalists and/or finalists.**

RESOURCES

City of Palm Coast
palmcoastgov.com

Strategic Plan
bit.ly/PalmCoastStrategicPlan

Comprehensive Plan
palmcoastgov.com/about/comp-plan

FY 2019 Annual Budget
palmcoastgov.com/government/finance/budget-preparation

Flagler County Department of Economic Opportunity
FlaglerCountyEDC.com

Public Schools Website
flaglerschools.com

Follow Us



CITY OF PALM COAST CITY MANAGER CANDIDATE REVIEW

FORCED RANKING FORM

Beau Falgout

Donald Kewley

Matthew Morton

Robin Hayes

Instructions:

In the space beside each candidate, simply assign 1 point to the candidate who is your top choice. Then, assign 2 points to your second choice, 3 to your third choice, etc.



TEAM VIEW



Team Report
(4 People)

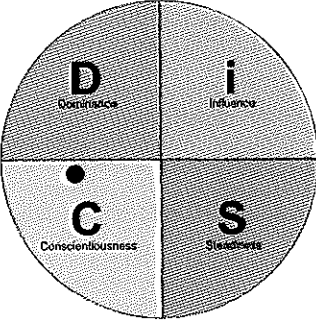
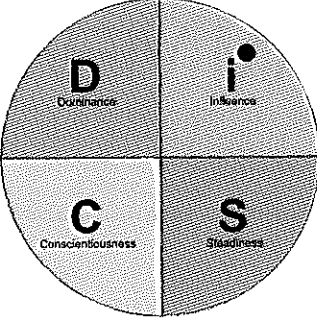
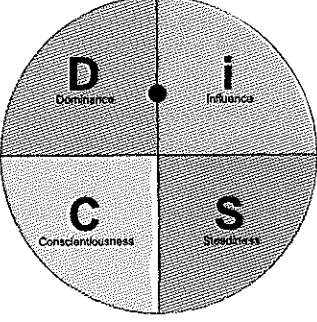
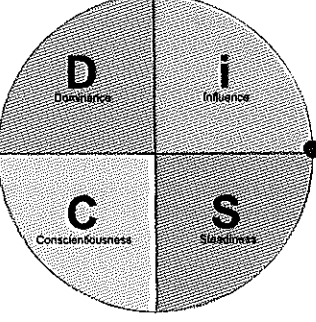
Tuesday, February 26, 2019

This report is provided by:

Strategic Government Resources, Inc.
PO Box 1642
Keller, TX 76244
1-817-337-8581
www.GovernmentResource.com



WILEY

<p>Beau Falgout</p>  <p>CD Style</p>	<p>Robin Hayes</p>  <p>i Style</p>	<p>Donald Kewley</p>  <p>iD Style</p>	<p>Matthew Morton</p>  <p>iS Style</p>

MANAGEMENT PROFILE

EVERYTHING **DiSC**
MANAGEMENT

ASSESSMENT TO ACTION.

Casey Tyler
Wednesday, January 15, 2014

This report is provided by:

Wiley
Tim Tessman
800-653-3472

WILEY

WILEY

INTRODUCTION TO DISC®

Welcome to Everything DiSC®

Casey, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on creating lively environments and relationships.

Or, maybe you're more comfortable working with those who take an optimistic, fast-paced approach than those who work at a steadier pace.

Or, perhaps you relate best to people who are more enthusiastic than analytical.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

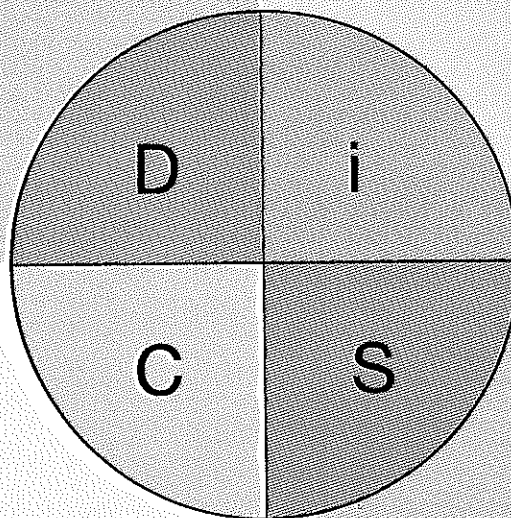
- ▶ All DiSC style are **equally valuable**, and people with all styles can be effective managers.
- ▶ Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- ▶ **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- ▶ Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- ▶ You can improve the quality of your management experience by using DiSC to build more **effective relationships**.

DOMINANCE

- Direct
- Results-oriented
- Firm
- Strong-willed
- Forceful

INFLUENCE

- Outgoing
- Enthusiastic
- Optimistic
- High-spirited
- Lively



- Analytical
- Reserved
- Precise
- Private
- Systematic

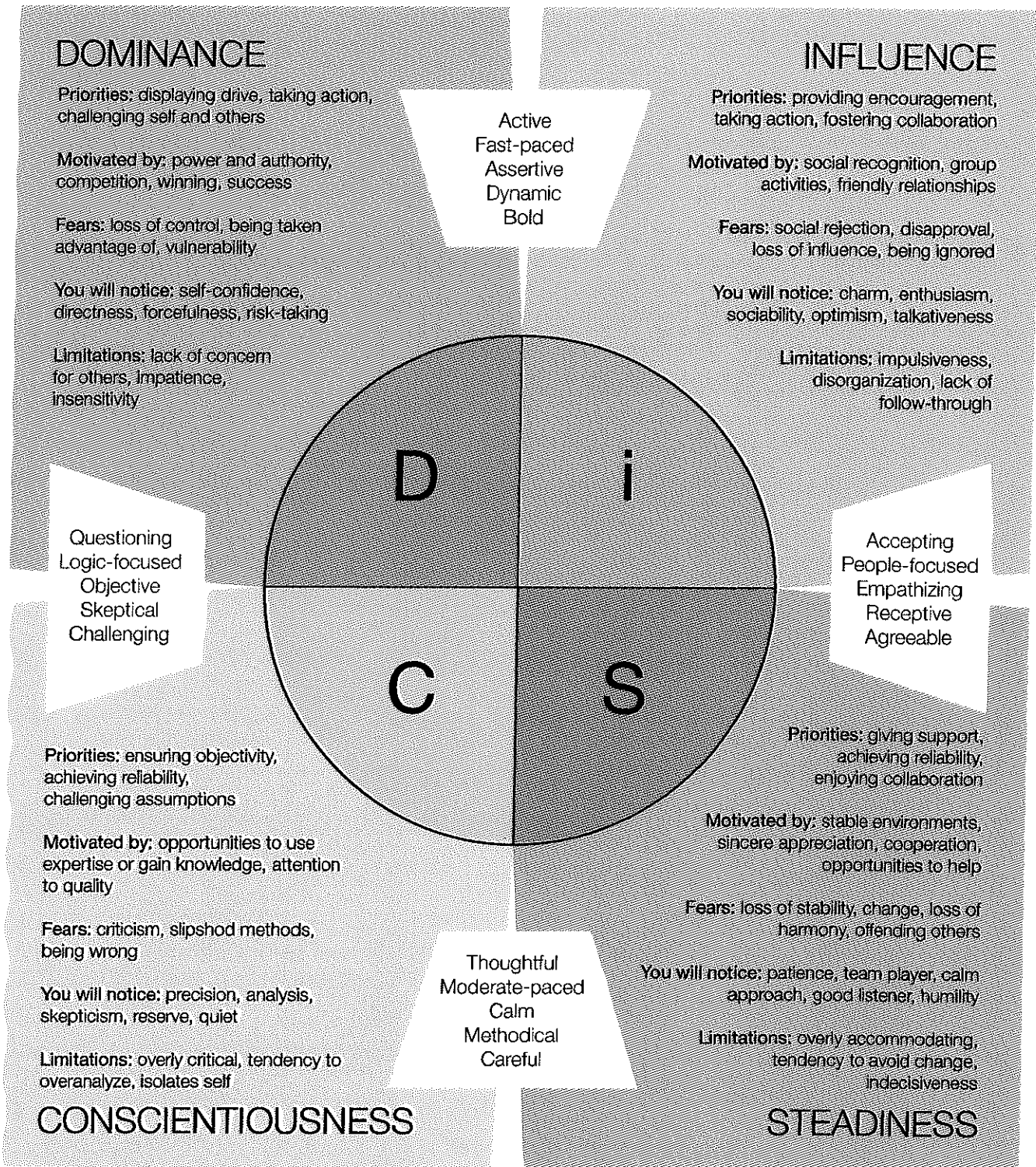
- Even-tempered
- Accommodating
- Patient
- Humble
- Tactful

CONSCIENTIOUSNESS

STEADINESS

APPENDIX: OVERVIEW OF THE DISC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



NAVIGATING THE LEGAL ASPECTS OF INTERVIEW QUESTIONS

These types of questions are illegal or inappropriate:

Are you a U.S. Citizen?

- It is legal to ask, "Are you legally eligible to work in the U.S.?"

What is your nationality?

- Questions regarding names, accents, facial features, etc. that might be used to determine nationality should be avoided.

Have you ever been arrested?

- It is legal to ask, "Have you ever been convicted of a crime?"
- There may be some agencies that have latitude with this question—specifically law enforcement agencies. However, such questions are best suited for applications that have been thoroughly screened by legal experts, not interviews.

Have you ever filed for bankruptcy?

- Organizations may have latitude with this question depending on the nature of the position they are filling. With that said, it is wise to not ask the question in an interview context.

Do you have a medical condition?

- Employers are allowed to state required job functions and ask, if asked of all applicants, "Can you fulfill the requirements of this job with or without reasonable accommodation?" If the applicant lies during the hiring process, the organization has legal grounds for disciplinary action or dismissal.

Are you married?

- Could be prejudicial and should not be asked.

Are you planning on starting a family?

- Having a child is protected by law.

What are your childcare arrangements?

- Could be prejudicial and should not be asked.

It is illegal to make hiring decisions based on applicants' protected characteristics and activities. "Protected characteristics" are defined by Title VII of the Civil Rights Act of 1964. They include:

- Race
- Color
- Religion
- Sex
- National Origin

Subsequent legislation prohibits discrimination based on:

- Age (40 years of age or older)
- Disability
- Genetic information
- Pregnancy
- Marital Status

BOTTOM LINE

During the interview process, stick with the applicant's ability to fulfill the requirements of the position.

Are you a member of a union or labor organization?

- Such activity is protected by law and should not be asked. If the position requires specific membership, a question may legally be posed as, "This position requires membership in Labor Organization ABC. Are you able to fulfill the requirements of the position?"

Have you ever sued a former employer?

- Federal law protects such activity and the question should not be asked.

Have you ever filed a workers' compensation claim?

- Such activity is protected by law and should not be asked.

When did you graduate from high school/college?

- Could be fishing for an applicant's age. Note: Human Resources will determine an applicant's age, educational level, etc. While contextually appropriate for certain aspects of the application process, such questions are not appropriate for the interview.

Are you available to work on Easter Sunday?

- A question of this nature could constitute religious harassment. The question should be worded as, "This job requires working on weekends and holidays. Can you fulfill those requirements with or without reasonable accommodation?"

Questions regarding health:

Organizations should make no inquiries into an individual's health history, physical wellness, hospitalizations, surgeries, health status of family members, etc.

As previously stated, the organization can spell out necessary requirements of a job, i.e., this job requires standing up for three hours per day, this job requires approximately 40% travel, this job requires dependable transportation and a valid driver's license, etc.

Organizations may ask questions that relate directly to the requirements of the job, the applicant's ability to do the job, and relevant experience, knowledge, and skills.

Organizations may utilize applicant assessments as long as those assessments are administered to ALL applicants at any given stage of the interviewing process. The results of the assessments may be part of the interview conversation, but such conversations should clearly exhibit established pattern and practice. Structuring the interviews and subsequently utilizing the structure for every interview increases that likelihood.

It is perfectly acceptable to ask questions related to previous contexts as long as those questions relate to skills, talents, attitudes, etc. For example, "Tell us about a time when you had to reprimand an employee. How did you handle that situation?" or "Reflect on a situation when you and a co-worker disagreed on something. How did you resolve the issue?"

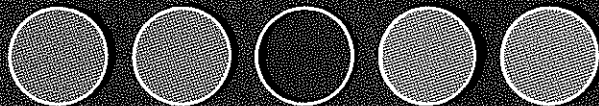
The key is stay away from protected characteristics and focus on job ability.



Model

Employment Agreement

ICMA contact:
Martha Perego
ICMA Director of Ethics
Membership Team Leader
202.962.3668
mperego@icma.org



ICMA³



Leaders at the Core of Better Communities

ICMA advances professional local government worldwide. Its mission is to create excellence in local governance by developing and advancing professional management of local government. ICMA, the International City/County Management Association, provides member support; publications, data, and information; peer and results-oriented assistance; and training and professional development to more than 9,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect 185 million individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

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icma.org

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Introduction

This Agreement, made and entered into this [date], by and between the [local government] of [state], [town/city/county] a municipal corporation, (hereinafter called "Employer") and [name], (hereinafter called "Employee") an individual who has the education, train-

ing and experience in local government management and who, as a member of the International City/County Management Association (ICMA), is subject to the ICMA Code of Ethics, both of whom agree as follows:

Section 1: Term

Recommended Language

A. This agreement shall remain in full force and effect from [date] until terminated by the Employer or Employee as provided in Section 9, 10 or 11 of this agreement.

Option 1

The term of this agreement shall be for an initial period of [#] years from [date] to [date]. This Agreement shall automatically be renewed on its anniversary date for a [#] year term unless notice that the Agreement shall terminate is given at least [#] months

(12 months recommended) before the expiration date. In the event the agreement is not renewed, all compensation, benefits and requirements of the agreement shall remain in effect until the expiration of the term of the Agreement unless Employee voluntarily resigns.

In the event that the Employee is terminated, as defined in Section 9 of this agreement, the Employee shall be entitled to all compensation including salary, accrued vacation and sick leave, car allowance paid in lump sum or in a continuation of salary on the existing [biweekly/monthly] basis, at the Employee's option, plus continuation of all benefits for the remainder of the term of this agreement.

Section 2: Duties and Authority

Recommended Language

A. Employer agrees to employ [name] as [title] to perform the functions and duties specified in [legal reference] of the [local government] charter and/or by ordinance (#) dated [legal reference] of the [local government] code and to perform other legally permissible and proper duties and functions without interference.

B. Employee is the chief executive officer of the Employer and shall faithfully perform the duties as prescribed in the job description as set forth in the Employer's charter and/or ordinances and as may be lawfully assigned by the Employer and shall comply with all lawful governing body directives, state and federal law, Employer policies, rules and ordinances as they exist or may hereafter be amended.

C. Specifically, it shall be the duty of the Employee to employ on behalf of the Employer all other employees of the organization consistent with the policies of the governing body and the ordinances and charter of the Employer.

D. It shall also be the duty of the Employee to direct, assign, reassign and evaluate all of the employees of the Employer consistent with policies, ordinances, charter, state and federal law.

E. It shall also be the duty of the Employee to organize, reorganize and arrange the staff of the Employer and to develop and establish internal regulations, rules and procedures which the Employee deems necessary for the efficient and effective operation of the Employer consistent with the lawful directives, policies, ordinances, state and federal law.

F. It shall also be the duty of the Employee to accept all resignations of employees of the Employer consistent with the policies, ordinances, state and federal law, except the Employee's resignation which must be accepted by the governing body.

G. The Employee shall perform the duties of (city, county or town) manager of the Employer with reasonable care, diligence, skill and expertise.

H. All duties assigned to the Employee by the governing body shall be appropriate to and consistent with the professional role and responsibility of the Employee.

I. The Employee cannot be reassigned from the position of (city, county or town) manager to another position without the Employee's express written consent.

J. The Employee or designee shall attend, and shall be permitted to attend, all meetings of the governing

body, both public and closed, with the exception of those closed meetings devoted to the subject of this Agreement, or any amendment thereto or the Employee's evaluation or otherwise consistent with state law.

K. The governing body, individually and collectively, shall refer in a timely manner all substantive criticisms, complaints and suggestions called to their attention to the Employee for study and/or appropriate action.

Section 3: Compensation

Recommended Language

A. Base Salary: Employer agrees to pay Employee an annual base salary of [\$ amount], payable in installments at the same time that the other management employees of the Employer are paid.

B. This agreement shall be automatically amended to reflect any salary adjustments that are provided or required by the Employer's compensation policies to include all salary adjustments on the same basis as applied to the executive classification of employees.

C. In addition, consideration shall be given on an annual basis to an increase in compensation.

Options for Section 3. C Compensation

Option 1

The Employer agrees to increase the compensation of the Employee dependent upon the results of the performance evaluation conducted under the provisions of Section 12 of this Agreement. Increased compensation can be in the form of a salary increase and/or performance incentive and/or an increase in benefits.

Option 2

The Employer agrees to increase the compensation of the Employee dependent upon the results of the performance evaluation conducted under the provisions of Section 12 of this Agreement in addition to providing a fixed annual increase in the Employee's salary

based on an agreed upon economic indicator, such as the Consumer Price Index.

Option 3

The Employer agrees to increase the compensation by [%] each year.

Option 4

The Employer agrees to increase the compensation each year by at least the average across the board increase granted to other employees of the Employer.

D. At any time during the term of the Agreement, Employer may, in its discretion, review and adjust the salary of the Employee, but in no event shall the Employee be paid less than the salary set forth in Section 3.A. of the Agreement except by mutual written agreement between Employee and Employer. Such adjustments, if any, shall be made pursuant to a lawful governing body action. In such event, Employer and Employee agree to provide their best efforts and reasonable cooperation to execute a new agreement incorporating the adjusted salary.

E. Except as otherwise provided in this Agreement, the Employee shall be entitled, at a minimum, to the highest level of benefits enjoyed by and/or available to other employees, department heads or general employees of the Employer as provided by the Employer's policies, Charter, ordinances, or personnel rules and regulations or other practices.

Section 4: Health, Disability and Life Insurance Benefits

Recommended Language

A. The Employer agrees to provide and to pay the premiums for health, hospitalization, surgical, vision, dental and comprehensive medical insurance for the Employee and his/her dependents, at a minimum, equal to that which is provided to all other employees of the [local government]. In the event no such plan exists, Employer agrees to provide coverage for the Employee and dependents in a manner mutually agreed upon by Employer and Employee.

B. The Employer agrees to put into force and to make required premium payments for short term and long term disability coverage for the Employee.

C. The Employee may elect to submit once per calendar year to a complete physical examination, including a cardio-vascular examination, by a qualified physician selected by the Employee, the cost of which shall be paid by the Employer.

D. The Employer shall pay the amount of premium due for term life insurance in the amount of three (3) times the Employee's annual base salary, including all increases in the base salary during the life of this agreement. The Employee shall name the beneficiary of the life insurance policy.

Option 1

A. The Employer agrees to provide for full health, hospitalization, surgical, vision, dental and comprehensive medical insurance for the Employee and his/her dependents on an equivalent basis to that which is provided to all other employees of the [local government]. and Employer shall pay all premiums for the Employee and the Employee's dependents. In the event no such plan exists, Employer agrees to provide full coverage for the

Employee and dependents in a manner mutually agreed upon by Employer and Employee.

B. The Employer agrees to put into force and to make required premium payments for short term and long term disability coverage for the Employee.

C. The Employee may elect to submit once per calendar year to a complete physical examination, including a cardio-vascular examination, by a qualified physician selected by the Employee, the cost of which shall be paid by the Employer.

D. The Employer shall pay the amount of premium due for term life insurance in the face amount of three (3) times the Employee's annual base salary, including all increases in the base salary during the life of this agreement. If such coverage is not available through the Employer's insurance carrier or the Employee elects to obtain coverage through a different insurance carrier, the Employer shall reimburse the Employee for the cost of the premiums in an amount equal to the same value as that provided by the Employer's insurance carrier. The Employee shall own the life insurance policy and the life insurance policy shall be in the name of the Employee and the Employee shall have the right to name the beneficiary of the life insurance policy.

Option 2

E. The Employer shall provide business travel insurance for the Employee while the Employee is traveling on the Employer's business, and the Employee shall name the beneficiary thereof. Should the Employee die while on travel for the Employer, the Employer shall cover the full cost of retrieving and transporting the Employee's remains back to the custody of the Employee's family.

Section 5: Vacation, Sick, and Military Leave

Recommended Language

A. Upon commencing employment, the Employee shall be credited with [#] accrued sick leave hours and [#] accrued vacation leave hours. In addition, beginning the first day of employment, Employee shall accrue sick leave and vacation leave on an annual basis, at a minimum, at the highest rate provided or

available to any other employees, under the same rules and provisions applicable to other employees.

Option 1

Beginning the first day of employment, Employee shall accrue sick leave and vacation leave on an annual basis equivalent to the number of years served in the profession.

B. Upon commencing employment, the Employee shall have access to a bank of 180 sick days to be used in the case of serious medical conditions. This leave can only be used to provide coverage during the waiting period between the onset of illness or disability and the point at which short or long term disability coverage takes effect and may be renewed after each occurrence.

C. The Employee is entitled to accrue all unused leave, without limit, and in the event the Employee's employment is terminated, either voluntarily or

involuntarily, the Employee shall be compensated for all accrued vacation time, all paid holidays, executive leave, and other benefits to date.

D. The Employee shall be entitled to military reserve leave time pursuant to state law and [local government] policy.

Option 2

E. The Employee shall annually be credited with five (5) days of executive leave.

Section 6: Automobile

Recommended Language

The Employee's duties require exclusive and unrestricted use of an automobile to be mutually agreed upon and provided to the Employee at the Employer's cost, subject to approval by Employer which shall not be withheld without good cause. It shall be mutually agreed upon whether the vehicle is purchased by the Employer, provided under lease to the Employer or to the Employee, or provided through a monthly allowance.

Option 1—Monthly Vehicle Allowance

The Employer agrees to pay to the Employee, during the term of this Agreement and in addition to other salary and benefits herein provided, the sum of [dollar amount] per year, payable monthly, as a vehicle allowance to be used to purchase, lease, or own, operate and maintain a vehicle. The monthly allowance shall be increased annually by [% or \$] amount. The

Employee shall be responsible for paying for liability, property damage, and comprehensive insurance coverage upon such vehicle and shall further be responsible for all expenses attendant to the purchase, operation, maintenance, repair, and regular replacement of said vehicle. The Employer shall reimburse the Employee at the IRS standard mileage rate for any business use of the vehicle beyond the greater [local government] area. For purposes of this Section, use of the car within the greater [local government] area is defined as travel to locations within a _____ mile (recommended one hundred (100) mile) radius of the local government limits.)

Option 2—Employer Provided Vehicle

The Employer shall be responsible for paying for liability, property damage, and comprehensive insurance, and for the purchase (or lease), operation, maintenance, repair, and regular replacement of a full-size automobile.

Section 7: Retirement

Recommended Language

The Employer agrees to enroll the Employee into the applicable state or local retirement system and to make all the appropriate contributions on the Employee's behalf.

In addition to the Employer's payment to the state or local retirement system (as applicable) referenced above, Employer agrees to execute and keep in force all neces-

sary agreements provided by ICMA Retirement Corporation [ICMA-RC] or any other Section 457 deferred compensation plan for Employee's [continued] participation in said supplementary retirement plan. In addition to the base salary paid by the Employer to Employee, Employer agrees to pay an amount equal to [percentage of Employee's base salary, fixed dollar amount of [\$] , or maximum dollar amount permissible under Federal and state law into the designated plan on the Employee's

behalf, in equal proportionate amount each pay period. The Employer and Employee shall fully disclose to each other the financial impact of any amendment to the terms of Employee's retirement benefit.

In lieu of making a contribution to a Section 457 deferred compensation plan, the dollar value of this contribution may be used, at the Employee's option, to purchase previous service from another qualified plan.

Option 1

Recognizing that effective service with the community is based in part on the stability provided through a long-term relationship, the Employer shall provide a retirement annuity, as directed by the Employee, at a rate of [dollar amount], payable at the completion of each quarter of the fiscal year. This annuity serves as a retirement contribution and does not require further action of the Employer.

Option 2

The Employer shall adopt a qualified 401(a) defined contribution plan offered through ICMA Retirement Corporation for the Employee in the form of a money purchase plan to which the Employer shall contribute [%] of com-

ensation annually. The 401(a) plan shall be established as an employer paid plan with non-discretionary contributions by the Employer and the Employee shall have no right to receive such contributions in cash. The 401(a) plan shall be established under a written plan document that meets the requirements of the IRS Code and such document is hereby incorporated herein by reference. The funds for the 401(a) plan shall be invested in such investment vehicles as are allowable under the IRS Code and the Employee shall make the sole determination as to how the funds are invested.

Option 2 A: The Employee shall be required to contribute [%] of base salary or [dollar amount] annually on a pre-tax basis as a condition of participation.

Option 3

The Employer shall adopt a qualified 401(a) profit-sharing plan offered through ICMA Retirement Corporation for the Employee in the form of a money purchase plan to which the Employer shall contribute [%] of all performance bonuses annually.

Option 3 A: The Employee shall be required to contribute [%] of base salary or [dollar amount] annually on a pre-tax basis as a condition of participation.

Section 8: General Business Expenses

Recommended Language

A. Employer agrees to budget and pay for professional dues, including but not limited to the International City/County Management Association, and subscriptions of the Employee necessary for continuation and full participation in national, regional, state, and local associations, and organizations necessary and desirable for the Employee's continued professional participation, growth, and advancement, and for the good of the Employer.

B. Employer agrees to budget and pay for travel and subsistence expenses of Employee for professional and official travel, meetings, and occasions to adequately continue the professional development of Employee and to pursue necessary official functions for Employer, including but not limited to the ICMA Annual Conference, the state league of municipalities, and such other national, regional, state, and local governmental groups and committees in which Employee serves as a member.

C. Employer also agrees to budget and pay for travel and subsistence expenses of Employee for short courses, institutes, and seminars that are necessary for the Employee's professional development and for the good of the Employer.

D. Employer recognizes that certain expenses of a non-personal but job related nature are incurred by Employee, and agrees to reimburse or to pay said general expenses. Such expenses may include meals where Employer business is being discussed or conducted and participation in social events of various organizations when representing the Employer. Such expenditures are subject to annual budget constraints as well as state and Employer ethics and purchasing policies. The finance director is authorized to disburse such moneys upon receipt of duly executed expense or petty cash vouchers, receipts, statements or personal affidavits.

E. The Employer acknowledges the value of having Employee participate and be directly involved in local civic clubs or organizations. Accordingly, Employer

shall pay for the reasonable membership fees and/or dues to enable the Employee to become an active member in local civic clubs or organizations.

F. Recognizing the importance of constant communication and maximum productivity, Employer shall provide Employee, for business and personal use, a laptop computer, software, internet connection at Employee's permanent residence, mobile phone/personal digital assistant and/or tablet computer for business and

personal use, and pager for business and personal use required for the Employee to perform their duties and to maintain communication with Employer's staff and officials as well as other individuals who are doing business with Employer. Upon termination of Employee's employment, the equipment described herein shall become the property of the Employee and at the discretion of the Employee any mobile phone number shall be transferred to the Employee.

Section 9: Termination

Recommended Language

A. For the purpose of this agreement, termination shall occur when:

1. The majority of the governing body votes to terminate the Employee in accordance with (cite applicable local law) at a properly posted and duly authorized public meeting.
2. If the Employer, citizens or legislature acts to amend any provisions of the [charter, code, enabling legislation] pertaining to the role, powers, duties, authority, responsibilities of the Employee's position that substantially changes the form of government, the Employee shall have the right to declare that such amendments constitute termination.
3. If the Employer reduces the base salary, compensation or any other financial benefit of the Employee, unless it is applied in no greater percentage than the average reduction of all department heads, such action shall constitute a breach of this agreement and will be regarded as a termination.

4. If the Employee resigns following an offer to accept resignation, whether formal or informal, by the Employer as representative of the majority of the governing body that the Employee resign, then the Employee may declare a termination as of the date of the suggestion.

5. Breach of contract declared by either party with a 30 day cure period for either Employee or Employer. Written notice of a breach of contract shall be provided in accordance with the provisions of Section 20.

Option 1

A. In the event the Employee is terminated by the Employer during the six (6) months immediately following the seating and swearing-in of one or more new governing body members, and during such time that Employee is willing and able to perform his duties under this Agreement, then, Employer agrees to pay Severance in accordance with Section 10 plus salary and benefits in accordance with Section 10 for any portion of the six months not worked.

Section 10: Severance

Severance shall be paid to the Employee when employment is terminated as defined in Section 9.

A. If the Employee is terminated, the Employer shall provide a minimum severance payment equal to twelve (12) months salary at the then current rate of pay. This severance shall be paid in a lump sum or in a continuation of salary on the existing [biweekly/monthly] basis, at the Employee's option,

B. The Employee shall also be compensated for all sick leave, vacation leave, and all paid holidays.

The Employer agrees to make a contribution to the Employee's deferred compensation account on the value of this compensation calculated using the then current annual salary of Employee at the date of termination divided by two thousand and eighty (2080) hours. If the amount of the contribution under this Section exceeds the limit under the Code for a contribution to the Deferred Compensation plan, the remainder shall be paid to the Employee in a lump sum as taxable compensation.

C. For a minimum period of one year following termination, the Employer shall pay the cost to continue the following benefits:

1. Health insurance for the employee and all dependents as provided in Section 4A, after which time, Employee will be provided access to health insurance pursuant to the Consolidated Omnibus Budget Reconciliation Act ("COBRA").
2. Life insurance as provided in Section 4D
3. Short-term and long-term disability as provided in Section 4B
4. Car allowance or payment of lease, or provide option to buy Employer's vehicle at depreciated value
5. Out placement services should the employee desire

them in an amount not to exceed [\$10,000 to \$15,000 recommended], and

6. Any other available benefits.

D. If the Employee is terminated because of a felony conviction, then the Employer is not obligated to pay severance under this section.

E. The termination and severance of Employee shall be in accordance with the "Separation Agreement" agreed to by Employer and Employee. A template for such agreement is provided by ICMA, and is incorporated herein by reference.

**Provisions for severance and severance related benefits may be governed by state and/or local law. Before entering into negotiations, both parties should be knowledgeable about relevant legal provisions.*

Section 11: Resignation

In the event that the Employee voluntarily resigns his/her position with the Employer, the Employee shall

provide a minimum of 30 days notice unless Employer and Employee agree otherwise.

Section 12: Performance Evaluation

A. Employer shall annually review the performance of the Employee in [month] subject to a process, form, criteria, and format for the evaluation which shall be mutually agreed upon by the Employer and Employee.

The annual evaluation process, at a minimum, shall include the opportunity for both parties to: (1) conduct a formulary session where the governing body and the Employee meet first to discuss goals and objectives of both the past twelve (12) month performance period as well as the upcoming twelve (12) month performance period, (2) following that formulary discussion, prepare a written evaluation of goals and objectives for the past and upcoming year, (3) next meet and discuss the written evaluation of these goals and objectives, and (4) present a written summary of the evaluation results to the Employee. The final written evaluation should be completed and delivered to the Employee within 30 days of the initial formulary evaluation meeting.

B. Unless the Employee expressly requests otherwise in writing, the evaluation of the Employee shall at all times be conducted in executive session of the governing body and shall be considered confidential to the extent permitted by law. Nothing herein shall prohibit the Employer or Employee from sharing the content of the Employee's evaluation with their respective legal counsel.

C. In the event the Employer deems the evaluation instrument, format and/or procedure is to be modified by the Employer and such modifications would require new or different performance expectations, then the Employee shall be provided a reasonable period of time to demonstrate such expected performance before being evaluated.

D. In the event the Employee is an ICMA Credentialed Manager, the multi-rater evaluation tool will be utilized at a minimum of every five years.

Section 13: Hours of Work

It is recognized that the Employee must devote a great deal of time outside the normal office hours on business for the Employer, and to that end Employee shall be allowed to establish an appropriate work schedule.

The schedule shall be appropriate to the needs of the Employer and shall allow Employee to faithfully perform his or her assigned duties and responsibilities.

Section 14: Ethical Commitments

Employee will at all times uphold the tenets of the ICMA Code of Ethics, a copy of which is attached hereto and incorporated herein. Specifically, Employee shall not endorse candidates, make financial contributions, sign or circulate petitions, or participate in fund-raising activities for individuals seeking or holding elected office, nor seek or accept any personal enrichment or profit derived from confidential information or misuse of public time.

Employer shall support Employee in keeping these

commitments by refraining from any order, direction or request that would require Employee to violate the ICMA Code of Ethics. Specifically, neither the governing body nor any individual member thereof shall request Employee to endorse any candidate, make any financial contribution, sign or circulate any petition, or participate in any fund-raising activity for individuals seeking or holding elected office, nor to handle any matter of personnel on a basis other than fairness, impartiality and merit.

Section 15: Outside Activities

The employment provided for by this Agreement shall be the Employee's primary employment. Recognizing that certain outside consulting or teaching opportunities provide indirect benefits to the Employer and the community, the Employee may elect to accept limited

teaching, consulting or other business opportunities with the understanding that such arrangements must neither constitute interference with nor a conflict of interest with his or her responsibilities under this Agreement.

Section 16: Moving and Relocation Expenses

Recommended Language

Employee agrees to establish residence within the corporate boundaries of the local government, if required, within [number] months of employment, and thereafter to maintain residence within the corporate boundaries of the local government.

A. Employer shall pay directly for the expenses of moving Employee and his/her family and personal property from [location name] to [location name]. Said moving expenses include packing, moving, storage costs, unpacking, and insurance charges. The Employee shall provide evidence of actual moving expenses by securing quotations from three (3) companies. The Employee shall submit these quotes to the Employer who, in consultation with the Employee, shall select the moving company.

B. Employer shall reimburse Employee for actual lodging and meal expenses for his/her family in route from [location name] to [location name]. Mileage costs for moving two personal automobiles shall be reimbursed at the current IRS allowable rate of [cents amount] per mile.

C. Employer shall pay Employee an interim housing supplement of [dollar amount] per month for a period commencing [date], and shall continue for a maximum of [#] months, or until a home is purchased and closed on, within the corporate limits of the [local government name], whichever event occurs first.

D. Employer shall reimburse Employee for a total of [number] round trip air fares for Employee and his/her family [amount of total tickets] at any time during the first year of service to assist with house hunting and other facets of the transition and relocation process. The

Employee and his/her family may utilize and distribute the total [enter number] individual round trip tickets in any combination of individual members making the trips. The Employee shall be reimbursed for actual lodging and meal expenses incurred by Employee or his/her family members on any trips conducted prior to relocation, as detailed herein.

E. The Employee shall be reimbursed, or Employer may pay directly, for the expenses of packing and moving from temporary housing to permanent hous-

ing during the first year of this agreement. The cost of this move shall not exceed (dollar amount).

F. The Employer shall pay the Employee's tax liability on all Employer provided benefits for relocation and housing.

Option 1

The Employer shall pay a lump sum payment of [\$] to the Employee to cover relocation costs.

Section 17: Home Sale and Purchase Expenses

Recommended Language

A. Employee shall be reimbursed for the direct costs associated with the sale of Employee's existing personal residence, said reimbursement being limited to real estate agents' fees, and other closing costs that are directly associated with the sale of the house. Said reimbursement should not exceed the sum of [\$].

B. Employee shall be reimbursed for the costs incidental to buying or building a primary residence within the [local government], including real estate fees, title insurance, and other costs directly associated with the purchase or construction of the house, said reimbursement not to exceed the sum of [\$].

Option 1

Employer shall reimburse Employee for up to three discount points within thirty (30) days following purchase of a home within the corporate limits of [local government name], in an effort to minimize mortgage rate differentials.

Option 2

Employer shall provide Employee with a _____ [fixed-interest, variable-interest, interest-only] loan to purchase a house. The amount of the loan shall not exceed \$_____. The loan shall be repaid in full to the Employer upon the occurrence of either of the following events: (i) the home, or the Employee's interest in the home, is sold, transferred, or conveyed, or (ii) the Employee's employment with the Employer, for any reason, is terminated. The Employer and Employee shall execute any and all documents necessary to document this transaction.

Option 3

Employer agrees to provide the Employee a loan for the purchase of a home in an amount not to exceed [dollar amount]. Employee shall pay Employer a monthly mortgage payment of [dollar amount] for interest, which is equal to the amount currently being paid in principle and interest for the current residence. Employee shall accrue equity at a rate of [%] per month.

Upon termination of employment with the Employer, Employee shall have a maximum of six months to sell the home while continuing to reside in it under the terms and conditions here. Should the home sell during the time period, Employer shall receive 100% of the proceeds minus the percentage of equity accrued by Employee as described above, and minus the amount of equity originally invested by Employee. Said accrued equity and original equity shall both be payable to Employee upon closing. Said original equity invested shall be calculated as an amount equal to the percentage of original purchase price, represented by the original equity investment by Employee, and adjusted to be the same percentage of equity in the current sale price of the home. All closing costs borne by the seller shall be split between Employer and Employee in a proportion equal to the equity share described above. Should the house fail to sell within the allotted six month time period, Employer has the option of allowing the previous arrangement to continue in place or to purchase equity, calculated as provided above, plus the original cost of all improvements made to the property.

Option 4

A. Employer shall provide a residence for Employee at no cost to Employee other than the monthly cost of all utilities and services. Should Employee choose to not accept the housing no additional housing incentive shall be provided to Employee.

B. Upon separation, voluntary or involuntary, Employee shall vacate the residence with six (6) months of date of separation.

Option 5

Employee shall place their current residence on the market and make every reasonable attempt to sell residence. If after six (6) months, Employee has not sold or agreed to sell their residence the Employer shall purchase the residence from Employee at ninety percent (90%) of current list price or appraised value whichever is less. Employer shall then place the residence on the market with all proceeds of any sale to Employer.

Section 18: Indemnification

Beyond that required under Federal, State or Local Law, Employer shall defend, save harmless and indemnify Employee against any obligation to pay money or perform or no perform action, including without limitation, any and all losses, damages, judgments, interests, settlements, penalties, fines, court costs and other reasonable costs and expenses of legal proceedings including attorneys fees, and any other liabilities arising from, related to, or connected with any tort, professional liability claim or demand or any other threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative, arbitrative or investigation, whether groundless or otherwise, arising out of an alleged act or omission occurring in the performance of Employee's duties as [job title] or resulting from the exercise of judgment or discretion in connection with the performance of program duties or responsibilities, unless the act or omission involved willful or wanton conduct. The Employee may request and the Employer shall not unreasonably refuse to provide independent legal representation at Employer's expense and Employer may not unreasonably withhold approval. Legal representation, provided by Employer for Employee, shall extend until a final determination of the legal action including any appeals brought by either party. The Employer shall indemnify Employee against any and all losses,

damages, judgments, interest, settlements, penalties, fines, court costs and other reasonable costs and expenses of legal proceedings including attorneys fees, and any other liabilities incurred by, imposed upon, and suffered by such Employee in connection with or resulting from any claim, action, suit, or proceeding, actual or threatened, arising out of or in connection with the performance of his or her duties. Any settlement of any claim must be made with prior approval of the Employer in order for indemnification, as provided in this Section, to be available.

Employee recognizes that Employer shall have the right to compromise and unless the Employee is a party to the suit which Employee shall have a veto authority over the settlement, settle any claim or suit; unless, said compromise or settlement is of a personal nature to Employee. Further, Employer agrees to pay all reasonable litigation expenses of Employee throughout the pendency of any litigation to which the Employee is a party, witness or advisor to the Employer. Such expense payments shall continue beyond Employee's service to the Employer as long as litigation is pending. Further, Employer agrees to pay Employee reasonable consulting fees and travel expenses when Employee serves as a witness, advisor or consultant to Employer regarding pending litigation.

Section 19: Bonding

Employer shall bear the full cost of any fidelity or other bonds required of the Employee under any law or ordinance.

Section 20: Other Terms and Conditions of Employment

A. The Employer, only upon agreement with Employee, shall fix any such other terms and conditions of employment, as it may determine from time to time, relating to the performance of the Employee, provided such terms and conditions are not inconsistent with or in conflict with the provisions of this Agreement, the [local government] Charter, local ordinances or any other law.

B. Except as otherwise provided in this Agreement, the Employee shall be entitled, at a minimum, to the highest level of benefits that are enjoyed by or offered to other [appointed officials, appointed employees, department

heads or general employees] of the Employer as provided in the Charter, Code, Personnel Rules and Regulations or by practice.

Option 1—Appropriation

The Employer has appropriated, set aside and encumbered, and does hereby appropriate, set aside, and encumber, available and unappropriated funds of the municipality in an amount sufficient to fund and pay all financial obligations of the Employer pursuant to this Agreement, including but not limited to, the Severance and other benefits set forth in Section 10.

Section 21: Notices

Notice pursuant to this Agreement shall be given by depositing in the custody of the United States Postal Service, postage prepaid, and addressed as follows:

- (a) EMPLOYER: City of ()
address
city, state, zip
- (b) EMPLOYEE: name
address
city, state zip

Notice shall be deemed given as of the date of personal service or as the date of deposit of such written notice in the course of transmission in the United States Postal Service.

Section 22: General Provisions

A. **Integration.** This Agreement sets forth and establishes the entire understanding between the Employer and the Employee relating to the employment of the Employee by the Employer. Any prior discussions or representations by or between the Employer and Employee are merged into and rendered null and void by this Agreement. The Employer and Employee by mutual written agreement may amend any provision of this agreement during the life of the agreement. Such amendments shall be incorporated and made a part of this agreement.

B. **Binding Effect.** This Agreement shall be binding on the Employer and the Employee as well as their heirs, assigns, executors, personal representatives and successors in interest.

C. **Effective Date.** This Agreement shall become effective on _____, _____.

D. **Severability.** The invalidity or partial invalidity of any portion of this Agreement will not affect the validity of any other provision. In the event that any provision of this Agreement is held to be invalid, the remaining provisions shall be deemed to be in full force and effect as if they have been executed by both

Employer and Employee subsequent to the expungement or judicial modification of the invalid provision.

E. **Precedence.** In the event of any conflict between the terms, conditions and provisions of this Agreement and the provisions of Council's policies, or Employer's ordinance or Employer's rules and regulations, or any permissive state or federal law, then, unless otherwise prohibited by law, the terms of this Agreement shall take precedence over contrary provisions of Council's policies, or Employer's ordinances, or Employer's rules and regulations or any such permissive law during the term of this Agreement.

Name of Employer

By: _____
Governing Body Representative

Executed this the (number) day of (month), (year).

Employee

Signature: _____

Executed this the (number) day of (month),(year).

Appendix 1

SEPARATION OF EMPLOYMENT AND GENERAL RELEASE

This Separation of Employment and General Release Agreement ("Agreement") is made by and between the [local government] ("Employer") and _____ ("Employee").

WHEREAS, Employer has employed Employee as its _____; however, the parties wish to enter into a voluntary agreement to terminate their employment relationship and to resolve any actual or potential claims that either party may have against the other by reason of Employee's employment or termination thereof.

WHEREAS, The parties desire to set forth the terms and conditions governing Employee's separation of employment and to provide for the settlement and release of any and all disputes or controversies that have arisen, or which may hereafter arise, between Employer and Employee, including without limitation, any and all claims arising out of or in any way related to Employee's employment with or separation from the Employer.

NOW THEREFORE, in consideration of the mutual covenants herein contained and the mutual benefits to be derived therefrom, the sufficiency of which consideration is hereby acknowledged by the undersigned, Employer and Employee agree and state:

1. TERMINATION OF EMPLOYMENT. Upon their mutual agreement, Employee's employment _____ shall terminate on _____, 20____, which shall be Employee's final date of employment.

2. NO ADMISSION OF LIABILITY. This Agreement is not an admission by Employee or Employer of any wrongful conduct whatsoever. Both parties deny and disclaim any liability to or wrongful conduct against the other or any third party.

3. PAYMENT AND BENEFITS. Employee shall receive his/her regular paycheck for the pay period ending _____, 20__ on or before _____, 20___. Employee shall receive on or before _____, 20__ an additional payment to compensate for his accumulated leaves (vacation and floating holidays) and comp time, subject to customary payroll deductions.

As consideration for this Agreement and the release contained within, and in full and complete satisfaction

of all obligations due and owing Employee, Employer shall:

a. Pay Employee an amount equal to _____ (__) months of his current salary, subject to customary payroll deductions—to include Employee's portion of health, dental and vision insurance premiums for _____ (__) months.

b. Continue, and pay for, Employer's current health, dental and vision insurance coverages for _____ (__) months, ending on _____, 20__.

[C. INCLUDE ANY OTHER CONSIDERATION, SUCH AS AGREEING NOT TO CONTEST UNEMPLOYMENT, ALLOWING THE EMPLOYEE TO PURCHASE HIS WORK LAPTOP, ETC.]

3. SURRENDER AND VACATION OF EMPLOYER'S PROPERTY. Upon execution of this Agreement, Employee shall deliver all Employer's property in his/her possession and further, shall vacate Employer's property.

4. RELEASE AND WAIVER OF CLAIMS. In consideration of the benefits to be provided to Employee pursuant to this Agreement, Employee—including his heirs and assigns—hereby irrevocably and unconditionally releases, acquits and discharges Employer and each of its past, present and future elected officials, department heads, officers, employees, agents, representatives and attorneys from any and all charges, complaints, claims, liabilities, obligations, promises, agreements, controversies, damages, actions, causes of action, suits, rights, demands, costs, losses, debts and expenses (including attorneys' fees and costs actually incurred), of any nature whatsoever, whether known or unknown, arising out of any act, omission, or event from the beginning of time up to the execution of this Agreement. Employee specifically acknowledges and agrees that he is releasing and giving up any right that he may now have under federal or state law or political subdivision thereof and any claims that he may now have or could have asserted against Employer.

Employee specifically agrees to release all claims that against Employer under many different laws, including but not limited to: *the Age Discrimination in Employment Act, the Older Workers Benefit Protection Act, and Executive Order 11141, which prohibit age discrimination in employment*; Title VII of the Civil Rights Act of 1964, Section 1981 of the Civil Rights Act

of 1866, and Executive Order 11246, which prohibit discrimination based on race, color, national origin, religion, or sex; the Americans with Disabilities Act and Sections 503 and 504 of the Rehabilitation Act of 1973, which prohibit discrimination based on disability; any other federal, state, or local laws prohibiting employment or wage discrimination; the Fair Labor Standards Act of 1938 and state laws that regulate wage and hour matters; the Family and Medical Leave Act of 1993; the Employee Retirement Income Security Act of 1974; any federal, state, or local laws providing workers' compensation benefits, prohibiting retaliatory or wrongful discharge, otherwise restricting an employer's right to terminate employees, or otherwise regulating employment; claims for breach of contract, promissory estoppel, defamation, slander, or libel; claims for termination pay, severance, or other benefits; and any other federal, state, or local tort or contract claim. Employee expressly waives all rights that he might have under any law that is intended to protect him from waiving unknown claims.

Employer hereby irrevocably and unconditionally releases, acquits and discharges Employee from any and all from any and all charges, complaints, claims, liabilities, obligations, promises, agreements, controversies, damages, actions, causes of action, suits, rights, demands, costs, losses, debts and expenses (including attorneys' fees and costs actually incurred), of any nature whatsoever, whether known or unknown, arising out of any act, omission, or event from the beginning of time up to the execution of this Agreement.

5. REFERENCES AND NON-DISPARAGEMENT. If it is necessary for Employer to provide a reference to a prospective employer, Employee agrees that he will direct the prospective employer to contact _____. Additionally, Employee and the elected officials agree that they shall not disparage or make negative comments about each other; provided that this Section shall not apply to comments made to any other governmental entity or as required by law.

6. REPRESENTATIONS AND WARRANTIES. The undersigned parties hereby represent and warrant the following to the other:

a. Employee represents and warrants that: he/she is legally and mentally competent to sign this Agreement; he/she is the sole owner of any claims against the Employer; he/she has the requisite capacity and authority to make this Agreement, and no portion of any existing or potential claims has

been sold, assigned or pledged to any third party; and he/she presently possesses the exclusive right to receive all of the consideration paid in exchange for this Agreement.

b. Employee represents and warrants that he/she has not and will not file any complaints, charges or lawsuits against Employer or any of its past, present and future elected officials, department heads, officers, employees, agents, representatives or attorneys with any governmental agency or any court, including without limitation, any claim or matter of any nature whatsoever related to or arising out of his employment with or separation of his/her employment, except Employee expressly reserves the right to file a claim for unemployment benefits. Employee further agrees to indemnify and hold Employer harmless from any and all loss, costs, damages or expenses, including reasonable attorney fees incurred by Employer, arising out of any claim concerning the separation of employment that may hereafter be made by the Employee or any other party.

c. Employer represents and warrants that it has not and will not file any complaints, charges or lawsuits against Employee with any governmental agency or any court, including without limitation, any claim or matter of any nature whatsoever relating to or arising out of Employee's employment with Employer or the separation of his employment from Employer. Employer further agrees to indemnify and hold the Employee harmless from any and all loss, costs, damages or expenses, including reasonable attorney fees incurred by Employee, arising out of any claim arising from the separation of his employment that may hereafter be made by Employer or any other party.

d. Each party is fully aware of the contents of this Agreement and of its legal effect and understands that it should obtain legal advice regarding this Agreement as they deem appropriate. The parties hereto and each of them, have carefully read this Agreement and know the contents thereof, and they signed the same freely and voluntarily.

e. This Agreement sets forth the entire agreement between the parties and supersedes any and all prior agreements or understandings between the parties pertaining to the subject matter herein. No waiver of a breach of any provision of this Agreement shall be construed to be a waiver of any breach of any other provision of this Agreement or

of any succeeding breach of the same provision. No delay in acting with regard to any breach of any provision of this Agreement shall be construed to be a waiver of such breach. If any provision in this Agreement is found to be unenforceable, all other provisions will remain fully enforceable.

f. No promise or inducement has been made or offered, except as herein expressly set forth, and this Agreement is executed without reliance upon any statement or representation by any of the released parties or their representatives.

g. The language of all parts of this Agreement shall, in all cases, be construed as a whole, according to its fair meaning, and not strictly for or against either party.

h. This Agreement and any amendments hereto may be executed in multiple counterparts by the parties. Each counterpart shall be deemed an original, but all counterparts together shall constitute one and the same instrument

7. JURISDICTION. This Agreement shall be governed by the laws of the State of _____, and the _____ County District Court shall have exclusive jurisdiction of any disputes arising under this Agreement.

8. BINDING EFFECT. This Agreement shall be binding upon and shall accrue to the benefit of the parties hereto, their respective personal representatives, successors in interest and assigns.

9. REVIEW & REVOCATION. The parties acknowledge that Employee may revoke his/her acceptance and execution of this Agreement at any time within seven (7) days of the date of his/her execution of it. Any revocation shall be in writing and shall be effective upon timely receipt by the Employer's Attorney.

If the revocation is submitted by mail, the revocation must be postmarked before the expiration of the seven (7)-day revocation period, and must be sent by overnight mail or other method so that it is received at the above address no later than the next business day immediately following the expiration of the seven (7)-day period. Further, Employee represents that, before accepting and executing this Agreement, he/she was given a review period of twenty-one (21) days in which to consider it. Employee further represents that he/she: (a) took advantage of as much of this period as required to consider this Agreement before signing it; (b)

carefully read the Agreement and the Release included herein; (c) fully understands it; and (d) is entering into it voluntarily. Employee represents that Employer encouraged him/her to discuss this Agreement with an attorney of choice before signing it. This Agreement shall not become effective or enforceable until the seven-day revocation period has expired without Employee having revoked acceptance of it.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the respective dates set forth below and each hereby acknowledge receipt of an executed copy of this Agreement.

On behalf of the Employer of

_____;

Employer

Date

Attested by:

Employer's Representative

Date

On behalf of Employee:

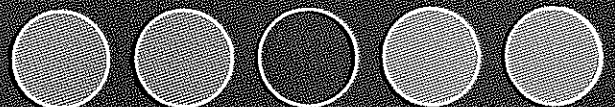
Date

INTERNATIONAL CITY/COUNTY MANAGEMENT ASSOCIATION

ICMA

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Suite 500
Washington, DC 20002-4201
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Beau Falgout

ofalgout13@gmail.com

January 5, 2019

City of Palm Coast
160 Lake Avenue
Palm Coast, FL 32164

Dear City of Palm Coast:

I am writing to express my interest and to apply for the City Manager. I am excited about continuing to work in a dynamic, growing, and innovative organization and City. Palm Coast is not only the place where I have grown professionally, but also a community that my family calls home. I look forward to working with the dedicated team of elected officials, stakeholders, citizens, partners, and staff at the City of Palm Coast to move important priorities and projects forward.

For the past 12 years, I have gained a broad variety of experience in many aspects of municipal operations at the City of Palm Coast. During that time, I have been recognized as a creative and effective leader garnering multiple promotions. I am currently the Interim City Manager and most recently served as the Assistant City Manager. I am proud to lead a premier municipal organization comprised of 9 departments, with 450 full-time, 4 part-time, and 70 seasonal/temporary employees with a budget of \$143.7 million. I believe my experience at the City of Palm Coast sets me apart from other candidates, since I am familiar with the community, organization, and City Councils' goals and objectives.

I have managed complex projects in a team environment and delivered results that exceed expectations. I have managed a wide variety of teams and projects over my career, from leading the \$10 million City Hall project to leading improvements to the City's purchasing and contract management processes that included transition to 100% paperless bidding and contract execution. I managed the State Road 100 Corridor Community Redevelopment Agency with an annual work plan of \$5.4 million while managing the City's multiple housing programs. I served as the Deputy Incident Commander in two major Hurricanes in one year (Hurricane Matthew and Hurricane Irma) and was fully involved in the response and recovery. I believe these examples and my resume show the breadth of my experience.

More importantly, I am dedicated to serving the City of Palm Coast, its citizens, and City staff. As Interim City Manager, I am already leading the team of dedicated staff members in moving the important City Council priorities and projects forward, which are outlined in the candidate profile. I believe my qualifications and experience make me the leading candidate for this opportunity. I look forward to speaking with you about this position further. Thank you for your time and consideration.

Sincerely,

Beau Falgout

Beau Falgout

bfaalgout13@gmail.com

www.linkedin.com/in/bfaalgout

Recognized as a creative and effective leader in multifaceted public sector environments with a variety of stakeholders and challenges. Consistently recognized for an ability to manage teams and complex projects in a team environment and meet or exceed expectations.

Areas of Expertise

*Public Administration
Project Management
Community Development*

*Business Assistance
Employee Development
Housing Programs and Policy*

*Policy Development & Analysis
Media Relations
Legislative Affairs*

Professional Experience

CITY OF PALM COAST — Palm Coast, FL

2/2007 to Present

Palm Coast is a city with a population of 86,516 covering approximately 95 square miles. It is located in Northeast Florida on the Intracoastal Waterway between St. Augustine and Daytona Beach. Palm Coast is a full service City with annual budget of \$156 million. Of note, the City was the fastest growing metropolitan area in the United States from 2000-2010.

Interim City Manager, 9/2018 - Present

Assistant City Manager, 2/2018 - Present

Interim Information Technology Director, 7/2018 - 9/2018

Administrative Services & Economic Development Director, 5/2016 - Present

City Administration Coordinator, 3/2014 to 5/2016

Senior Economic Development Planner, 7/2010 to 3/2014

Senior Planner, 7/2007 to 7/2010

Planner, 2/2007-7/2007

Selected Contributions:

- Named Interim City Manager after the termination of the previous City Manager. Lead a premier City organization comprised of 9 departments, with 450 full-time, 4 part-time, and 70 seasonal/temporary employees with a budget of \$143.7 million.
- As Assistant City Manager, acted as the City Manager in their absence to ensure appropriate coverage of important administrative functions.
- Manage and coordinate complex administrative projects that cross departmental functional responsibilities and/or issues that involve other governmental entities in conjunction with the City Manager and the City Attorney.
- Lead and manage the Administrative Services & Economic Development Department with the functional divisions of the City Clerk, Communications & Marketing, Central Services (Budget, Purchasing, Contract Management), and Innovation and Economic Growth. Department has staffing of 12 full-time employees, an annual operating budget of \$1.9 million, with total budget responsibility of \$13.8 million.
- Served as the Deputy Incident Commander in emergency events. Assisted in managing the City's response and recovery to two major Hurricanes in one year (Hurricane Matthew and Hurricane Irma).
- Consistent presenter to City Council of major policy and project initiatives, especially those involving multiple City departments or other governmental agencies. Developed and guided over 170 agenda items for City Council consideration.
- Created and presented to City Council the plan to build City Hall in the City's new downtown using existing funding sources. In addition, while the City Hall was under construction, negotiated a lease extension with the current landlord by outlining and exploring alternative solutions.
- Led improvements to the City's purchasing and contract management processes that included transition to 100% paperless bidding and contract execution.
- Led a cross-departmental Economic Development Team to develop a City strategic economic development plan, entitled "Prosperity 2021," and implement identified projects. Since development, the local economy's

unemployment rate has dropped from 15.7% in 2010 to 6.1% in 2015. In addition, taxable sales in Palm Coast have risen 28% and bed tax collections have risen 45% during that same period.

- Served as the point person for all economic development projects within the City, including negotiation and management of all economic incentive agreements. Championed the estimated \$40 million Island Walk Redevelopment project and negotiated incentives to ensure this important project moved forward.
- Led the negotiations for the annexation and master planning for over 12,000 acres, consisting of two major projects: Neoga Lakes and Old Brick Township.
- Spearheaded the creation of Airport Area Master Plan, an award winning multi-jurisdictional plan to foster economic development in and around the Flagler Executive Airport.
- Established the City's Business Assistance Center (BAC) through a partnership with the Small Business Development Center at the University of Central Florida to assist existing businesses. Since the BAC was established, the BAC has generated over \$26 million in economic impact to the local economy.
- Advocated for relocating and expanding businesses engaged in the City's various regulatory processes.
- Led a cross-departmental team to develop and launch a new employee development and training program. Through an annual survey, employees express a 76% satisfaction rate with employee development and training.
- Managed the SR 100 Community Redevelopment Agency, led a consultant team to update the Master Redevelopment Plan, helped to secure \$4 million in bond financing, implemented the annual work plan with a budget of \$5.4 million, and acquired numerous private properties for future redevelopment.
- Promoted City interests to both state and federal legislative delegations and lobbyists. Facilitated departments in applying for grants in excess of \$40 million with over \$7 million being awarded.
- Established the City's housing programs, including the Neighborhood Stabilization Program 1 and 3, a Small Cities Community Development Block Grant (CDBG), and the Entitlement CDBG Program. The total grant funding for these programs exceeds \$5 million.
- Frequent and professional interaction with media including television, radio, and newspaper on high profile policy and project initiatives.

ST. JOHNS RIVER WATER MANAGEMENT DISTRICT — Palatka, FL 2/2004 to 1/2007

Independent Planning Consultant, 12/2005 to 1/2007

Policy Analyst Intern, 2/2004 to 12/2005

Selected as an outside self-employed consultant in order to provide technical assistance to local governments after working as an intern. Created technical assistance documents for local governments to use in complying with the updated legislative requirements for linking land use and water supply planning. Completed comprehensive plan and development of regional impact reviews and drafted comment letters.

Education and Training

UNIVERSITY OF FLORIDA — Gainesville, FL

Master of Urban and Regional Planning, all completed except thesis

Bachelor of Science in Business Administration, degree awarded 7/2003

Professional Associations and Continuing Education

American Planning Association Member, member since 2007

Federal Emergency Management Agency

National Incident Management Systems, ICS-100, ICS-200, IS-700

Florida Planning Association, member since 2007

International Economic Development Council, member since 2015

Economic Development Marketing & Attraction Course, 6/2013

Business Retention & Expansion Course, 11/2012

Economic Development Credit Analysis Course, 7/2011

Real Estate Development & Reuse Course, 11/2010

Basic Economic Development Course, 11/2009

International City/County Management Association, member since 2015

Published in PM Magazine, September 2018, *Change the Perception of Local Government*

Florida City/County Management Association, member since 2018

Member, 3/2018 to Present

City Manager Pre-Interview Questionnaire
City of Palm Coast, Florida
Due NLT Monday, February 4th at 11:00 PM CST

Full Name (first, middle, last): Beau Michael Falgout
Nicknames (if any): _____

Please provide your cell, home, and office numbers to facilitate contacting you if needed.

Cell: _____
Home: _____

Please answer each of the following questions completely and thoroughly.

1. How many employees, and what size budgets did you oversee in your last three positions?

In my current position as Interim City Manager, I am responsible for 450 full-time, 4 part-time, and 70 seasonal/temporary employees with a total budget of \$143.7 million. These employees are managed by 8 department heads that report directly to me. As the Assistant City Manager and Administrative Services & Economic Development Director, I managed and continue to manage 12 full-time employees with an operating budget of \$1.9 million and total budget responsibility of \$13.8 million. In addition, I previously served as the Interim Information Technology Director where I managed 12 full-time employees with total budget responsibility of \$5.3 million.

2. Please detail the specific departments you have supervised in your last three positions.

In my current position as Interim City Manager, I manage 9 departments (Administrative Services & Economic Development, Finance, Human Resources, Information Technology, Public Works, Utility, Community Development, Fire, and Parks & Recreation). In addition, the Palm Coast Liaison with the Flagler County Sheriff's Office reports jointly to the Sheriff and me, since police protection is provided through an Interlocal Agreement.

As the Assistant City Manager and Administrative Services & Economic Development Director, I supervised the functional divisions of the City Clerk, Communications & Marketing, Central Services (Budget, Purchasing, Contract Management), and Innovation and Economic Growth.

In addition, I previously served as the Interim Information Technology Director after the separation of the former director. I supervised the functional divisions of operations, applications, and GIS (geographic information science). In addition, I oversaw the enterprise functions of FiberNET and Wireless Communication Towers.

3. Please explain why you left your last three positions.

I left my three previous positions for promotional opportunities within the same organization.

4. Are there any gaps in excess of two weeks in your employment history? If so, please explain in detail.

There are no gaps in excess of two weeks in my employment history.

5. Please describe your experience and skills in strategic planning and visioning? How do you facilitate development of a clear vision for the organization and communicate that vision to all stakeholders?

Prior to being named Assistant City Manager, I served on the City's Strategic Action Plan team and was involved in facilitating City Council in its annual evaluation of the City's strategic plan. Stakeholders and citizens are involved in the process through the City's Annual Citizen Survey, with the results provided to City Council before their annual evaluation process even begins. The City's Strategic Action Plan evaluation process begins with consensus building with City Council to determine the longer term strategic goals and shorter term objectives. City staff then develops approaches and performance measures to further City Council's goals and objectives. Most importantly, the proposed budget developed by City staff is directly tied to City Council's Strategic Action Plan. Throughout the year, City staff and City Council communicate about the progress on those approaches and performance measures. I believe these steps are critical in ensuring that Palm Coast continues to have a clear vision for the organization over the coming years.

6. What do you feel are your greatest strengths as a leader and manager?

I believe my greatest strengths as a leader and manager are focus and humility. As Interim City Manager, I am constantly tuning out the noise and focusing myself and my team on City Council's strategic goals and objectives. This is exactly why every Monday my team huddles to evaluate progress made towards those strategic goals and objectives, identify any obstacles, allocate resources, and most importantly celebrate successes.

The City of Palm Coast organization is greater than any one person, including the City Manager. I am humble to know that there is very little I truly control and it takes a great team to manage the day to day operations and continue to push the envelope to innovate and move this City forward. I aspire to be a servant leader each and every day, where I think first of the citizens and employees before implementing policy or making decisions.

7. What is the most complex project you have coordinated? Describe the steps you took to ensure political, organizational, and community support for the initiative, highlighting specific challenges you faced, and how you overcame them to successfully implement the project.

One of the most complex projects I coordinated during my time at the City of Palm Coast is the Neighborhood Stabilization Program. I had very little experience in managing federal grants or housing programs at that time, but I volunteered to take on this challenge. The City was the epicenter for the housing market collapse and the great

recession with a record number of foreclosures. The Neighborhood Stabilization Program was one way the City tried to mitigate those issues.

The first step I took was to learn as much as possible about the program and requirements. In addition, I reached out and secured partnerships with others more versed in this area, which included Flagler County SHIP Program, Flagler County Association of Realtors, Mid-Florida Housing Partnership, and a contracted grant management firm. Once a plan was developed, several public meetings and City Council meetings were held to ensure community buy-in in order to move forward with the program. The most difficult part of managing the program was the human element, dealing with people who were making one of the biggest, scariest decisions, buying a home. Constant and tactful communication with the partners, lenders, contractors, and home buyers was of most importance.

Through the Neighborhood Stabilization Program and other funding sources, the City was able to secure and invest over \$5 million to help stabilize the local economy. I have to say it was one of the few times I have been hugged in my job and one of my proudest to help families realize their dream of homeownership.

8. Please describe your experience in overseeing the following operations: Water Treatment & Distribution, Wastewater Collection & Treatment, Municipal Stormwater, Street & Traffic Control, and Public Safety (Police & Fire).

I have been overseeing all of these areas through department heads, since my appointment as Interim City Manager. In addition, I have worked on projects with some of these operations and became more familiar with them during my time at the City of Palm Coast. For example, earlier in my career I worked with the Utility Department on their Water Supply Facilities Master Plan, which was a State requirement to ensure available water supply for future growth. In addition, I served as Deputy Incident Commander for the last two hurricanes and became more familiar with the Fire Department, as well as coordinating the City's overall response and recovery efforts.

9. Please describe your experience and skills in municipal financial management, budget development, and capital infrastructure planning, maintenance, and financing. In your response, please highlight any related creative financing strategies you have used to address CIP infrastructure shortfalls.

During my time at the City of Palm Coast, I have been involved in developing and managing budgets for multiple departments. During the last two budget years, I was involved in the development of the overall City budget to better understand the complexity of municipal finance and fund accounting. In addition, I was the lead presenter for the City Hall project, which took creative strategies using multiple funding sources without the benefit of debt financing to construct this major project.

Most recently, our team presented multiple options to move forward with the public works facility project. Ultimately, City Council reached consensus to move forward with temporary measures immediately while laying the groundwork for a more permanent solution considering the limited financial resources.

10. Please describe any experience you may have in assisting your community/organization in advancing voter-referendums to consider financing of proposed municipal capital projects and/or community initiatives? In your response, also indicate the results of any such referendums, including any lessons learned that you would apply in future referendums.

I have not had any experience in assisting a community or organization with a voter-referendum. I do believe any voter-referendum to consider financing of capital projects or community initiatives must be carefully thought out, planned, and communicated. Successful voter-referendums without public discussion and input are generally not successful. In addition, voter-referendums typically are successful when tied to projects that are important to citizens, such as road maintenance/construction, school projects, public safety projects, and parks/open space projects.

11. Please describe your experience with collective bargaining and labor relations, highlighting the types of bargaining groups you have worked with and tell us about any particularly innovative provisions/programs you may have incorporated in previous collective bargaining agreements?

While I have not been directly involved in negotiating with bargaining groups, I do oversee the Human Resources Director who is the City's lead negotiator in collective bargaining agreements. In the past, I have been involved in the City's Employee Academy and Training Team, which was focused on improving the City's training, which is tied to employee development and retention. I believe listening to employee's needs, communicating the organization's needs, and achieving a balance between the two will result in positive labor relations.

12. Please describe your philosophy and approach to building a strong team environment and motivating your employees to perform at their highest levels.

My philosophy and approach to building a strong team environment is ensure I communicate frequently City Council's goals and objectives, so that we all have an understanding of our common purpose. In addition, I spend a lot of time talking to employees about how their job or tasks relate to the bigger picture. For example, I have thanked our parks maintenance crews for being the front line in our economic development goals to expand sports tourism. Without their dedication and attention to details, players, coaches, and parents would not come back year after year and continue to pump money into our local economy. Sharing the greater purpose of someone's job can inspire them to perform at the highest level more so than even additional compensation. At employee orientation, I always tell people you are about to begin one of the few jobs where you can make a difference in someone's day, hopefully a positive one. Whether you are a wastewater operator or a firefighter, we all have the ability to make a positive impact on a citizen's life. This simple philosophy can translate to functional teams as well. If we can agree on our common and greater goal, we can develop trust, clarity in our roles without egos, communicate more effectively, and stay focused on completing the goal.

13. How do you facilitate open and transparent communication with the Mayor & City Council, staff, residents, and other stakeholders?

I am accessible as possible to the Mayor & City Council, staff, residents, and other stakeholders. I try to never turn down an opportunity to speak and listen to residents and stakeholders. Often times, I will return a phone call directly to a resident, or if there is a resident escalating an issue downstairs, I will stop, introduce myself, and listen to their concerns. For City staff, I have an open door policy, and will be starting an out the door policy, which means over the course of a year, I want to try and reach as many employees as possible in their work environment. I intend to start weekly visits to our facilities to interact with as many employees as possible. For City Council, it is important for me to have frequent and honest communication not only about the issues on the agenda, but the issues in the community as well. For any given issue, I will strive to give each City Council member the same set of facts, so they can make the best decision possible.

14. Palm Coast desires to be recognized as a community that encourages development consistent with its evolving vision from a largely residential planned community to a more diverse, mixed-use, residential, commercial, high-tech, and high-skill business center to diversify the City's tax base. Please tell us about any innovative strategies that you have used in your current or previous posts that successfully resulted in increased economic development, including providing some notable examples.

I previously served as the City's economic development point person. During the time I served in that position, the City was striving to stabilize the local economy, since we were the epicenter for the housing market collapse and the great recession. I believe the City was successful in minimizing the impact and recovering quickly by instituting Prosperity 2021, the Neighborhood Stabilization Program, starting the Palm Coast Business Assistance Center, and setting the groundwork for development of our downtown. In addition, I have been part of major projects that either lead to economic development or will lead to additional economic development, including: Island Walk Shopping Center Redevelopment, Neoga Lake Development of Regional Impact, Old Brick Township Development of Regional Impact, and the State Road 100 Community Redevelopment Agency.

Moving forward, I recruited and hired the City's first Head of Innovation and Economic Growth whose sole focus is to help spur innovation and economic growth, especially in our downtown. In less than a year and with City Council support, she has taken considerable steps to that goal, including: creating an Innovation District, securing Opportunity Zone designation, and implementing the Innovation Kick Start Program. Already we are starting to see the benefits with diverse residential projects coming out of the ground, which we most likely be followed by additional commercial and office projects.

As Interim Information Technology Director and Assistant City Manager, I was involved in moving our FiberNET and Wireless Communication Tower programs forward as well. Our team with the direction of City Council, hired experts in their respective fields to help the City better leverage these important assets to assist us in our strategic goals around

innovation and economic growth, and at the same time provide additional revenue to the City.

15. Please tell us about any notable intergovernmental partnership(s) you have developed or played a significant part in their implementation. As part of your answer, highlight any significant challenges that you had to overcome to help make the partnership(s) successful.

Over my time as the City of Palm Coast, I have been involved in many intergovernmental partnerships, including: School Concurrency Interlocal Agreement with multiple entities, SHIP Partnership with Flagler County, Emergency Communications Interlocal Agreement with Flagler County, Airport Area Interlocal Agreement with Flagler County, and resolving the Airport Commons dispute with Flagler County. All of these projects had significant challenges that go along with negotiating with another governmental entity and the multiple interested stakeholders. I believe communication is key to understanding each government entities deal points. Egos should be put to the side. At the end of the day, a good agreement for all parties will be a good agreement for all of the stakeholders and each government entities constituents.

16. What steps and/or processes have you used to track the performance of your organizations? Please include any specific examples involving performance metrics, and how you have communicated organizational efficiencies to the public and/or employees.

Through our Strategic Action Plan process, the City develops and tracks over 500 performance measures to ensure that we meet operational standards and move forward on key City Council initiatives. These performance measures are a great tool to track the progress of our teams, departments, and divisions. Each quarter I meet with teams and departments to go over the performance measures, identify any that are falling behind, better allocate resources, and of course celebrate successes. Heightened scrutiny is given to performance measures that are specifically linked to key City Council goals and objectives. To that end, I meet every Monday with our team to ensure those key City Council goals and objectives stay on target.

17. Palm Coast currently operates FiberNET, a municipal high-speed fiber-optic backbone that connects City sites and facilities. The City's economic development goals include the attraction of dynamic, high-paying technology jobs, bolstered by the enhancement of its fiber network, ideally with the assistance of a new public-private partnership (P3) to help leverage its assets. Please tell us about any municipal fiber experience you may have, as well as any P3 projects you or your organization(s) may have been involved with, highlighting your particular contributions to the development and/or maintenance of such partnerships.

I was very involved with the effort to update the FiberNET Business Plan in coordination with Magellan Advisors. In addition, I became more familiar with the City's FiberNET during my time as Interim Information Technology Director. I am very supportive of the Magellan Advisors recommendation to pursue a P3 partnership to further leverage and

expand the City's FiberNET. I believe the P3 partnership could be the turning point for not only FiberNET, but our downtown and City as a whole.

During the course of my employment, I have been involved in many P3 partnerships and also developed the City's guidelines for P3 projects. Most recently, I negotiated the P3 partnership to allow a local church to construct additional shared parking on one of the City's future park sites. This will reduce the cost of constructing the park for the City in the future, while allowing the church to construct and share the parking area in the future.

18. When we conduct a comprehensive background investigation and reference checks, what will we find that may warrant explanation or that could be of concern to the City of Palm Coast?

Nothing to warrant explanation or concern to the City of Palm Coast. My family does have credit card debt that we are currently paying off, which is typical for the average American family. My wife and I got married, bought our first house, and had our first child in the one year, so needless to say we accumulated some credit card debt during that time.

19. What will we find in an internet search of press coverage that may be controversial or of concern to the City of Palm Coast? Please provide whatever explanation you think is appropriate to help us understand what we will find.

I don't believe there will be any press coverage that would be controversial or of concern to the City of Palm Coast.

20. Are you currently involved in any other searches and what is your status in those searches?

I am currently not involved in any other searches.

21. Please provide a full description of your current compensation and benefits package and your desired compensation and benefits package if you were selected for this position.

As Interim City Manager, I currently have a base salary of \$140,000 with all benefits currently provided to department heads. In addition, the City provides a \$200 per month auto allowance and pays my family's health insurance premium.

My desired compensation and benefits package for this position includes a base salary of \$165,000 with all benefits currently provided to department heads. Comparing Cities in Florida with a population between 75,000 and 100,000, this would make the Palm Coast City Manager the lowest paid City Manager in that group.

In addition, I desire the following additional benefits typical for City Manager packages: City paid premiums for all benefits, City paid maximum contribution to HSA Account (if high deductible plan selected), additional City paid 7% contribution to 457 plan(s), auto allowance of \$400 per month, and cellular data allowance of \$100 per month.

22. If you were selected and offered an acceptable compensation package, what concerns or hesitations do you have that would have to be resolved before you would be ready to accept the position as the next Palm Coast City Manager?

I have no concerns or hesitations, so long as the City is able to provide a mutually acceptable compensation and benefits package.

23. What are the three most important questions you have for Palm Coast Mayor & City Council?

1. What is your vision for Palm Coast in the next five and ten years?
2. How do you see my role in helping accomplish that vision?
3. What is the one challenge or obstacle that could keep us from accomplishing that vision?

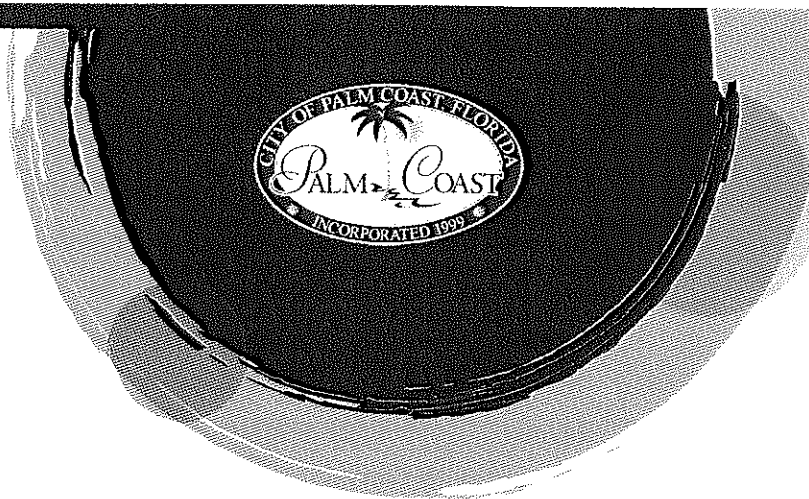
Memo

To: City of Palm Coast City Council

From: Beau Falgout

Re: First Year Game Plan

Date: 2/26/2019



Introduction

I am pleased to submit my First Year Game Plan that I intend to implement should I be selected as the next City Manager for the City of Palm Coast. I have attempted to not only address action items typical for a new City Manager, but also those items related to City Council's Strategic Action Plan (SAP) Priorities and the challenges & opportunities found in the candidate brochure for the position.

My First Year Game Plan is divided into the following sections: 30 days, 60 days, 90 days, 180 days, and 1st year. Items related to a City Council SAP priority are indicated with a ★ symbol. Items related to the challenges & opportunities found in the candidate brochure are indicated with a 📄 symbol. Each section includes a list of action items that would be helpful in understanding my approach in acclimating to my responsibilities as the next City Manager and moving important City Council priorities forward.

First 30 Days: People and Priorities

My first 30 days will be focused on connecting with the people and priorities to help me be successful in my role as the next City Manager. Specifically, I intend to address the following action items:

- Assess Progress on Current City Council's SAP Priorities ★
- One-on-Ones with City Council
- Weekly Check-In with Staff on City Council SAP Priorities ★
- One-on-Ones with Executive Team
- Review Executive Team Evaluations and Goals

- One-on-Ones with Administrative Services & Economic Development Staff
- Mid-Year Reviews with Departments and Teams
- Begin Recruitment for Community Development Director 📄
- Develop Funding Plan for Public Works Campus 📄
- Review 10 Year Capital Improvement Plan 📄
- Connect with Consultant for Request for Solutions for FiberNET Partners ★ 📄
- Assess Progress on Information Technology Initiatives ★
- Target 5 Employee Work Site Visits
- Schedule Partner Meetings
- Schedule Community Outreach Speaking Engagements
- Update Presentation Deck for Speaking Engagements

31 - 60 Days: Engage and Strategize

The next 30 days will be focused on engaging partners and the community, as well as strategizing with City Council on priorities for the coming year. Specifically, I intend to address the following action items:

- Strategize with City Council on New SAP Priorities ★
- Review Progress on Current City Council's SAP Priorities to Ensure Success ★
- Weekly Check-In with Staff on City Council SAP Priorities ★
- Evaluate Organizational Chart and Alignment with City Council SAP Priorities ★
- Evaluate Candidates for Community Development Director 📄
- Develop a Customer Service Vision Statement 📄
- Review Request for Solutions for FiberNET Partners ★ 📄
- Engage and Strategize with Town Center Developer ★ 📄
- Target 5 Employee Work Site Visits
- Target 5 Partner Meetings
- Target 5 Community Outreach Speaking Engagements
- Seek Out Personal Development Opportunities related to Innovation Districts ★ 📄

61 - 90 Days: Plan and Budget

The next 30 days will be focused on planning and budgeted to address the newly adopted City Council priorities along with the City's normal operations for the coming year. Specifically, I intend to address the following action items:

- Review Progress on Current City Council's SAP Priorities to Ensure Success ★
- Weekly Check-In with Staff on City Council SAP Priorities ★
- Finalize Organizational Changes to Better Align with City Council SAP Priorities ★
- Prepare Budget Aligned with City Council SAP Priorities ★ 📄
- Develop Innovation Fund to Provide a Funding Mechanism for Innovation District/Downtown ★ 📄
- Hire Community Development Director 📄
- Schedule Customer Service Training Aligned with Customer Service Vision Statement 📄
- Release Request for Solutions for FiberNET Partners ★ 📄
- Target 5 Employee Work Site Visits
- Target 5 Partner Meetings
- Target 5 Community Outreach Speaking Engagements
- Seek Out Personal Development Opportunities related to Succession Planning ★

91 - 180 Days: Support and Initiate

The next 90 days will be focused on gaining City Council support for the plans and budget necessary to initiate programs and projects in furtherance of the newly adopted City Council SAP Priorities for the coming year. Specifically, I intend to address the following action items:

- Celebrate Success on Completing Current City Council's SAP Priorities ★
- Weekly Check-In with Staff on City Council SAP Priorities ★
- 3rd Quarter Reviews with Departments and Teams
- Seek Support of Proposed Budget Aligned with Newly Adopted City Council SAP Priorities ★
- Initiate Organizational Changes to Better Align with City Council SAP Priorities ★
- Initiate Recognition Program for Staff that Deliver Excellent Customer Service 📄
- Select FiberNET Partner ★ 📄
- Target 10 Employee Work Site Visits

- Target 6 Partner Meetings
- Target 6 Community Outreach Speaking Engagements
- Seek Out Personal Development Opportunities related to Attracting Workforce Talent ★

181 Days - 1st Year: Execute and Evaluate

The remainder of the 1st Year Plan will be focused on executing the budget and plans adopted. In addition, as execution occurs, I will be constantly evaluating and looking for opportunities and challenges that may arise. Specifically, I intend to address the following action items:

- Review Progress on Newly Adopted City Council's SAP Priorities to Ensure Success ★
- One-on-Ones with City Council to Evaluate Progress
- Weekly Check-In with Staff on City Council SAP Priorities ★
- One-on-Ones with Executive Team to Evaluate Progress
- End of Year Reviews with Departments and Teams
- Execute Proposed Budget Aligned with Newly Adopted City Council SAP Priorities ★
- Execute Organizational Changes Aligned with City Council SAP Priorities ★
- Implement Innovation Fund for Innovation District/Downtown ★ 📄
- Hold Customer Service Training Aligned with Customer Service Vision Statement 📄
- Evaluate Customer Service Feedback and Adjust Accordingly 📄
- Implement Funding Plan for Public Works Campus 📄
- Contract with Selected FiberNET Partner ★ 📄
- Assess Progress on Information Technology Initiatives ★
- Target 20 Employee Work Site Visits
- Target 12 Partner Meetings
- Target 12 Community Outreach Speaking Engagements
- Seek Out Personal Development Opportunities related to Developing Leaders ★

MANAGEMENT PROFILE



Beau Falgout

Sunday, February 24, 2019

This report is provided by:

Strategic Government Resources, Inc.
PO Box 1642
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www.GovernmentResource.com



WILEY

INTRODUCTION TO DiSC®

Welcome to Everything DiSC®

Beau, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on challenging assumptions and ensuring accurate outcomes.

Or, maybe you're more comfortable working with those who take an efficient approach than those who always seem to want everyone involved in decisions.

Or, perhaps you relate best to people who are naturally more skeptical than accepting.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

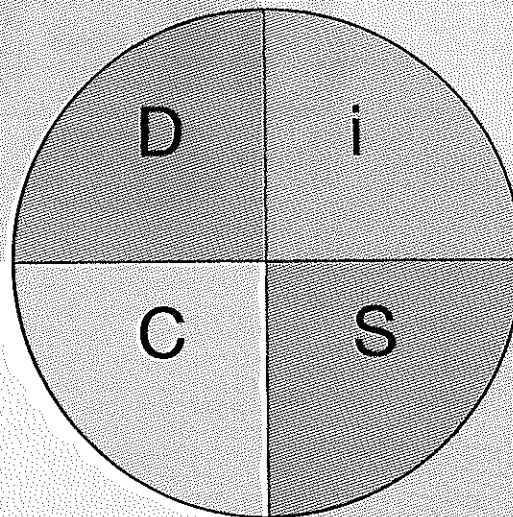
- ▶ All DiSC styles are **equally valuable**, and people with all styles can be effective managers.
- ▶ Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- ▶ **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- ▶ Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- ▶ You can improve the quality of your management experience by using DiSC to build more **effective relationships**.

DOMINANCE

- Direct
- Results-oriented
- Firm
- Strong-willed
- Forceful

INFLUENCE

- Outgoing
- Enthusiastic
- Optimistic
- High-spirited
- Lively



- Analytical
- Reserved
- Precise
- Private
- Systematic

- Even-tempered
- Accommodating
- Patient
- Humble
- Tactful

CONSCIENTIOUSNESS

STEADINESS

YOUR DiSC® OVERVIEW

How is this report personalized to you, Beau?

In order to get the most out of your *Everything DiSC Management® Profile*, you'll need to understand your personal map.

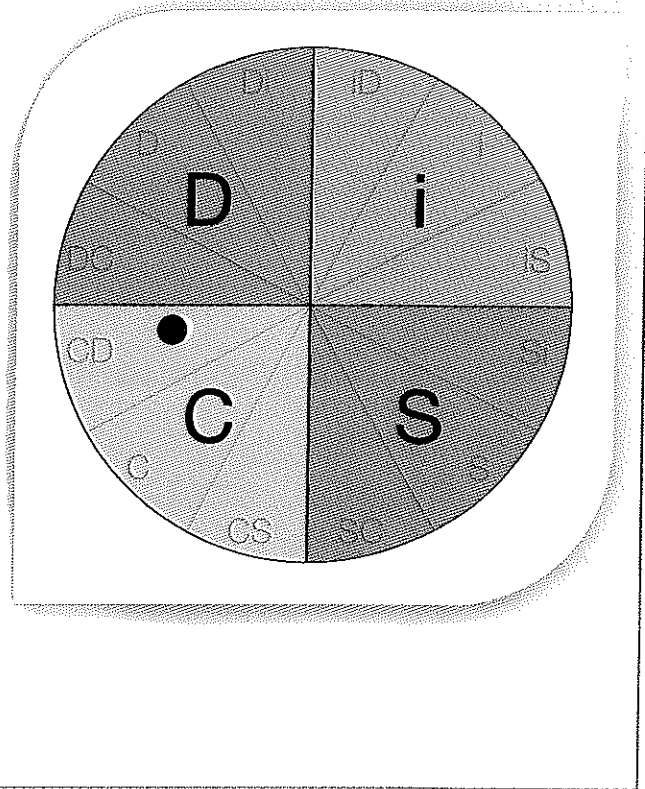
Your Dot

As you saw on the previous page, the Everything DiSC® model is made up of four basic styles: D, i, S, and C. Each style is divided into three regions. The picture to the right illustrates the 12 different regions where a person's dot might be located.

Your DiSC® Style: CD

Your dot location indicates your DiSC style. Because your dot is located in the C region but is also near the line that borders the D region, you have a CD style.

Keep in mind that everyone is a blend of all four styles, but most people tend strongly toward one or two styles. Whether your dot is in the center of one style or in a region that borders two, **no dot location is better than another**. All DiSC® styles are equal and valuable in their own ways.



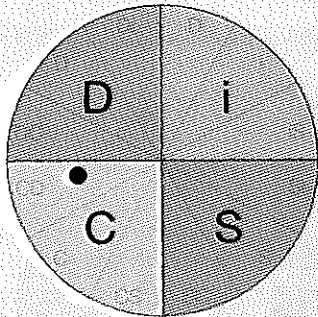
Close to the Edge or Close to the Center?

A dot's **distance from the edge** of the circle shows how naturally inclined a person is to encompass the characteristics of his or her DiSC style. A dot positioned toward the edge of the circle indicates a strong inclination toward the characteristics of the style. A dot located between the edge and the center of the circle indicates a moderate inclination. And a dot positioned close to the center of the circle indicates a slight inclination. A dot in the center of the circle is no better than one on the edge, and vice versa. Your dot location is about halfway between the edge of the circle and the center, so you are **moderately inclined** and probably relate fairly well to the characteristics associated with the CD style.

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

Your Dot Tells a Story

Your DISC Style Is: CD



Because you have a CD style, Beau, you probably take an efficient, no-nonsense approach to management. You're likely to have high expectations for yourself and others. Since you value expertise, people who consistently demonstrate competence are most likely to gain your respect. And because you want to reach superior results efficiently, you work to balance speed and quality.

In your desire to control outcomes, you may sometimes struggle to share responsibility, and it can be difficult for you to depend too heavily on others. You probably avoid disorganized people and nonessential meetings. At times, you may be tempted to just take charge of projects and finish them your own way.

Like others with the CD style, you often avoid showing emotion, especially in social situations. In fact, you may come across as difficult to read when you first meet someone. Perhaps you're simply sizing up the situation, but your reserve may seem unfriendly to people who are more outgoing.

In terms of time management, you like to maintain an efficient schedule, and you may become frustrated by deadlines that don't allow you to produce top work. In fact, you probably become irritated with people who waste time or do things at the last minute.

Most likely, you analyze problems before reaching a decision. And, you're probably not afraid to be straightforward or even blunt with your opinions because you're unwilling to compromise what you see as the truth. When things don't go as you think they should, you may struggle to contain your disapproval. Furthermore, you tend to project confidence in your ideas, and you may become frustrated when others seem less decisive.

You generally pride yourself on your ability to face challenges head-on. When you've set a goal, you're not easily swayed by obstacles or disapproval from others. And because you tend to be skeptical, you may foresee problems that others miss. But this focus on problems may cause you to come across as dissatisfied. Others may find this intimidating, and they may be less likely to suggest new ideas to you for fear of rejection.

Like other managers with the CD style, you probably don't enjoy conflict, but you're unlikely to let it stop you from doing what you think is right. You may have a bit of a stubborn streak, and if someone challenges you, you may dig in your heels even further. When situations escalate, you sometimes overlook social niceties or let your tone or body language express your disapproval.

Although you pride yourself on the quality of your work, you usually avoid public recognition. If you receive praise that seems overly emotional, you may question its validity. And assuming that others share this preference, it may not occur to you that the people you manage may want more open praise or compliments from you.

Beau, like others with the CD style, your most valuable contributions as a manager may include your problem-solving skills, your high standards, and your determination. In fact, these are probably some of the qualities that others admire most about you.

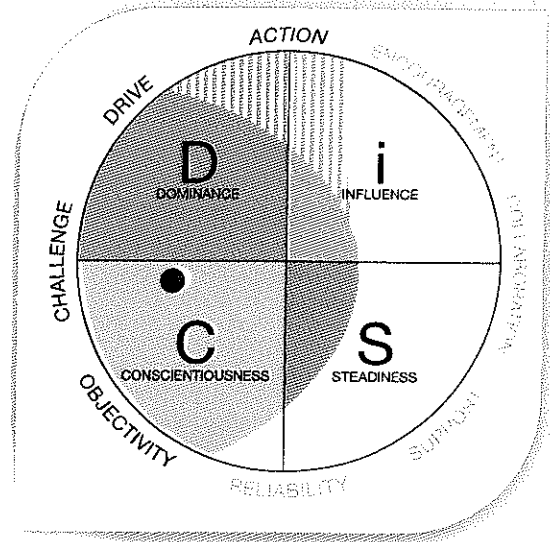
YOUR DISC[®] PRIORITIES & SHADING

Your Shading Expands the Story

Beau, while your dot location and your DiSC[®] style can say a great deal about you, your map **shading** is also important.

The eight words around the Everything DiSC map are what we call **priorities**, or the primary areas where people focus their energy. The closer your shading comes to a priority, the more likely you are to focus your energy on that area. Everyone has at least three priorities, and sometimes people have four or five. **Having five priorities is no better than having three, and vice versa.**

Typically, people with your style have shading that touches **Challenge, Objectivity, and Drive**. Your shading stretches to include **Action**, which isn't characteristic of your style.



What Priorities Shape *Your* Management Experience?

► Offering Challenge

Beau, like other managers with the CD style, you may point out flaws that others have missed or openly question people's opinions if you're unconvinced. Because you tend to be skeptical, you may show irritation with methods that lack common sense, and you probably expect others to take a similarly critical approach. Most likely, you aren't afraid to challenge processes or plans in order to ensure efficient outcomes.

► Ensuring Objectivity

You typically provide a solid basis of reason and evidence for your decisions. Because you want to ensure quality results, you focus on analyzing options and strive to separate emotions from facts. Most likely, you won't settle for sloppy, subpar work, and you may expect people to adhere to your high standards. Overall, you focus on providing objectivity to ensure outcomes that are both fair and accurate.

► Displaying Drive

Managers with the CD style tend to be goal-oriented and focused on the bottom line, so you may encourage team members to share this focus on accomplishment. You're interested in getting things done, and your persistence is usually very clear to the people you manage. In fact, you may become openly frustrated if progress is stalled. You prioritize getting results and the drive it takes to cross the finish line.

► Taking Action

Also, you appear to place a high value on swift, immediate progress, a characteristic that is unusual for someone with the CD style. You probably prefer to take command of situations and hit the ground running. Once you've chosen a course of action, you tend to keep moving forward while pushing your team members to keep up with your rapid pace.

YOUR MANAGEMENT PREFERENCES

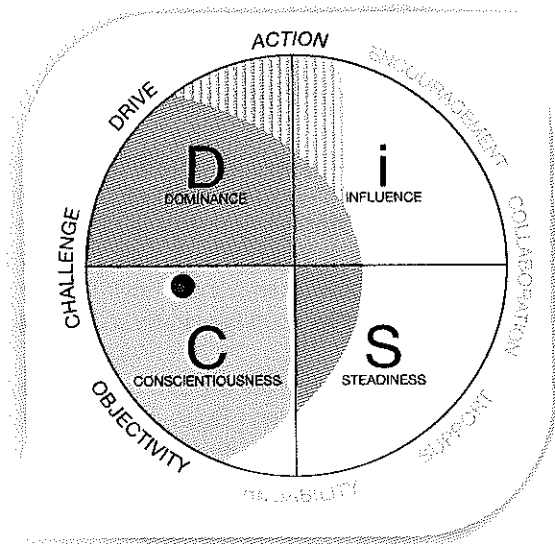
What Do You Enjoy About Managing?

Different people find different aspects of their work motivating. Like other people with the CD style, you may enjoy that managing allows you to ensure high-quality results and logical solutions. In addition, as you take charge of situations, you may appreciate that you're able to provide a reasoned, balanced perspective. Furthermore, you may also appreciate creating a fast-paced environment where progress happens quickly, and this is less typical of the CD style.

You probably enjoy many of the following aspects of your work:

MOTIVATORS

- Catching errors or flaws in design
- Providing analysis
- Setting high standards
- Working toward a challenging goal
- Improving upon others' ideas
- Solving problems
- Achieving results
- Keeping things moving
- Initiating change



What do your priorities say about what motivates you and what you find stressful?

What Drains Your Energy as a Manager?

Then there are those management responsibilities that are stressful for you. Because you tend to focus on logical objectives and concrete results, you may find it frustrating to manage people who don't meet your standards of competency. Similarly, it's also probably stressful when you don't feel you have the expertise to deliver expected results or others seem to be questioning the quality of your work. At the same time, unlike others with the CD style, you may become frustrated if people fail to move as quickly as you'd like.

Many of the following aspects of your work may be stressful for you:

STRESSORS

- Dealing with people who don't meet your standards
- Being wrong
- Managing inefficient procedures
- Dealing with challenges to your authority
- Managing conflict
- Adjusting your goals to meet the needs of others
- Managing overly emotional or illogical people
- Having to moderate your pace
- Being forced to give up on bold ideas

YOUR DIRECTING & DELEGATING STYLE

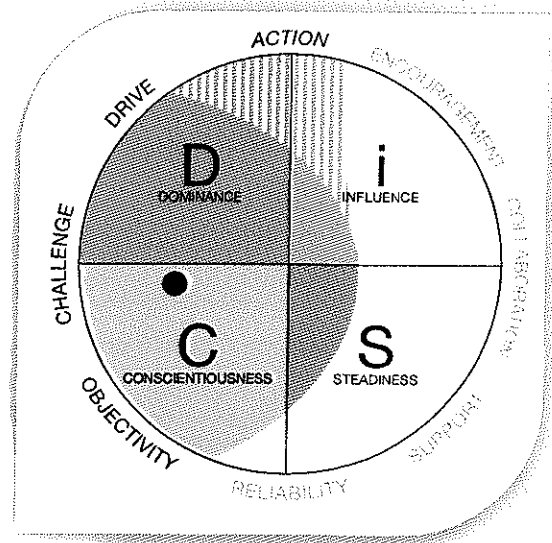
As a manager, you may find that effectively directing and delegating to your employees is more complex than simply handing off an assignment with a “please” and “thank you.” Perhaps you’ve noticed that individual employees respond positively to different types of instruction and feedback. Some want specific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

Beau, you tend to **challenge people to meet your high standards**. At times, you may be skeptical of whether they can complete assignments to your satisfaction, prompting you to remind them of their responsibilities. Those who underperform are likely to receive matter-of-fact feedback from you.

You also **prioritize objectivity** and probably take a somewhat formal approach to directing people. Most likely, you lay out your expectations in a logical manner and then monitor progress closely to ensure accurate outcomes.

Because you have a **strong drive for results**, you tend to push your team members to produce quality solutions. For this reason, you usually delegate responsibilities based on the person’s competency and how he or she could contribute to the bottom line.

Furthermore, you have a **preference for action**, which isn’t typical for someone with the CD style. You want to get going quickly and usually direct people by instilling a sense of urgency.



How Do You Approach Directing & Delegating?

STRENGTHS

- Setting high standards
- Evaluating people based on their competency
- Emphasizing the importance of accuracy in ensuring quality outcomes
- Ensuring that people understand the need for results
- Explaining your ideas in logical terms
- Getting people moving

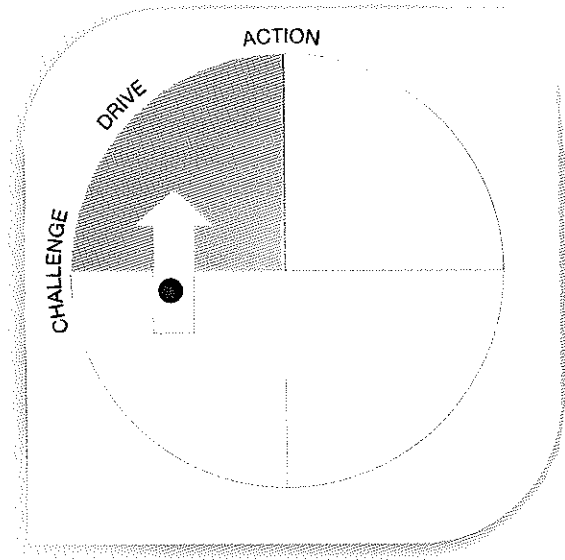
CHALLENGES

- Offering ongoing encouragement
- Sharing positive emotion, which could boost morale
- Highlighting the importance of routine tasks
- Creating a reliable setting
- Listening to people’s concerns about assignments
- Considering the needs of others

DIRECTING & DELEGATING TO THE D STYLE

How Does the D Style Like to Work?

Like you, people with the D style prioritize the bottom line and are driven to get results. Because they share your preference for independence, they probably require very little hand-holding. In fact, they want the freedom to make decisions without having to ask for input from others. Furthermore, these individuals tend to display a great deal of initiative and will likely accept as much responsibility as you're willing to give them. However, they are less likely than you to analyze options logically, preferring instead to simply dive right in.



Potential Problems When Working Together

Like you, people with the D style tend to be questioning and skeptical. They're unlikely to simply follow orders, so they may challenge your authority if they disagree with your opinions. As a result, you may get into power struggles with them, and they may want to make important decisions without consulting you. These individuals may assume they know how to do things better than anyone else and take shortcuts that you disagree with. This can lead to tension or conflict, as neither of you is likely to back down quickly.

How to Be Effective with the D Style

People with the D style are fast-paced, and unlike others with the CD style, you also prioritize action. Like you, they want to make quick progress while working on exciting projects. However, they may grow restless if your tendency to do a thorough analysis impedes innovation. Therefore, give them some autonomy and allow them to undertake more adventurous tasks. If they have exhibited sound judgment in the past, show respect for their bold ideas and decision-making ability. If they are inexperienced, remember that they may try to make decisions that exceed their qualifications.

If they're less experienced:

- Don't confuse confidence with competence.
- Review their plans in detail.
- Establish agreement about the type of decisions that will be left to them.
- Have them check with you before any risky decisions are made.
- Let them know that they will be given more autonomy as they gain experience.

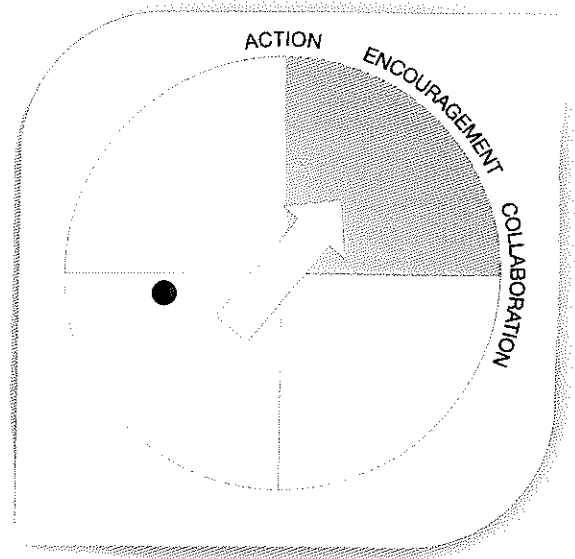
If they're more experienced:

- Make sure you see eye to eye on the goal of the assignment.
- Provide a broad overview rather than detailed tasks.
- Set a deadline and let them figure out how to proceed.
- Make sure they understand the consequences of their shortcuts.
- Specify the limits of their authority while still allowing for some autonomy.

DIRECTING & DELEGATING TO THE i STYLE

How Does the i Style Like to Work?

People with the i style tend to be upbeat and optimistic. They'll often focus on the positive possibilities of a task rather than the potential downside, which is contrary to your natural sense of skepticism. Furthermore, because these individuals tend to rely on open expression and enthusiasm, they may desire more recognition than you are naturally inclined to give. These individuals place less of a priority on logic and bottom-line results than you do.



Potential Problems When Working Together

People with the i style want to work in a fun environment, so they may spend more time socializing and networking than you think is necessary. They value personal feelings and are probably more willing to accept people at face value than you are. Because they prefer to collaborate with others, they may not understand your preference to work independently. In fact, they may become distressed if their assignments require working alone.

How to Be Effective with the i Style

These individuals are action-oriented and spontaneous, and unlike others with the CD style, you share their tendency to move at a fast pace. They want to get the gist of an assignment and dive right in, so they may be well-suited to projects that require quick thinking. As a result, your ability to keep track of the specifics may provide the structure they need to perform. Allow those with experience to be creative as long as you're satisfied with the results. For those with less experience, provide guidance to help them meet deadlines.

If they're less experienced:

- Let them collaborate when possible.
- Hold them accountable for missed deadlines or skipped steps.
- Help them prioritize.
- Ensure that they follow through on their tasks.
- Check their understanding since their enthusiasm might hide a lack of clarity.

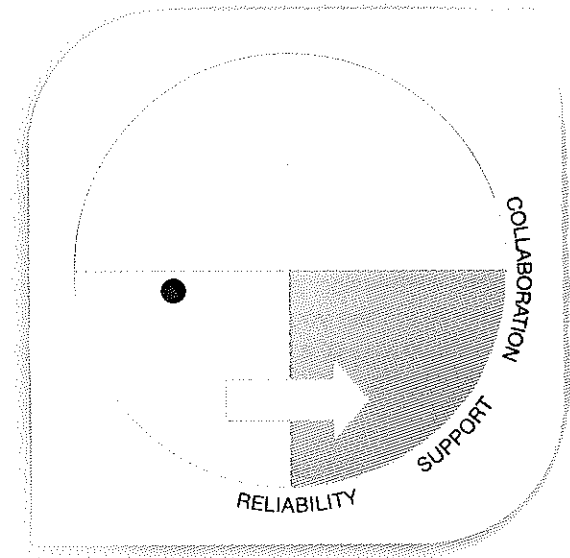
If they're more experienced:

- Allow them to take the lead in group settings.
- Make time to review the details with them.
- Acknowledge their contributions publicly.
- Keep them on track and on schedule, but don't micromanage their work.
- Be open-minded to their more adventurous ideas.

DIRECTING & DELEGATING TO THE S STYLE

How Does the S Style Like to Work?

People with the S style are accommodating and flexible. Because they're usually less skeptical of ideas and people than you are, they may seem relatively easy to direct. Still, they probably need more support and interaction than you naturally provide. And because they may be hesitant to speak up or assert themselves, your objective approach may intimidate and prevent them from asking questions or offering suggestions. As a result, it may be difficult for you to identify when they're ready for new challenges.



Potential Problems When Working Together

These individuals appreciate a methodical pace and like to focus on their tasks without being interrupted by sudden changes or radical developments. They're cautious when approaching projects and want to know what is expected of them so they can minimize ambiguity or major surprises. However, because they may not share your drive for individual achievement, you may grow impatient with them. At the same time, your willingness to challenge established ideas may strike them as critical or argumentative.

How to Be Effective with the S Style

People with the S style may be most comfortable in friendly, cooperative environments. Unlike you, they tend to enjoy collaborative settings and group efforts, so they'll appreciate opportunities to contribute within a unified team. Be straightforward about your expectations for their performance while providing step-by-step guidance. If they have more experience, give them as much responsibility as you can, but make it clear that you are available for clarification or to advise them if they face tough decisions.

If they're less experienced:

- Give clear, step-by-step directions.
- Ask questions to confirm their understanding.
- Check in with them frequently to increase their comfort.
- Refrain from giving them too much responsibility before they're ready.
- Avoid overriding their decisions whenever possible.

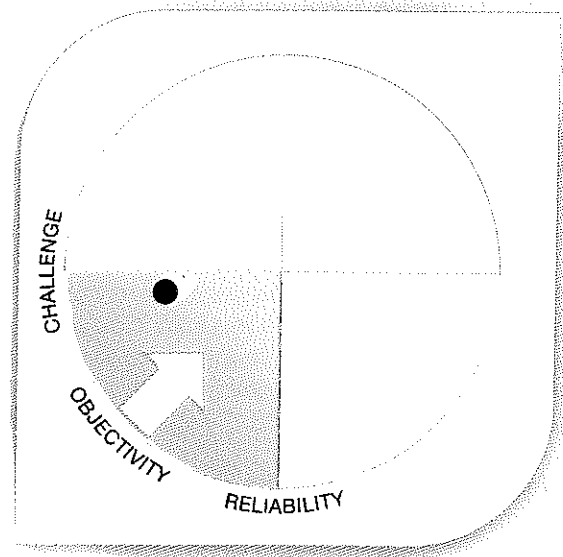
If they're more experienced:

- Ask for their input rather than just telling them what to do.
- Give them additional responsibilities when they seem ready for more challenges.
- Urge them to take initiative.
- Ask them directly what kind of support they need.
- Encourage them to help structure the overall plan.

DIRECTING & DELEGATING TO THE C STYLE

How Does the C Style Like to Work?

Like you, people with the C style relate best to clear objectives and fact-based ideas. They like to analyze their options carefully, and because of their focus on accuracy, they prefer to work systematically toward their goals. They're less interested in the social and emotional aspects of the job, which you can probably relate to. Furthermore, these individuals are comfortable working alone, requiring minimal face time. They prefer to be given a task and allowed the time and space to complete it.



Potential Problems When Working Together

These individuals want to produce dependable outcomes, so they tend to thoroughly consider all the consequences before choosing a plan. Although you share their desire to analyze options logically, you're probably also concerned about reaching decisions efficiently. As a result, you may show some impatience when they spend too much time weighing the consequences and second-guessing plans. In turn, they may become frustrated if you pressure them to rush their efforts.

How to Be Effective with the C Style

Like you, people with the C style are interested in creating quality work and prefer environments where they feel free to point out flaws and question inefficiencies. They don't look for reassurance or support, but they do want to know that their expertise and competence are valued. If they feel you are criticizing their performance, they may withdraw or become passive-aggressive. Be sure they don't spend too much time perfecting their work, and if they have more experience, let them know that their suggestions are heard and respected.

If they're less experienced:

- Allow them to work independently whenever possible.
- Help them achieve quality without putting deadlines at risk.
- Make sure they have the resources they need.
- Check in to make sure they aren't getting bogged down.
- Point out the logical basis behind the task.

If they're more experienced:

- Check in with them enough to ensure clarity and forward progress.
- Listen to their concerns about quality.
- Encourage them to point out defects in the overall plan.
- Allow them to work independently, but set clear deadlines.
- Give them opportunities to help solve complex issues.

MOTIVATION AND THE ENVIRONMENT YOU CREATE

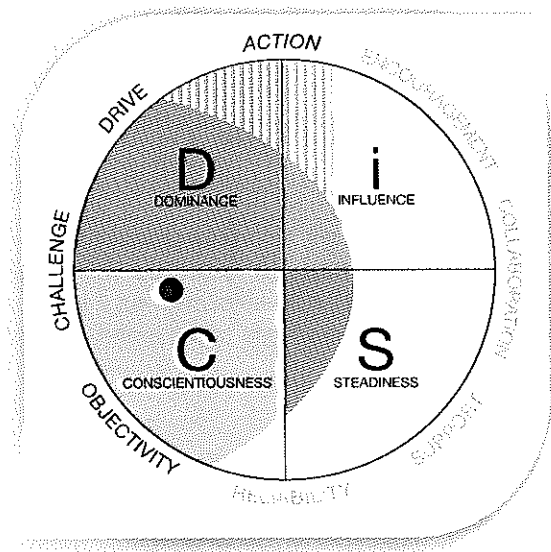
You can't motivate people. They have to motivate themselves. As a manager, however, you can create an environment where it's easy for people to find their own natural motivation. This means building an atmosphere that addresses employees' basic needs and preferences so they can do their best work, and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

Beau, you constantly **challenge your organization to become more efficient** by identifying redundancies and poor use of resources. In this climate, people strive to use their time wisely and help create new best practices, knowing that you hold them accountable to the same quality standards that you model.

Similarly, your **preference for objectivity** means that you create an environment where logic and rational thought are prized. Many people are motivated when they are asked to create commonsense solutions, and your focus on analysis and accuracy encourages them to demonstrate critical thinking skills.

By **driving toward results**, you remind others that efficient processes lead to superior outcomes. The people you manage know that you respect persistence and ambition, and they seek to impress you by meeting benchmarks and goals in a timely manner.

Furthermore, unlike others with the CD style, you have an extra priority that may influence motivation and the environment you create. Your **preference for action** may be contagious, energizing and empowering the people you manage.



The Environment You Create

- When you challenge people, they push themselves harder.
- Because you are objective, people strive to make rational decisions that are likely to win your approval.
- Your focus on accuracy may help ensure that people catch mistakes quickly.
- When you set clear goals, people understand what is expected of them.
- Your systematic approach helps provide a structured workplace with commonsense policies.
- Because you emphasize action, people feel a sense of urgency.

MOTIVATION AND THE D STYLE

What Are the Motivational Needs of the D Style?

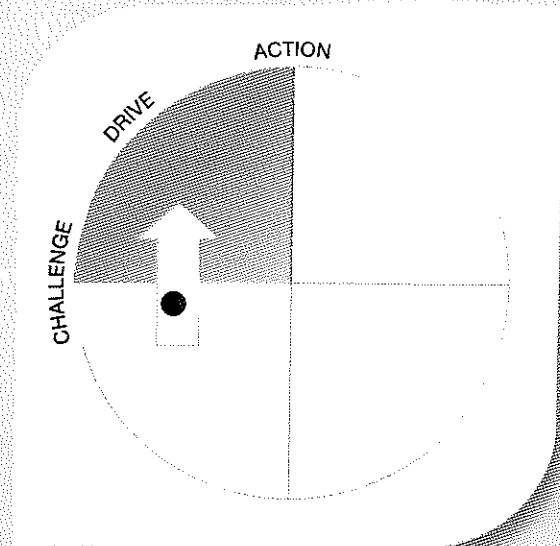
Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. Like you, they're driven to achieve, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, they share your desire to move quickly and want to make a big impact with innovative or daring ideas. In fact, because they're so focused on individual career growth, they will probably feel empowered to meet the challenging expectations you tend to place on them.

What **demotivates** the D style?

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

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

- Employees with this style may embrace conflict as a way to create win-lose situations.
- They may be energized by the competitive aspects of conflict.
- They may waste energy dwelling on who is at fault.



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

- Avoid stepping in or overruling their decisions unless absolutely necessary.
- Provide basic parameters, leaving room for some creative freedom.
- Fuel their competitiveness by turning routine projects into competitions.
- Provide opportunities for them to gain the respect of others in the organization.
- Introduce new projects by outlining their big-picture purpose before giving any details.
- Allow them to use new methods whenever possible, rather than insisting on the status quo.

What's the best way for you to **recognize and reward** the D style?

- Reward them with more autonomy when they exceed your expectations for quality.
- Praise them with direct compliments that describe the impact of their performance.
- Acknowledge their ideas and give them credit for their work that positively affects the bottom line.
- Recommend them for advancement once they've proven they are ready for more challenges.

MOTIVATION AND THE i STYLE

What Are the Motivational Needs of the i Style?

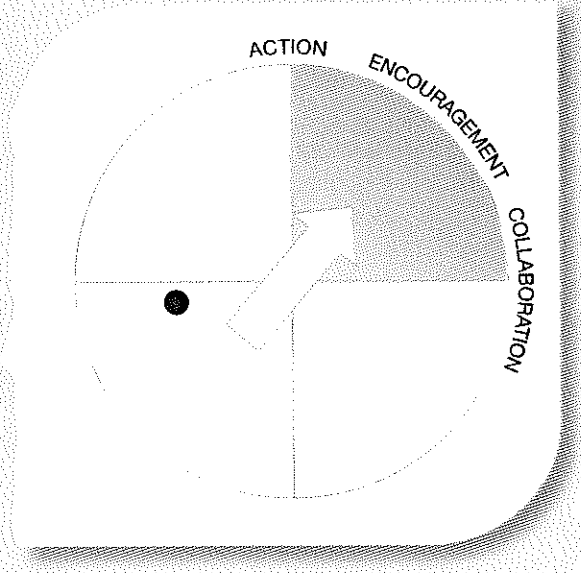
Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. Unlike you, they're eager to collaborate, so they may put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they often move quickly and indulge in a variety of tasks, and you probably don't have much trouble keeping up with their fast pace. Those with the i style are also motivated by public recognition and appreciate a warm and encouraging environment, probably more so than you.

What **demotivates** the i style?

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

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

- Conflict may make them emotional or angry, and as a result may negatively affect their performance.
- They may take conflict personally, which could de-energize them.
- They may dwell on the conflict rather than focus on their tasks.



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

- Refrain from being blunt when delivering negative feedback.
- Be open to their adventurous ideas.
- Let them collaborate with others.
- Limit the predictability and routine of their tasks when possible.
- Acknowledge their feelings and individuality.
- Give them opportunities to express themselves and be in the limelight.

What's the best way for you to **recognize and reward** the i style?

- Show enthusiasm for work that meets your high standards by praising them publicly.
- Let them know when others compliment their work.
- Acknowledge how their social and energetic approach complements your more systematic style.
- Recognize strong performance by providing opportunities to network and build relationships.

MOTIVATION AND THE S STYLE

What Are the Motivational Needs of the S Style?

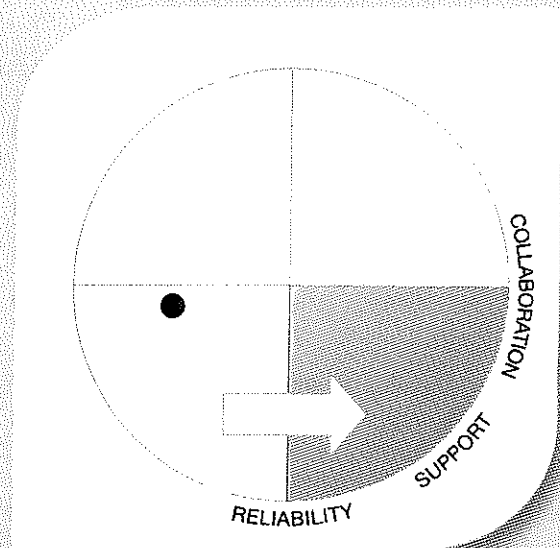
People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. They want to be supportive of people, and may even withhold their own opinions to accommodate the needs of others, which is a tendency you may not identify with. In addition, they like to connect with colleagues on a personal level, and they may value working in a collaborative setting more than you do. Furthermore, they want to be seen as reliable and to have enough time to perform their duties without being rushed or stressed, which probably isn't as important to you.

What demotivates the S style?

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

How does conflict affect the motivation of the S style?

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



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

- Find opportunities for them to collaborate with others.
- When communicating, take their feelings into account rather than relying primarily on logic.
- Provide the information and resources they need to do their best work.
- Give them plenty of warning when changes are coming.
- Give them the structure and security they need to feel comfortable.
- Ask for their ideas, which they might not share without encouragement.

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

- Provide regular reassurance that they're meeting your high standards, even if it seems obvious to you.
- Give warm and sincere praise in a one-on-one setting.
- Acknowledge how their steadiness and supportiveness contribute to everyone's success.
- Propose advancement opportunities when they consistently exceed your expectations in their current role.

MOTIVATION AND THE C STYLE

What Are the Motivational Needs of the C Style?

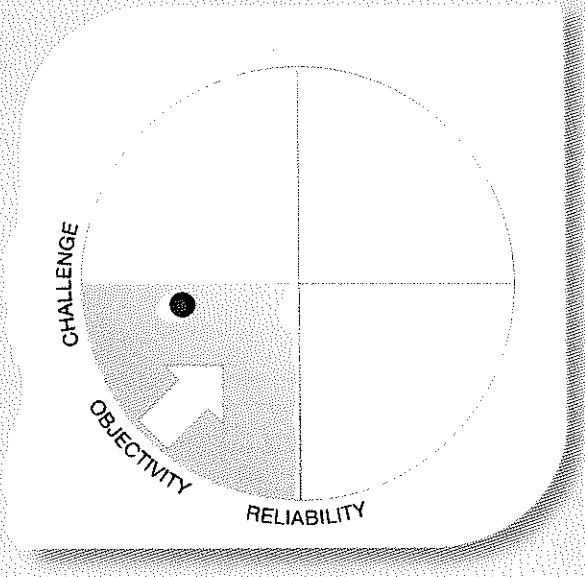
Employees with the C style look for an environment where they will have time to analyze ideas and ensure flawless outcomes. They want to produce work that's reliable, so they prefer to maintain a moderate pace and exercise a sense of caution, which isn't one of your top priorities. Because they share your objective outlook, they like to weigh the options and gather all the facts before making decisions. Also, they want to master their responsibilities, so like you, they often question ideas and challenge assumptions to ensure accuracy.

What **demotivates** the C style?

- Being required to work collaboratively
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Having to make quick decisions
- Being wrong

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

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



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

- Explain the purpose of tasks and assignments logically.
- Allow them to help define quality standards.
- Listen to their questions about projects or tasks, but keep them moving forward.
- Provide opportunities for independent work, but make sure they collaborate when needed.
- Give them time to make decisions, but make sure they don't get bogged down.
- Give them challenging projects they can sink their teeth into.

What's the best way for you to **recognize and reward** the C style?

- Praise them in a one-on-one setting and cite objective examples of excellence.
- Point out specific ways in which they contribute to high-quality results.
- Show your respect for their competence by allowing increased autonomy.
- Reward quality work by providing new opportunities to build on their expertise.

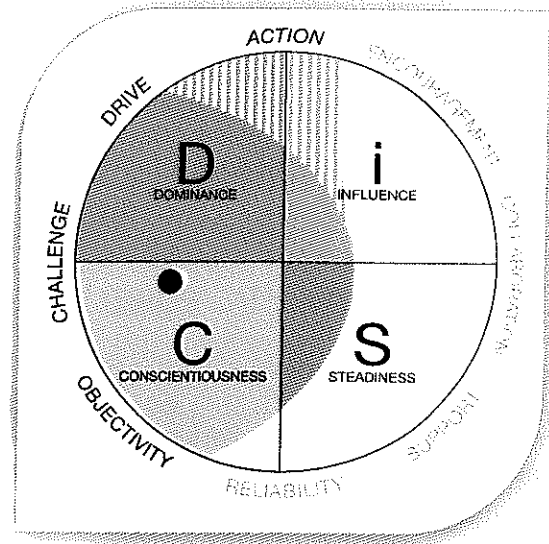
YOUR APPROACH TO DEVELOPING OTHERS

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

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

Beau, when managing people, you hold them to the same high-quality standards that you expect of yourself. Most likely, you view employee development as a welcome challenge that, when done successfully, will yield the best qualities and skills your team has to offer. By taking an objective look at what people do well and what they struggle with, you're able to match people's abilities with the organization's needs. And because you believe development is synonymous with achieving goals, you may push people to think critically and sharpen their skills. Overall, your demanding, practical approach may help the people you manage harness their hidden strengths.

Furthermore, unlike others with the CD style, you also have an extra priority that might influence your approach to developing others. Your action-oriented nature may motivate people to pursue their goals with energy and immediacy.



Your Development Approach

ADVANTAGES

- Creating detailed development plans
- Providing people a realistic appraisal of their skills
- Helping people objectively identify their strengths and challenges
- Pushing others to hone their skills
- Giving feedback in a clear, straightforward manner
- Pushing people to move quickly in their development

DISADVANTAGES

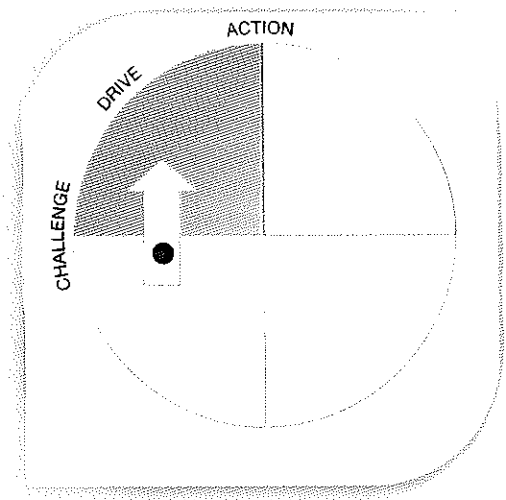
- Appearing to focus more on the organization than other individuals
- Dismissing people's interests
- Focusing on flaws rather than strengths
- Causing people to worry that you are dissatisfied with their work
- Coming across as more concerned with the organization than with individuals
- Pushing people at a pace that is too fast for them

DEVELOPING YOUR "D" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Drive

Like you, people with the D style are driven to succeed, but you may need to reassess their course from time to time. They are inclined to strive for personal goals, sometimes at the expense of the organization's needs. Be prepared to rein them in when they have too much on their plate to be effective.

- Explain how success for the team could lead to development opportunities for them.
- Encourage their ambition and autonomy but be prepared to redirect their focus.
- Enable them to create new opportunities and competitive challenges for themselves.

Action

Like you, these individuals like to make things happen quickly, which is more typical of the D style than the CD style. When making decisions, they tend to skip the analysis that you rely on. Reassure them that you also seek forward momentum, but temper it with a thoughtful and well-paced development plan.

- When making long-term development plans, lay out milestones and concrete benefits.
- When discussing an opportunity, explain how it will immediately benefit them.
- Consider their need to keep moving when devising development opportunities.

Challenge

People with the D style seek autonomy and control, as you probably do. When they choose an idea, it may be difficult to convince them otherwise, and this could lead to power struggles when you work with them on development plans. If you can maintain your authority while respecting their independence, they may listen to your logic.

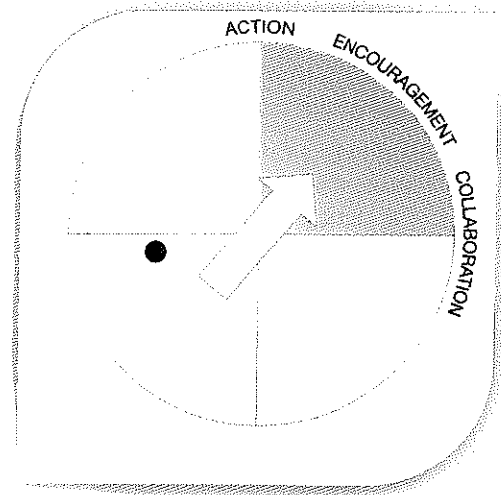
- Let them work independently, but help them see the value of multiple perspectives.
- Be direct about what's working for them and what's not, putting it in terms of results.
- Give them opportunities to exercise authority.

DEVELOPING YOUR “I” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Encouragement

People with the i style enjoy the limelight, while you prefer to work under the radar. They respond well to feedback that is positive and personal, and this may be out of your comfort zone. At the very least, be mindful not to be too cold with them, and try to offset your questions with some affirmations.

- Strike a balance by delivering fact-based feedback while maintaining a friendly demeanor.
- Try to be warm when discussing development opportunities with them.
- Show optimism about their potential.

Action

While it's more typical for the i style than the CD style, you're both interested in fast-paced innovation. Still, you tend to be more methodical than they are, and they may push for bold ideas when you think more facts are needed. Join them in brainstorming big ideas, but help them see the value in creating a careful development plan.

- Help them address the facts and look at the details.
- Give them projects that require quick decisions and immediate action.
- Encourage their spontaneity when appropriate.

Collaboration

People with the i style seek development opportunities that allow them to team up with others whereas you focus on tasks and individual projects. Your approach may not meet the developmental needs of these individuals, who probably don't crave as much autonomy as you do.

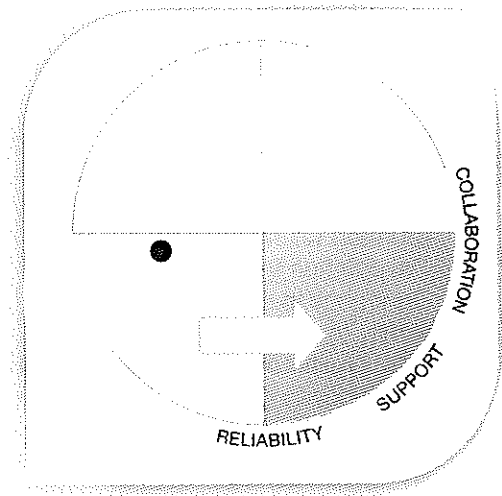
- Encourage them to pursue opportunities that involve working with others.
- Remind them that their growth will also depend on independent work.
- Allow them to lead small groups.

DEVELOPING YOUR "S" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Support

People with the S style want reassuring feedback that lets them know they are on the right track. However, you may be uncomfortable with providing emotional support, which may seem unprofessional or weak to you. Because you are driven and may seem to lack emotion, they may worry that you're unhappy with their progress.

- Avoid equating the developmental process to only results, productivity, or success.
- Ask directly but gently for their thoughts about their interests and skills.
- Show patience and understanding for their fears and concerns.

Reliability

These individuals are stable and reliable, and they may be leery of bold ideas or change. They will do their best to meet your high expectations as long as you make them clear. You may need to challenge them to step out of their comfort zone occasionally to tackle new responsibilities that could advance their careers.

- Help them look beyond the risk in a bold development plans to see the opportunities.
- Give them time to warm up to ideas that involve a lot of change.
- Provide them with plenty of information and clear expectations about their development.

Collaboration

People with the S style love to work with others, whereas you tend to focus more on individual achievement and competition. You may come across as more concerned with their work than with them as a person. With your different priorities, the two of you may struggle to see eye-to-eye on their professional development.

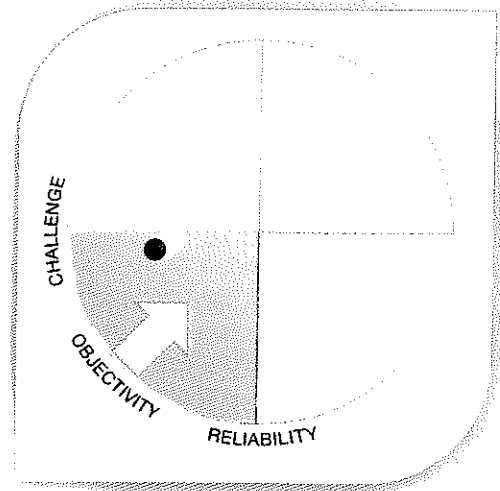
- Remember that they don't value individual accomplishment as much as you do.
- Encourage them to pursue collaborative opportunities while furthering their own development.
- Build on their ability to get along with diverse groups of people.

DEVELOPING YOUR “C” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Objectivity

Like you, people with the C style find facts and figures compelling, and they may get so caught up in this objective way of thinking that they become inattentive to more social aspects of work. Furthermore, because they are so autonomous, you may not prioritize discussing their development, which could hurt them in the long run.

- Encourage them to continue looking at development ideas logically.
- Respect their independence, but remind them that you can be an advocate for their development.
- Touch base often enough to make sure that you are on the same page.

Reliability

These individuals may attempt to control the quality of their work by sticking with comfortable responsibilities that require attention to detail. They may be inflexible about taking on potentially risky opportunities, and this may conflict with your more goal-oriented approach to their development.

- Avoid getting stuck in a rut of safe or traditional development plans.
- Be aware that they may have trouble admitting their limitations or acknowledging mistakes.
- Ensure they see the drawbacks of being overly cautious.

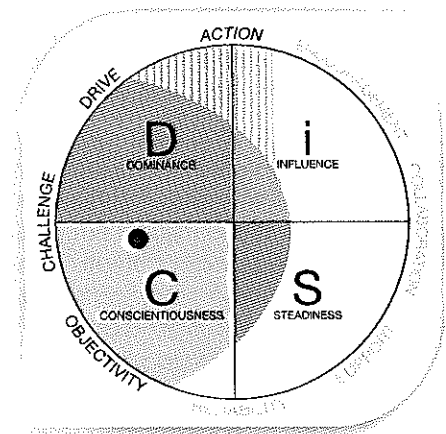
Challenge

People with the C style share your skepticism, and this may cause them to overanalyze ideas that you propose for their development. They may ask a lot of questions, or even meet your suggestions with passive-aggressive behavior, but don't let this prevent you from pushing them to set development goals.

- Demonstrate the rationale behind your suggestions for their development.
- Field their questions, but hold them accountable if they become unreasonable.
- Help them move beyond resistance toward constructive development plans.

HOW YOUR MANAGER SEES YOU

One of the most important but often overlooked aspects of management is sometimes called “managing up.” This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. This page provides insight into how your manager might see you.



► Challenging

Beau, since you have a CD style, you probably come across as systematic and determined. Because you're unlikely to accept ideas without asking a lot of questions, your manager probably feels confident that you'll uncover any problems that could compromise the end result. However, some managers may think you come across as stubborn or argumentative, while others may believe that you're too questioning.

- Your manager may see you as overly critical.
- Some managers are more likely to trust people who are more accepting of new ideas.

► Objective

Many managers may appreciate that you tend to think logically and avoid letting your emotions get in the way of rational conclusions. They may also like that you're willing to analyze all the options and calculate risks to get the highest quality outcome. On the other hand, some managers may see your consistent focus on the facts as short-sighted.

- Your manager may think that you rely too heavily on data.
- Because of your focus on facts, some managers may think you don't have the social presence that leaders need.

► Driven

Because you're so determined, your manager probably appreciates that you can be counted on to deliver quality results that affect the bottom line. In addition, you're usually willing to take charge when needed, and your manager may see you as someone who will keep things on track. On the other hand, you may come across as impatient or inflexible if you insist on your approach at the expense of others' ideas.

- Your manager may see you as overly insistent or demanding when you're pushing toward your goals.
- Some managers may believe that you're too focused on your own agenda.

► Active

Unlike others with the CD style, you tend to be active, and many managers may appreciate that you take the initiative to make things happen quickly. However, some managers may worry that your rapid pace could lead to unstable outcomes.

- Your manager may think your propensity for action could cause you to skip over important steps.
- Some managers may have trouble keeping up with your quick pace.

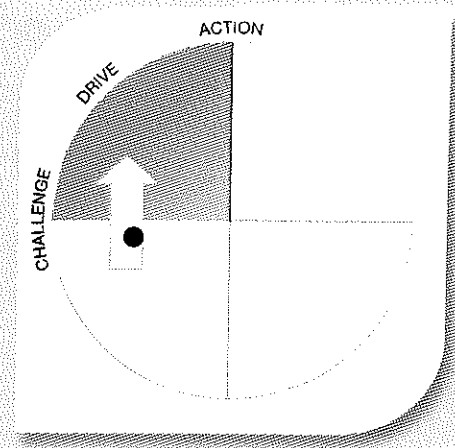
WORKING WITH "D" MANAGERS

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

Their Priorities & Preferences

Managers with the D style put a strong emphasis on drive and are active in pursuing bottom-line results. They can be demanding and blunt and won't hesitate to voice their skepticism. Overall, they respond best to people who can quickly help them achieve success.

- Like you, their driven nature means that they will do whatever it takes to reach their goals.
- Like you, they prioritize action and want to keep progressing at a rapid pace.
- Like you, they probably challenge themselves and aren't afraid to challenge others.



Advocating & Getting Buy-In

Managers with the D style want to know how your ideas can bring about concrete results. By emphasizing the big picture and showing how your proposals will have a direct impact, you may be able to gain their buy-in. And because they respect confidence, your tendency to be straightforward and back up your opinions with facts may increase the odds that they will support you. Furthermore, while it may come more naturally to you than to others with the CD style, you share the D manager's emphasis on forward progress at a rapid pace. Therefore, show them how your ideas can help them reach their goals quickly and avoid excessive analysis. In addition, keep in mind that they're likely to dismiss an idea if you've ignored their advice. They want to feel in control, so show respect for their leadership and offer them an ownership stake in the solution.

- Avoid getting bogged down in analysis.
- Project confidence in the concrete results they can expect from your plan.
- Ask for their advice and make them part of the solution.

Dealing with Conflict

Managers with the D style can become competitive in conflict, creating win-lose scenarios without room for compromise. Like you, they may be very direct and occasionally headstrong. As a result, you may view one another as stubborn, and you both may argue to defend your position. For this reason, when disagreements arise, each of you may think that the other is looking for a fight. Therefore, resist the urge to escalate the conflict, and avoid trying to overwhelm them with logic. Make your points in an objective, matter-of-fact way, and focus on resolving arguments rather than on winning.

- Communicate your points objectively but not stubbornly.
- Make your primary goal to resolve the conflict.
- Stick to the facts and avoid hot buttons.

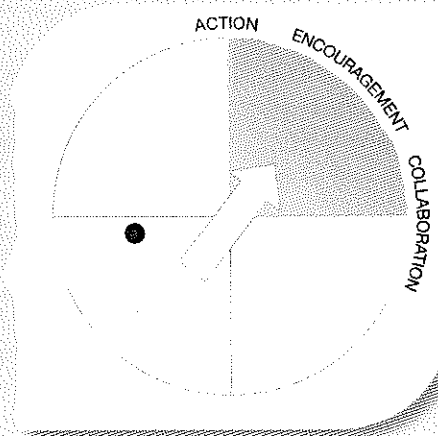
WORKING WITH “I” MANAGERS

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

Their Priorities & Preferences

Managers with the i style tend to be energetic and encourage others to do their best. Overall, they want to lead a fast-paced but friendly team, and they will likely respond best to people who like to create an optimistic team spirit.

- Unlike you, they focus on encouragement and celebrating group victories.
- Unlike you, they prefer to work with others and prioritize teamwork.
- Like you, they focus on action and move quickly while striving for forward progress.



Advocating & Getting Buy-In

Managers with the i style look for cooperation and want to know how your plans will affect other people. As a result, they may not find your more challenging, skeptical nature conducive to the collaboration they seek. If you want their buy-in, show them that your solution has the power to invigorate people, and explain how team members can work together to reach your goals. Furthermore, while it may come more naturally to you than to others with the CD style, you share the i manager's interest in fast movement, so communicate your desire for things to happen quickly. However, be aware that your focus on logic and the bottom line may fail to capture their attention. Focus on the positive aspects of your plan, and try to sell your idea rather than rationalize it based on the facts.

- Focus on your idea's potential for excitement and energy.
- Show them how your plans will have a positive impact on people.
- Be flexible when presenting your ideas.

Dealing with Conflict

Managers with the i style want to maintain friendly relationships. However, self-expression is very important to them, so may insist on making their feelings clear in a confrontation. This may be difficult for you since you tend to withdraw from emotional displays. In addition, you may become defensive if pushed, causing them to view you as unyielding or stubborn. Be careful that your directness doesn't come across as a personal attack, and be aware that they may have trouble letting go of issues. Express concern for their feelings, and let them know that you want to maintain a good relationship.

- Show that you understand their feelings.
- Don't rely solely on logic to resolve the situation.
- Make it clear that your relationship is still strong even after disagreements.

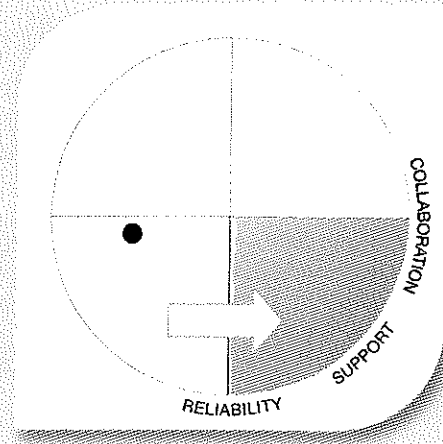
WORKING WITH "S" MANAGERS

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

Their Priorities & Preferences

Managers with the S style tend to be accommodating and dependable. Overall, they want to lead a team in a calm setting where tension is rare, and they will likely respond best to people who are friendly team players.

- Unlike you, they emphasize people's feelings and are more concerned with maintaining relationships than you tend to be.
- Unlike you, they would rather work collaboratively than independently.
- Unlike you, they often dodge change in order to maintain a dependable setting.



Advocating & Getting Buy-In

Managers with the S style want to see how your ideas can contribute to steady progress and reliable results. Keep in mind that they value security and stability, so they need to feel positive about an idea before taking risks. Therefore, present your ideas clearly and methodically to demonstrate the dependability of your solution. Furthermore, they're interested in collaboration and team unity, and they probably don't share your focus on the bottom line. Rather, they look for cooperation and harmony. To gain their buy-in, avoid dwelling on facts and data, and refrain from emphasizing results at the expense of people. Instead, point out how aspects of your solution can bring the group together.

- Walk them through your plan step-by-step.
- Give them time to consider the implications of any changes you are proposing.
- Make sure to emphasize reliability.

Dealing with Conflict

Managers with the S style dislike confrontations, and they may tiptoe around conflict to maintain harmony. If you come across as blunt or defensive, they may withdraw from the argument. However, don't assume their silence means the matter is resolved. If you allow them to bury their feelings, resentment may build and they may not view you as a trustworthy ally in the future. Address issues directly, but remember that feedback delivered in an objective, detached way can seem hurtful to them. Because a logical, analytical approach may be ineffective, show empathy and acknowledge their feelings.

- Address the situation directly but diplomatically.
- Avoid dismissing the conflict unless you're sure it's resolved.
- Don't try to overpower them with logical arguments.

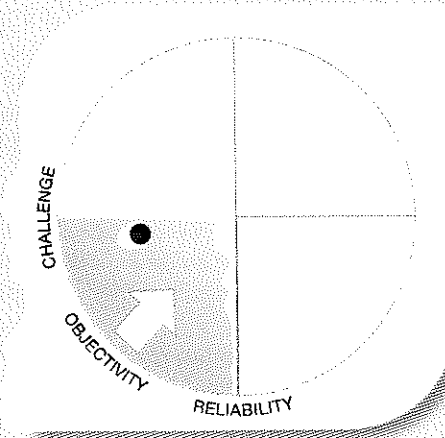
WORKING WITH "C" MANAGERS

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

Their Priorities & Preferences

Managers with the C style put a strong emphasis on logic and maintaining a stable environment. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

- Like you, they spend a lot of time on objective analysis to ensure accuracy.
- Unlike you, they tend to move cautiously in order to deliver a reliable outcome.
- Like you, they tend to show skepticism for ideas that aren't backed up by facts.



Advocating & Getting Buy-In

Managers with the C style want to see how your ideas can lead to high-quality solutions. Like you, they want to catch flaws before complications can arise, so they're likely to be somewhat skeptical. Be prepared to defend your plan, but avoid insisting that your idea is the only correct answer. Instead, ask them to help formulate your solution, and acknowledge their expertise and competence. Also, be willing to adapt your plan if their questions reveal problems. Furthermore, they're more interested in reliability than speed, so you may need to show them that you've thought through all of the consequences of your plan. By giving them the information they want and the time to process it, you will be much more likely to get them on your side.

- Be ready to provide all the information they need to reach a decision.
- Show them that you respect their expertise by seeking their advice.
- Rely on facts and data for support.

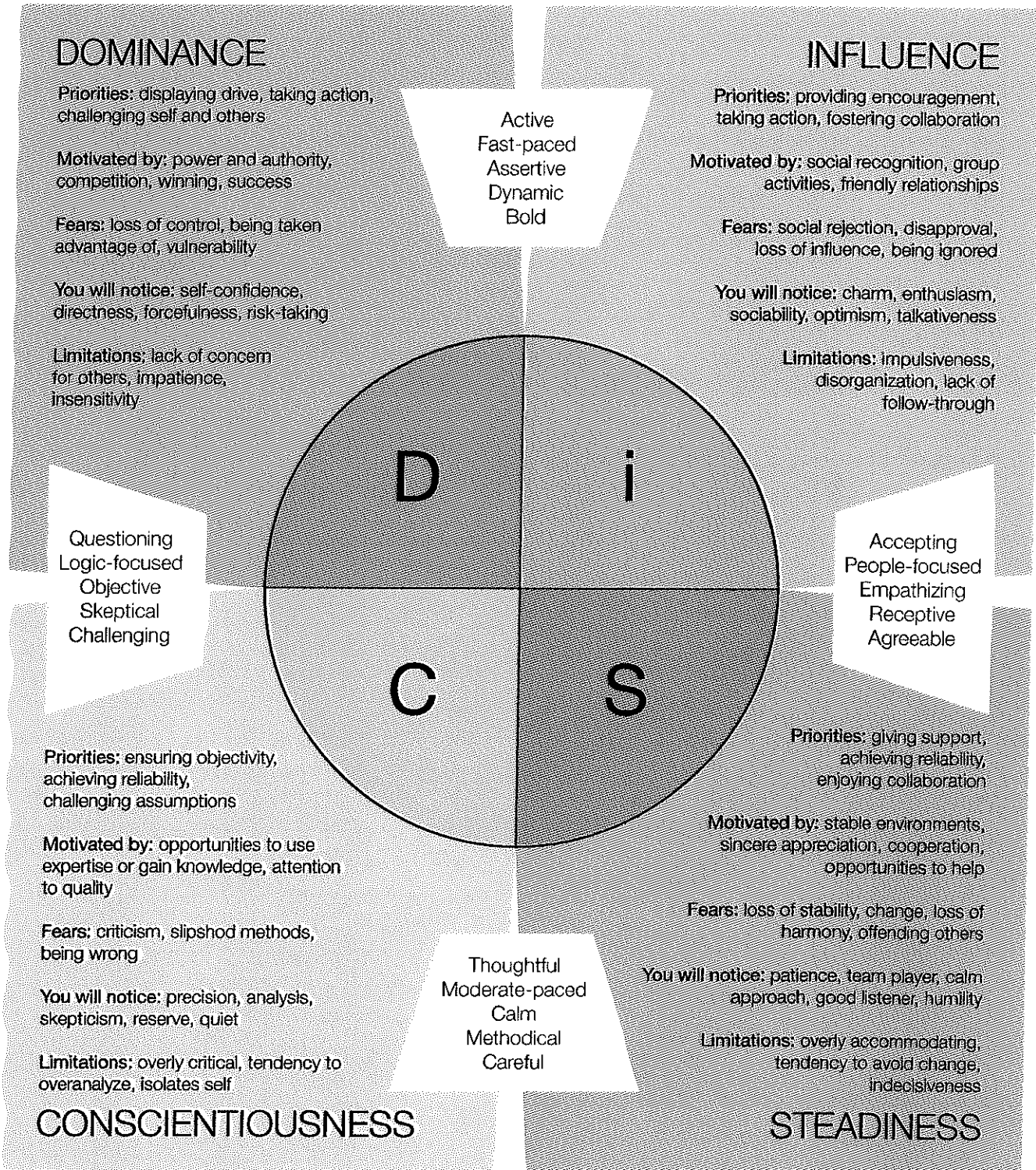
Dealing with Conflict

Managers with the C style often try to overpower opposing viewpoints with logic. If emotions begin to run high, however, they may withdraw or become passive-aggressive. You also tend to avoid emotional confrontations, but you're more likely to be blunt or straightforward. As a result, you may engage in power struggles over who has the most rational argument. Keep in mind that they dislike being proven wrong, so poking holes in their reasoning can make them defensive or angry. State your position objectively and give them time to present their side.

- Stay away from forceful tactics that are likely to antagonize them.
- Support your position with logic and facts.
- Focus on resolving the conflict rather than winning the argument.

APPENDIX: OVERVIEW OF THE DiSC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



Donald G. Kewlev

dkewleysr@gmail.com

<https://www.linkedin.com/in/donald-kewlev-0a321714>

December 30, 2018

Dear Hiring Director:

I am interested in the Palm Coast City Manager position because I believe my education and past work history has prepared me to meet all of the responsibilities this position carries.

While serving for thirteen years in the California and Oregon Army National Guard I learned about the effectiveness and importance of working as a team. In addition, I learned how to make important logistical and strategic decisions while leading my team through challenging and stressful situations. My work as a project manager in construction and program manager in the utility industry enhanced my management skills by teaching me to effectively develop business to business and customer relationships, manage stakeholder expectations, manage time, manage money, and direct resources towards the accomplishment of an organizations operational objectives.

The combination of the MBA I earned from Pepperdine University in Leadership and Bachelors of Science in Business Administration Chico State University was geared towards building my leadership & managerial skill sets and taught me to facilitate change and growth in a volatile global economy. My education, military service and past work history demonstrates my commitment to be an excellent leader and manager of people and resources. I am confident that I will be a significant asset to any organization's management team if given the opportunity to prove myself.

Although my resume provides a summary of my background and experiences, I would very much like the opportunity to discuss, in person, how I can meet the demands of this role in order to advance the overall mission of your organization.

Sincerely,

Donald G Kewley

dkewleysr@gmail.com

DONALD G. KEWLEY

<https://www.linkedin.com/in/donald-kewley-0a321714> | dkewleysr@gmail.com

OPERATIONS MANAGER

Program Oversight | Operations Stewardship | Strategy Conception

Executive manager with expertise in all facets of operations, project and program management; financial analysis, and controllership within high-profile corporations. Skilled in collaborating with all members of the organization to achieve business and financial objectives. Integral in streamlining and refining processes, boosting productivity, and implementing learning solutions.

- Experienced Senior Manager
- Strategic Planning & Analysis
- Industry Networking
- Marketing & Outreach
- Logistics Management
- New Business Development
- Project Lifecycle Compression
- Contract Negotiations
- Business Consultation

PROFESSIONAL EXPERIENCE

City of Ashland (COA), Ashland, OR

Jan 2017 to Present

AFN Operations Manager

- Plan, direct, and supervise the development, implementation, and maintenance of the Ashland Fiber Network (AFN)
- Development of divisional strategic plans, budgets, goals, programs, policies, and procedures in order to provide appropriate and effective Internet and technology services to the City and community.
- Manage AFN telecommunications and technology projects, coordinate cross functional teams, vendors, and subcontractors, prepare requests for proposal (RFP) and administer consultant selection processes; develop work plans, timelines, and budgets; monitor, review, and approve work products; maintain project documentation and prepare reports.
- Create work plans, budgets, project timelines, monitor work flow, and evaluate completed projects.
- Supervise and evaluate the work of subordinates; interview, select, assign, direct, and evaluate employees.

Pacific Gas & Electric Company (PG&E), San Francisco, CA

Oct 2015 – Jun 2016

Senior Project Manager

- Led projects for Energy Savings Assistance (ESA) multimillion dollar materials contract, evolution bulk materials acquisitions and contract management with the California Public Utilities Commission (CPUC).
- Managed contract negotiations, Request for Proposal (RFP) analysis, Service Level Agreements (SLA), and Statements of Work (SOW).
- Developed Request for Proposal (RFP), contract negotiations, and project management plans.
- Partnered with IOU's researching industry trends and benchmarks associated with energy contracts.

MJM Management Group, San Francisco, CA

Feb 2015 – Oct 2015

Project Manager- Capital Projects

- Prepare requests for proposal (RFP), strategic planning, develop work plans, timelines, software development, budgets; monitor, review, and approve work products; maintain project documentation and prepare reports.
- Spearheaded public domain and real estate capital construction projects and facilitated bidder conferences thru initial contract negotiation qualification bid proposals and vendor selections.
- Orchestrated project lifecycles via MS Project and provided technical compliance vectors with California Energy Efficiency Standards, Title 24, and health and building codes.

The Mosaic Company, San Ramon, CA

Sep 2014 – Jan 2015

Senior Learning Strategist

- Strategic planning, forecasting, budgeting
- Bolstered PG&E training academy by invigorating organizational communication relationships across lines of business.
- Facilitated Subject Matter Experts (SME)/Lines of Business (LOB) conferences including Kickoff, Alpha review, Beta review, and Project Closeout (Key Learning).

...continued...

DONALD G. KEWLEY

Page Two of Two

- Directed learning solution effectiveness with stakeholder risk assessments and recommendations to business teams.

Bay Area Systems and Solutions, Inc. (BASS Electric), South San Francisco, CA

Feb 2014 – Aug 2015

Project Manager

- Managed city and county public works and commercial construction projects.
- Managed design-build and LEED projects.
- Facilitated the implementation of new construction management software applications.
- Prepared budgets, Request(s) for Information (RFI), change orders and monitored timelines via MS Project.
- Cemented partnerships with cross-functional teams consisting of stakeholders, vendors, and subcontractors.

Rodan Builders, Burlingame, CA

Oct 2013 – Feb 2014

Government, Commercial, Industrial and Institutional Tenant Improvements

Project Manager

- Contract negotiation, strategic planning, forecasting, budgeting and resource allocation.
- Managed cross functional teams, vendors, and subcontractors for city and county public works construction projects
- Collaborated Job Order Contracts (JOC - joint construction delivery via eGordian (construction task order catalog).

Richard Heath and Associates Inc., Chico, CA

Jul 2011 – Oct 2013

Program Manager II

- Managed \$14M portfolio of Small and Medium Businesses (SMB) energy efficiency programs for investor-owned and municipal utilities and local government partnerships in Northern and Central California
- Contract negotiation, strategic planning, forecasting, budgeting, marketing and customer education
- Increased divisional revenue by \$2.6 million in 2 years
- Developed and managed community outreach programs with business leaders, government and industry professionals.
- Targeted SMBs with emerging technologies aimed at improved energy expenditure and operating expenses

Cleanrite-Buildrite, Chico, CA

Sep 2009 – Jul 2011

Project Manager/Estimator

- Managed up to 25 small to medium restoration and new construction projects simultaneously.
- Liaised construction negotiations between stakeholders, insurance companies and customers.
- Estimating, budgeting, forecasting, billing, procurements, monitored projects via MS Project.
- Managed cross functional teams, vendors, and subcontractors.

ADDITIONAL EXPERIENCE & SKILLS

- Outlook, MS Office Suite, MS Project, MS Visio, Xactimate, eGordian, Accubid Pro, Procore, OSX, iMovie, iPhoto, VM Ware, SAP R3, Vensim PLE, Adobe Professional, Adobe Illustrator, Adobe Light Room, Munis, etc.

EDUCATION & CREDENTIALS

M.B.A., Pepperdine University Graziadio School of Business and Management, Malibu, CA. 2018

B.S., Business Administration, California State University, Chico, CA. 2009

Certified Sustainability Manager (CSM), Everblue, Huntersville, NC. May 2013

PROFESSIONAL DISTINCTIONS & MEMBERSHIPS

- Project Management Institute (PMI) ▪ Association for Operations Management (APICS) ▪
- Green Project Manager (GPM) ▪ U.S. Green Building Council-Northern California Chapter (USGBC-NCC) ▪
- United States Army National Guard, CA 1982-1995 ▪

City Manager Pre-Interview Questionnaire
City of Palm Coast, Florida
Due NLT Monday, February 4th at 11:00 PM CST

Full Name (first, middle, last): Donald Glenn Kewley
Nicknames (if any): None

Please provide your cell, home, and office numbers to facilitate contacting you if needed.

Cell: _____
Home: Same as above

Please answer each of the following questions completely and thoroughly.

1. How many employees, and what size budgets did you oversee in your last three positions?
 - City of Ashland Fiber Network Operations Manager (6) direct reports, 4 Internet Service Providers/Resellers and manage subcontractors; \$4.3 million budget.
 - KellyMitchell (PG&E 3rd Party Contractor) Senior Program Manager; (0) direct reports; managed procurement & direct-install subcontractors; \$50 million budget.
 - MJM Management Group (City of San Francisco 3rd Party Contractor) Capital Project Manager; (0) direct reports; Supervised projects and managed Subcontractors; \$25 million budget.
 - In my Program Manager II position with Richard Heath and Associates I managed a team of 44 people across 23 counties in Northern and Central California. My working budget at the time was \$14.6 million.

2. Please detail the specific departments you have supervised in your last three positions.
 - City of Ashland Fiber Network – I manage all operational aspects of the city-owned telecommunications infrastructure. This includes but is not limited to: strategic planning, forecasting, budgeting, marketing, personnel, training, project management, contracts and administration, billing, customer service & outreach, and managing the public-private Internet Service Provider (ISP) partnerships.
 - KellyMitchell (PG&E 3rd Party Contractor) Senior Program Manager – I worked with consultants from Price Waterhouse Cooper (PwC) to design a bulk purchasing/procurement process and administered the RFP for Pacific Gas and Electric Companies \$500 million Energy Savings Assistance Program (ESA).
 - MJM Management Group (City of San Francisco 3rd Party Contractor) Capital Project Manager – I worked with the City of San Francisco Office of Community Investment and Infrastructure (OCII) To prioritize capital infrastructure projects, develop project scopes & specifications, manage the RFP process from beginning

to end, prepared and managed capital construction project contracts on behalf of the City of San Francisco, served as the project manager for construction projects, managed vendors and key stakeholders and worked as a contributor on MJM Management Groups Urban Development Project Design Team on several public space projects across the United States.

3. Please explain why you left your last three positions.

- City of Ashland Fiber Network – Currently employed with the City of Ashland but I feel undervalued in my current role and I am seeking professional growth opportunities.
- KellyMitchell (PG&E 3rd Party Contractor) Senior Program Manager – This was a contract position that ended due to lack of funding.
- MJM Management Group (City of San Francisco 3rd Party Contractor) Capital Project Manager – My personality didn't align with the company culture.

4. Are there any gaps in excess of two weeks in your employment history? If so, please explain in detail.

- The gap between my employment with KellyMitchell (PG&E 3rd Party Contractor) and the City of Ashland Fiber Network was because my family and I relocated to Southern Oregon for my spouse's employment. (June 30, 2016 -Jan 11, 2017)
- August to September 2014 – 5-week gap between my employment with Bass Electric and my contract position with the Mosaic Company. (August 18, 2014 – September 20, 2018)

5. Please describe your experience and skills in strategic planning and visioning? How do you facilitate development of a clear vision for the organization and communicate that vision to all stakeholders?

- I usually begin by working with my team to collect relevant data and holding brainstorming sessions with key stakeholders and internal staff. Stakeholder meetings should result in developing a unified vision and preparing the appropriate communication for each target audience (executive council sessions, press releases, town hall meetings, etc.). I would then work with my team to review the budget and begin developing strategies, goals and work plans that are geared towards accomplishing organizational objectives.

6. What do you feel are your greatest strengths as a leader and manager?

- To answer this question, I will share information obtained from a 360 Leadership Assessment that I participated in during the capstone course for my MBA program at Pepperdine University. I asked my current staff, peers, and two directors from the City of Ashland to evaluate me using a survey that administered by an independent consulting company. The results indicated my top three leadership competencies were as follows: integrity, inspires others and performance feedback and coaching/mentoring. I have listed a few of their comments and

provided a brief statement as to circumstances that may have prompted their responses.

- **Integrity:** Does the right thing even when negative consequence may result. Maintains a high standard of excellence when dealing with ethical, legal or regulatory issues. Conducts all dealings in an honest and upfront manner. When I accepted the Operations Manager role with the City I inherited several Public Utility Commission violations that had not been addressed for several years. Instead of placing the blame on my predecessor I immediately took ownership of the issues and worked with my staff to develop a plan for achieving compliance. Even though it would cast a negative shadow over my organization, I informed the City Council and Executive Leadership team about the issues and communicated the plan for resolving them.
- **Inspires Others:** Motivates and challenges his team to attain a shared vision. Clearly communicates project, customer, and/or organization objectives and inspires others to action. Articulates a compelling vision of the future. Within a few weeks of starting my position with the City I realized the team was suffering from lack of vision, communication and leadership. I began to host and facilitate structured team meetings on a bi-weekly basis. During these meetings, we discussed the organizations mission, safety concerns, customer issues, training needs, scheduling and I provided each member of the team with an opportunity to ask questions and discuss any barriers that may prevent them from performing their job.
- **Performance Feedback and Coaching:** Sets high performance standards and challenges others to excel. Consistently conducts performance reviews and provides constructive feedback to his team. Recognizes and celebrates the accomplishments of his team members and colleagues. Coaches employees in how to leverage individual strengths and develop skills to improve work performance. I have bi-weekly one-to-one sessions with every member of my team. During the one-to-one session's, we discuss their personal and professional aspirations and I provide them with mentoring and coaching. In January 2018, I had worked with my current staff for one year and I thought it would be a good time to conduct performance evaluations. Majority of the team had never been evaluated by their supervisor. The team was pleased that someone from the management realm cared about them enough to look at their performance and provide feedback.

7. What is the most complex project you have coordinated? Describe the steps you took to ensure political, organizational, and community support for the initiative, highlighting specific challenges you faced, and how you overcame them to successfully implement the project.

- I have coordinated several complex projects during my career. One of the most challenging was the servicing of two critical electrical switch gears at Yerba Buena Gardens in downtown San Francisco California These switch gears provide electricity for several large-scale operations for two city blocks. Affected facilities

included the Mascone and Marriott Convention Centers, Metreon shopping center and theatre, all the Yerba Buena Gardens facilities and City of San Francisco owned retail properties in the area.

- This was a mission critical project that required effective communication and the cooperation and coordination of several agencies and stakeholders. I facilitated planning and key stakeholder meetings for several weeks and worked with my contractors to put the whole thing together. They work would take approximately 8 hours to complete and both switch gears need to be serviced at the same time. One was fed by the Hetch Hetchy Hydroelectric Plant and the other by Pacific Gas and Electric Company. To further complicate the project some of the buildings couldn't be without power for an extended period so we had to procure several generators that were large enough to support the operation. In addition, the security systems for the entire area would be inoperable during the shutdown so we received assistance from the San Francisco Police Department.
8. Please describe your experience in overseeing the following operations: Water Treatment & Distribution, Wastewater Collection & Treatment, Municipal Stormwater, Street & Traffic Control, and Public Safety (Police & Fire).
- I have no direct experience overseeing these operations from a municipality perspective however, I have managed numerous public works, traffic control, storm water and water treatment construction projects throughout my career.
9. Please describe your experience and skills in municipal financial management, budget development, and capital infrastructure planning, maintenance, and financing. In your response, please highlight any related creative financing strategies you have used to address CIP infrastructure shortfalls.
- While working for the City of Ashland I have prepared and defended budgets for the City of Ashland Fiber Network. The Ashland Fiber Network is an enterprise fund, so the budget process includes forecasting revenues (Fiber, Cable TV, Miscellaneous Services, etc.), expenses (personnel, materials & maintenance and capital outlay) and debt service (paying off municipal bonds). During my time with the City of Ashland I have not experienced any CIP infrastructure shortfalls.
 - Prior to working in the government sector, I managed all operational aspects (profit/loss, forecasting, budgeting, billing, capital improvements, human resources, etc.) of several multimillion dollar 3rd party energy efficiency programs and government partnerships.
10. Please describe any experience you may have in assisting your community/organization in advancing voter-referendums to consider financing of proposed municipal capital projects and/or community initiatives? In your response, also indicate the results of any such referendums, including any lessons learned that you would apply in future referendums.
- During my career I have not had any experience with advancing voter referendums. The funding had already been secured for the municipal projects I

have been involved with. While working as a Program Manager II for Richard Heath and Associates I was involved in securing funding from the California Public Utility Commission and Federally sanctioned lending institutions for Energy Efficiency projects in Northern and Central California.

11. Please describe your experience with collective bargaining and labor relations, highlighting the types of bargaining groups you have worked with and tell us about any particularly innovative provisions/programs you may have incorporated in previous collective bargaining agreements?

- I have worked with the following work represented work groups: IBEW (electrical & clerical), Laborer's, Cement Masons and Operating Engineers. The innovative provision that I have been part of is a letter of understanding clause which my counterpart and I had put in the last CBA which allows the bargaining agreement to be modified as necessary to best accommodate the city's needs. For example, modifying work assignments and reducing to staff to compensate for budget cuts.

12. Please describe your philosophy and approach to building a strong team environment and motivating your employees to perform at their highest levels.

- A transparent and accountable culture is characterized by a feeling of trust at all levels. Situations are equitably resolved, and work is completed by collaborating with all the parties involved. OpenGov is a software application that's available to help cities promote transparency, streamline their budgeting process and promote public engagement. I strive to provide leadership and vision, insist on transparency, create a trusting environment that's built upon respectful open and honest communication. I believe in empowering my teams and giving them autonomy to complete projects or assignments. In my experience, employees who are given ownership and responsibility through inclusion and involvement in business processes, tend to feel properly recognized and justly rewarded.

13. How do you facilitate open and transparent communication with the Mayor & City Council, staff, residents, and other stakeholders?

- For me it begins by having an open-door policy. I strive to approach each situation objectively and encourage all parties to engage in an open and honest dialog (check ego's and politics at the door). I always seek to understand what questions need to be answered and what information is needed. I then determine which type of communication works best for the given situation and I provide the requested information in a timely manner. I find value in using surveys and hosting listening sessions or community engagement events to seek public input and support on matters of significant importance.

14. Palm Coast desires to be recognized as a community that encourages development consistent with its evolving vision from a largely residential planned community to a more diverse, mixed-use, residential, commercial, high-tech, and high-skill business center to diversify the City's tax base. Please tell us about any innovative strategies that you have

used in your current or previous posts that successfully resulted in increased economic development, including providing some notable examples.

- In my experience Environmental (Green) Initiatives, Smart City strategies and the availability of affordable housing result in diverse communities and promote strong economic development. During my time with the City of Ashland, I have partnered with the local Chamber of Commerce, community-based organization's (CBO's), Next Century Cities and the National Association of Telecommunications Officers and Advisors (NATOA). Through my partnerships with these organizations I have been able to implement cost savings programs, update my organizations strategic plan and develop a marketing strategy/plan to promote the city and services it provides for the community.

15. Please tell us about any notable intergovernmental partnership(s) you have developed or played a significant part in their implementation. As part of your answer, highlight any significant challenges that you had to overcome to help make the partnership(s) successful.

- As the only municipally-owned telecommunications in Southern Oregon my organization has developed several inter-government service agreements in place. These agreements enable the Ashland Fiber network to provide high-quality and affordable Internet Bandwidth to neighboring communities to support mission critical services. The biggest challenge is getting community support as a small number of tax payers are concerned their money is being used to subsidize the effort. In addition, one of our city councilors is a director for a neighboring community for which my organization provides services which adds complexity to the situation. The councilor recuses himself from any decision making with respect to the partnership and the legal teams from each community carefully review all associated documentation and payments for services.
- While working as a 3rd Party Program Manager II for Richard Heath and Associates I managed several government partnerships. These groups had representatives form cities, counties, local housing authorities, economic development corporations, elected officials (congressmen, representatives, mayors, etc.). the goal of these organizations was to provide services for the underserved communities in Northern and Central California. While working in this capacity I helped develop several pilot programs that brought new energy efficiency programs to various communities throughout my territory.

16. What steps and/or processes have you used to track the performance of your organizations? Please include any specific examples involving performance metrics, and how you have communicated organizational efficiencies to the public and/or employees.

- I my current role with the City of Ashland my departments performance is measured by industry benchmarks in the following areas: Service interruptions caused by Node issue, customer outages corrected the same day, new customer

connects within 2 business days, network latency, network uptime, facilities inspected % plan completed, Facility Remediation and PUC violations corrected.

17. Palm Coast currently operates FiberNet, a municipal high-speed fiber-optic backbone that connects City sites and facilities. The City's economic development goals include the attraction of dynamic, high-paying technology jobs, bolstered by the enhancement of its fiber network, ideally with the assistance of a new public-private partnership (P3) to help leverage its assets. Please tell us about any municipal fiber experience you may have, as well as any P3 projects you or your organization(s) may have been involved with, highlighting your particular contributions to the development and/or maintenance of such partnerships.

- I have managed all aspects of Ashland's City-Owned Fiber Network for 2-years. During that time, I have worked with the City Council, City Leadership Team and the Citizenry to improve the organizations performance and public perception. The facilities I manage include a combination of 119 miles of coaxial network and 25 miles of fiber on 1,750 utility poles or buried in underground conduits. The outside plant includes 40 optical nodes and more than 1,000 amplifiers, power supplies and other active devices. The organizations Headend and Network Operations Center is configured with industry standard equipment. The current internet bandwidth capacity of the plant is 20 Gigabits of carrier and path diverse transit and 10 Gigabits of transport.

The organization is setup an open access model meaning the city owns, manages operations and maintains the telecommunications infrastructure, then leases it to preferred locally owned Internet Service Providers (ISP's) so customers can choose between going with AFN directly or the partner ISP that best fits their needs. Through the public-private partnership the City of Ashland provides high-speed, robust, broadband telecommunication services to approximately 4,200 residential, commercial, health care and educational customers in the Ashland area.

The infrastructure presently has nine cable modem service levels enabling customers to select the service level that best fits their needs. AFN's direct fiber service provides connections up to 1Gigabit per second, with 99.9% connection availability, and 24/7 local technical support. My organization also offers up to 24Mbps wireless service via a tower serving residential customers living outside the urban growth boundary.

Cable TV is provided to the community through a lease agreement between the City of Ashland Fiber Network and a local retail partner. The cable TV signals transit AFN's network. The Ashland Fiber Network is responsible for the maintenance and regulatory compliance of the network along with performing hot-connects and disconnects for TV installations and responding to majority of the cable TV service calls. The City data network transits through AFN connections

as the City government operation relies on the Telecommunications Division for mission critical connectivity.

18. When we conduct a comprehensive background investigation and reference checks, what will we find that may warrant explanation or that could be of concern to the City of Palm Coast?

- I have had several comprehensive background checks and am certain you won't find anything with my background or reference check that will require an explanation. I do have student loans, medical bills and tax payments all of which I am currently making payments.

19. What will we find in an internet search of press coverage that may be controversial or of concern to the City of Palm Coast? Please provide whatever explanation you think is appropriate to help us understand what we will find.

- I haven't been associated with any press coverage that will require an explanation.

20. Are you currently involved in any other searches and what is your status in those searches?

- I have applied to positions in the Pacific Northwest, but the postings have not closed.

21. Please provide a full description of your current compensation and benefits package and your desired compensation and benefits package if you were selected for this position.

- Step 5 of 5 Operations Manager salary
- PEERS, 401k, medical, dental, life, supplemental Insurance, VEBA contributions, Health Savings, Tuition reimbursement, mileage reimbursement
- 40 hours admin leave annually, 5 hours Vacation bi-weekly, 4 hours sick bi-weekly, paid holidays

22. If you were selected and offered an acceptable compensation package, what concerns or hesitations do you have that would have to be resolved before you would be ready to accept the position as the next Palm Coast City Manager?

- Out of courtesy, I would need to provide my current employer at least 30 days' notice prior to my departure. I would also be concerned about securing short-term and long-term housing and the costs associated with relocation.

23. What are the three most important questions you have for Palm Coast Mayor & City Council?

- What metrics would you utilize to determine whether your new city manager and their leadership team has been a success?
- What are the top three priority issues that you would like to see addressed by the incoming City Manager and what is the anticipated timeline for completion?
- What creative financing activities have found to be successful for your community and what hasn't worked?

Donald Kewley

Palm Coast City Manager Candidate

February 27, 2019

First Year Outline

First 30 Days

- Meet with the interim city manager and discuss the leadership transition plan.
- Setup one-on-one meetings with the mayor and city council.
 - Discuss goals and priority issues.
 - Discuss preferred methods of communication for:
 - Day to day operations and civic events.
 - Emergencies and disasters.
 - Discuss the city's mission statement and vision for moving forward.
- Tour the city with the mayor, city council and leadership team.
- One-on-one meetings with the city's Leadership Team.
 - Ask the city leadership team what their priorities would be in the first 90 days.
 - Discuss the city's mission statement and vision for moving forward, provide opportunities for questions and ensure that everyone is onboard.
- Develop a deep understanding of the budget and the city's current financial condition.
 - Meet with the city's finance director.
 - Conduct a thorough budget review
 - Discuss debt financing and bonds.
 - Review and develop an understanding of the city's financial policies.
 - Determine the city council's understanding of the city's financial condition.
- One-to-one meeting with the city attorney.
 - Get information and updates on any active litigation.
- Review the city's strategic plan and request progress updates from the leadership team.

- Workforce training and development (what programs have been implemented and what's the participation rate).
- Economic development and expansion (review the current branding strategy, what current programs are currently in place, what metrics are being utilized to measure success).
- Tourism (discuss current methods and sources being utilized to promote tourism and how much revenue is the city currently generating from tourism).
- Technology expansion.
- Environmental sustainability (energy efficiency and water conservation).
- Meet with Parks & Recreation team to discuss the following:
 - Maintenance.
 - Life cycle assessments.
 - Expansion plans.
 - Public space activation plans and revenue generation opportunities.
 - Potential grants and additional funding sources.
- Meet with the local Law Enforcement leadership team.
 - Discuss current safety measures have implemented for emergency/disaster preparedness and public safety.
 - Find out if a community emergency response team been created.
- Meet with the Fire Department leadership team
 - Discuss the existing emergency/disaster preparedness plan, policies and procedures.
- Meet with the Information Technology team and learn more about the following items:
 - Fiber Network Infrastructure.
 - Review ISP Partnership Agreements.
 - Vendor performance metrics and/or score cards.
 - Wireless Infrastructure.
 - Help Desk Services.
 - City of Palm Coast FiberNet marketing plan (if one has been created).

- One-to-one meetings with partner ISP's.
 - Review contracts and service level agreements (SLA's).
 - Review business and marketing plans.
 - Discuss growth strategies.
- One-on-one meetings with community leaders.
 - Chamber of commerce president.
 - Communicate the city's mission and vision for moving forward.
- Meet with Flagler County leadership team.
 - Look for ways to partner on key initiatives.
 - Communicate the city's mission and vision for moving forward.
- Begin the process for conducting a high-level organizational analysis.
 - Seek to understand and analyze existing departments, processes and existing systems.
 - Assess the city's readiness/fitness for change.
 - Determine training needs and requirements.
 - Look for process optimization and value engineering opportunities.
- Create a list of priorities issues that require immediate attention.
- Review the city's general plan
 - Discuss the general plan with the planning director.
 - Review real property and city owned asset documentation.
 - Review building condition ratings and lifecycle assessments.
- Review collective bargaining agreements (CBA's) for unionized staff.
- Visit local businesses and meet the owners and/or managers.
- Meet with the local media and get to know the editors and reporters.

60 to 90 Days

- Work with the city's leadership team and staff and perform a SWOT analysis
- Conduct one-on-one meetings with city staff
 - Ask employees what they would change

- Communicate the city's mission and vision for moving forward, provide opportunities for questions and ensure complete understanding.
- Review the city's safety program
 - Review findings from past safety audits and discuss actionable items
- Schedule monthly progress check-ins with the mayor and city council
- Continue visiting local businesses and meeting with owners and/or managers
- Conduct ride-a-longs with the fire department and local law enforcement
- Initiate a citizen engagement night with the city council and staff – visit residents in under-represented neighborhoods to solicit their ideas/input about the needed infrastructure improvements, housing needs and feedback on the city's performance
- Work with the city's marketing staff to develop and post a citizen engagement survey on the city's website and social media sites.
- Work with the leadership team, union business representatives and local colleges or training organizations to develop a comprehensive training and performance evaluation program for city staff.
- Meet with local workforce development organizations.

120 to 180 Days

- Introduce a city sponsored community engagement and training program (Team Palm Coast). This is a structured training program geared towards providing selected citizens with an opportunity to get an insider perspective and better understanding of the city's operations (streets, waste water, administration, community development, parks & recreation, etc.).
- Continue monthly progress check-ins with the mayor and city council.
 - Reaffirm the city's mission and vision for moving forward.
- Continue visiting local businesses and meeting with owners and/or managers.
- Share findings of the organizational analysis, SWOT analysis and citizen engagement night with the mayor, city council and leadership team.
- Present training and performance evaluation to the mayor and city council.

- Work with staff to prioritize key issues and develop plans for actionable items.
- Work with staff to address identified gaps in existing city administrative policies and procedures.
- Work with leadership team and staff to prepare and present the next year's budget.
- Partner with local colleges and universities and develop an internship program and workforce development opportunities.

Remainder of the year

- Continue monthly progress check-ins with the mayor and city council.
- Prepare a six-month observation report and work plan for addressing actionable items.
- Evaluate and pursue grant or funding opportunities for technology projects, infrastructure upgrades, parks and recreation expansion projects and economic development.
- Work with the city council, leadership team and staff to finalize the next year's budget and capital improvement plan.
 - Evaluate potential funding and grant opportunities.
- Monitor progress on change initiatives and seek feedback from the city's leadership team regarding any implemented policy or program changes.
- Ensure the leadership team is consistently communicating the city's mission and vision for moving forward.
- Continue visiting local businesses and meeting with owners and/or managers.
- Prepare and end of year evaluation, lessons learned report for the mayor and city council.

February 21, 2019

To whom it may concern:

I am writing this letter to offer my recommendation for, and professional experience with, Mr. Donald Kewley.

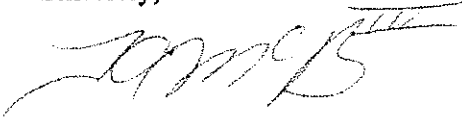
Mr. Kewley and I have worked closely on many things since he came to the City. At that time, I was the electric operations superintendent, since then I have been promoted to electric director. The departmental overlap has allowed me the opportunity to have an up-front view as Mr. Kewley quickly took the reigns and set a new direction for the Ashland Fiber Network.

Mr. Kewley has continually shown the depth of his skillset in his work to transform AFN. What was once viewed as a "black eye" on the City and a sore subject amongst many citizens has become a source of pride and a model for other cities.

The challenges that Mr. Kewley faced when he began with the AFN were multi-dimensional. He has been able to reshape the focus of his team and increase efficiency dramatically. He has worked tirelessly to modernize systems improving product offerings. He has also reviewed and renegotiated contracts with partners and vendors to ensure that AFN is competitive in a very competitive industry.

I have no doubt that the leadership and vision that Mr. Kewley has brought to AFN and Ashland would be sorely missed, should he choose to leave. I also have no doubt that his leadership would be a great addition to any organization. Not that he needs it, I wish him the best of luck and good fortune in all his future endeavors. I also congratulate any organization that welcomes him, they have made a great choice.

Sincerely,



Thomas A. McBartlett III
Electric Director
City of Ashland, Electric Utility

February 20, 2019

To Whom This May Concern:

I was on the hiring committee when the City of Ashland hired Donald Kewley on January 11, 2017 for the position of Ashland Fiber Network's (AFN) Operation's Manager. Usually when interviewing for positions it is difficult to determine if a candidate would be able to perform up to the standard they portray. I can testify not only has Mr. Kewley performed in every area he proposed but exceeded in all areas and beyond the scope.

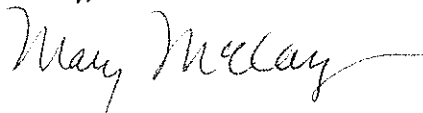
In addition, he was tasked with creating a positive perception regarding AFN within the city council, city administration, city staff and the citizens of Ashland. AFN's internet service providers (ISP) had poor working relations with AFN due to lack of communication, reliability and accountability. He has facilitated and turned around a broken, ill-reported, negatively perceived city division, and turned it into a profitable enterprise. Leading an ununited team when he began, he has managed to create a team that is united and works toward obtaining goals that were unattainable prior to his arrival in just two years.

Mr. Kewley has implemented many new programs that benefit the city and other small businesses, for example: creating a new scheduling program that other ISPs are able to utilize and facilitate thereby cutting back everyone's costs and frustration. He implemented a senior and low-income program to provide opportunities for all citizens to utilize the benefits of AFN. He steadily has increased revenue since he began his employment and added 3 new positions to his team to keep up with the demand of growing a telecommunications operation. His community outreach has changed the perception and even given AFN a national presence. He has been asked to speak at several conferences due to his experiences and knowledge.

I have personally witnessed results from his determination and tenacity to win in every endeavor especially when the impossible was presented. I have no doubt that AFN will succeed due to the direction and management that Mr. Kewley has provided. His ability to manage and reconstruct the Division has been facilitated with the upmost respect and professional demeanor.

I am confident Mr. Kewley would succeed in any area he chooses to pursue, and he would be greatly missed by his staff, peers, city personnel, and the citizens of Ashland. I wish him the best of luck and good fortune in the future.

Sincerely,



Mary McClary

Administrative Analyst

City of Ashland

Mary.McClary@ashland.or.us

(541) 552-2305

February 21, 2019

To Whom It May Concern,

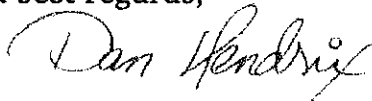
As the City of Ashland's Information Systems Manager, I have had the privilege of watching Donald revitalize the Ashland Fiber Network – not only in terms of increased revenue – but in a way that has energized the community behind it owing to his enthusiasm for delivering great service.

From the very start, Donald hit the ground running with AFN and began a process that has taken the organization to new levels: rapidly assessing existing resources, analyzing historical obstacles, developing a new budget and marketing strategy, identifying opportunities for improvement within his team, re-imaging all aspects of the service to make it appealing to customers, embracing opportunities for community outreach, and researching new areas for future growth and technical advancement. In the last two years, I have watch Donald expand AFN both geographically and in terms of the services offered, while fostering positive relationships with community members, business owners, and city council.

From working alongside Donald on challenging issues, I know him as a relentless problem-solver with a tireless work ethic, and a strong advocate for training and career development within his team. He is also decisive leader who understands – and can communicate clearly with – both executives and field personnel throughout an organization. I have often been helped by his counsel and expertise.

I believe you'll find, as I have, that Donald is committed to improving his community, his organization, and his team, and he has a background that uniquely qualifies him to do so.

Thanks, and best regards,



Dan Hendrix
dan.hendrix@ashland.or.us
(541) 552-2441



February 20, 2019

City of Palm Coast Florida
160 Lake Avenue
Palm Coast, FL 32164

To whom this may concern:

As the Membership and Business Development Director for the Ashland Chamber of Commerce, I am writing to share Don Kewley's participation in our community and business organization and commend and recommend him for his efforts as such.

The Ashland Chamber of Commerce is a community-oriented Chamber of Commerce which is different from other Chamber models as we do not have a political action committee and focus on the betterment of our broader community and the economy. We have productive and important relationships with our members, community partners and government entities. We produce the largest community events and market our community as an idyllic place to live and work with a quality of life that is unmatched.

The Ashland Chamber has had a wonderful and mutually beneficial relationship with AFN since it was established in 2000. When Don Kewley became our point of contact for AFN our relationship continued and grew with renewed strength and vitality. Upon taking the position, he immediately sought out the Chamber to connect with Ashland and hear how he and his organization could be of best service and grow AFN's presence in the broader community.

Mr. Kewley immediately saw the value of utilizing the established relationship to enhance and grow AFN's presence and usefulness for businesses in Ashland. Through the Chamber, he worked to engage with and create new ways to support the business community in meaningful and appropriate ways as a government entity. He is creative and not afraid to try new ideas or adjust as needed.

It has been a privilege to work with Mr. Kewley in his time at AFN and wish him success in future endeavors.

Sincerely,

Dana Preston
Membership and Business Development Director
Ashland Chamber of Commerce
PO Box 1360 Ashland, OR 97520
members@ashlandchamber.com
(541) 482-3486 ext. 107

Ashland Chamber of Commerce and Travel Ashland (Visitor & Convention Bureau)
PO Box 1360 • Ashland OR 97520 • 110 East Main St. • PO Box 1360 • Ashland OR 97520 • (541) 482-3486 • Fax: (541) 482-2350

ashlandchamber.com

February 21, 2019

To Whom It May Concern:

I work with Donald Kewley at Ashland Fiber Network and I highly recommend him for a position in your organization. Don is an organized and effective supervisor with excellent communication skills and the ability to get things done while working with a diverse group of staff and colleagues. He has an impressive work ethic and displays great dedication to the core values and goals of our organization while continuously working to improve our technical systems and Ashland Fiber Network's relationship with our customers.

Don is a productive manager who excels at proactive leadership as well as tackling new challenges as they arise. While working at the City of Ashland, he has proven that he is able to effectively lead an organization to greater efficiency while developing a team that provides excellent customer service. Don has accomplished this while maintaining a high level of integrity for himself as well as his staff. He is also responsible for the growth of our department and makes excellent use of contacts both locally and regionally to further the goals of Ashland Fiber Network.

Don would be a tremendous asset to your organization and has my highest recommendation. If you have any questions, please contact me and I will be happy to answer them.

Sincerely,



Nicole Graham
City of Ashland
90 North Mountain
Ashland, Oregon 97520
541-973-8901

February 21, 2019

To whom this may concern:

Mr. Kewley (Don) was hired in January of 2017 for the position of Ashland Fiber Network's (AFN) Operations manager.

I began employment with the City of Ashland in 1989 and since 2000 (after early AFN inception) have worked alongside and on special projects with all that have held his current position and the staff that supports it.

Don was tasked with not only taking over the daily running of AFN personnel and services, and moving them into the future, but re-building positive perception with direct departmental staff, other departments, city administration, city council, local business partner franchises (internet service providers (ISP's)), and finally the citizens of the city. As a citizen I have always had AFN services and can testify to how great they are but living in politically charged finger pointing area had seen AFN's perception really low.

Don has successfully re-branded AFN and its products by what I would call honest hard work and communication. He has interfaced with all the players to take what works, and move it forward with an eye towards innovation and future. He has worked inside the office with council and administrative staff to strengthen and sometimes rebuild working departmental relationships. He has worked outside the office with the public (businesses and citizens) to repair and remove negative perception and contribute to mutual successes. He has taken the slumping sales and connections stats and moved them into the positive again. And finally, He is also working hard on taking us (the city) into the future with new types of services and visions.

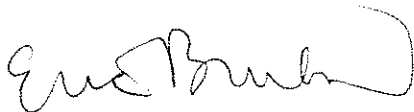
Professionally, I have worked with Don to develop and implement a roving scheduling and trouble ticket communication system for AFN. This has been a great tool helping to unify customer support and interaction between varied and disparate players (ISP's staff and AFN staff). I have found him extremely supportive in the needs of the big picture and direction while not micro-managing the details. He has been a great ear and discussion tool for overcoming some of the hurdles I have faced in combining business logic from several systems to an end solution.

In all honesty and I can say he has been a very positive asset to AFN and the City.

Personally, I have spent time with Don talking on many different things. His positions are quite comforting in they always reflect personal responsibility and what you can do to better things. He has a great attitude and does care about the people he works with. I also appreciate his patience in listening to views and opinions differing from his own.

While I would personally and professionally miss Don, I can't help but to wish him the best. He has been an asset to the City and me, and I am confident this will continue in any new position or endeavor he pursues. If you have any questions please feel free to contact me.

Sincerely,



Eric Bruhn
Business Systems Analyst / Programmer
City of Ashland
eric.bruhn@ashland.or.us
541-552-2407

To whom it may concern,

My relationship with Donald Kewley is unique; not only have I reported directly to him for two years but I was also a member of the hiring committee who chose him to be the Operations Manager for the City of Ashland's Ashland Fiber Network (AFN). What set Donald apart from the other candidates was his vast and diverse experience. I was impressed with his history from laying cable in conduit, to managing state-wide projects, and finally, to achieving his MBA. I knew he was someone who would make decisions based upon his technical knowledge and experience; someone who would utilize logic and reasoning.

One of his first acts upon being hired was to create a two-year budget including financial projections. This would be a challenge for a seasoned long term employee and especially so for a new hire, but Donald's experience and education not only allowed him to succeed with creating a viable budget and projections but to also present and defend his work to vigorous examination by our city council.

Under Donald's leadership, AFN has seen unprecedented growth. In my 13 years with AFN I have not witnessed this same level of continuous growth. In the two years he has been our operations manager, 23 of 24 months have seen a net gain of direct connect customers. We have experienced two years of growth and are now back to customer count levels we have not had in six years.

His successes with AFN are made all the more impressive because he previously had no experience with running an internet service provider or a fiber network. While his MBA and work history gave him a strong foundation from which to lead, he had much to learn regarding the technical aspects. When presented with a challenge, Donald repeatedly demonstrates that he has the fortitude to succeed.

Donald has proven himself to be a leader, a quick learner, a great advocate, and a dedicated manager. He has administered many initiatives at AFN including starting a subsidized service program for low income community members, instituting seven day a week troubleshooting and installation services, creating effective TV commercials, and so many others, all of which have undoubtedly increased our revenue, expanded our presence, enhanced our reputation, and strengthened our stability in the market.

I have no doubt that Donald will make an excellent city manager and success will follow him in his future endeavors.

Sincerely,



Chad Sobotka
Senior Network Engineer
Ashland Fiber Network

MANAGEMENT PROFILE

EVERYTHING **DiSC**
MANAGEMENT

Donald Kewley

Thursday, February 21, 2019

This report is provided by:

Strategic Government Resources, Inc.
PO Box 1642
Keller, TX 76244
1-817-337-8581
www.GovernmentResource.com



WILEY

INTRODUCTION TO DiSC®

Welcome to Everything DiSC®

Donald, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on creating momentum and inspiring others.

Or, maybe you're more comfortable working with those who take a spontaneous, energetic approach than those who work at a steadier, more cautious pace.

Or, perhaps you relate best to people who are more expressive than restrained.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

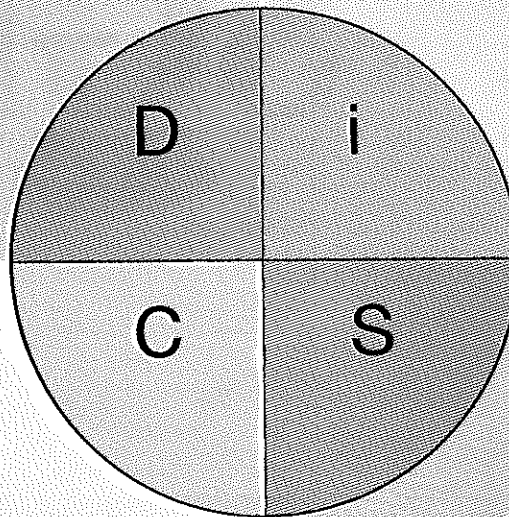
- ▶ All DiSC styles are **equally valuable**, and people with all styles can be effective managers.
- ▶ Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- ▶ **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- ▶ Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- ▶ You can improve the quality of your management experience by using DiSC to build more **effective relationships**.

DOMINANCE

- Direct
- Results-oriented
- Firm
- Strong-willed
- Forceful

INFLUENCE

- Outgoing
- Enthusiastic
- Optimistic
- High-spirited
- Lively



- Analytical
- Reserved
- Precise
- Private
- Systematic

- Even-tempered
- Accommodating
- Patient
- Humble
- Tactful

CONSCIENTIOUSNESS

STEADINESS

YOUR DiSC® OVERVIEW

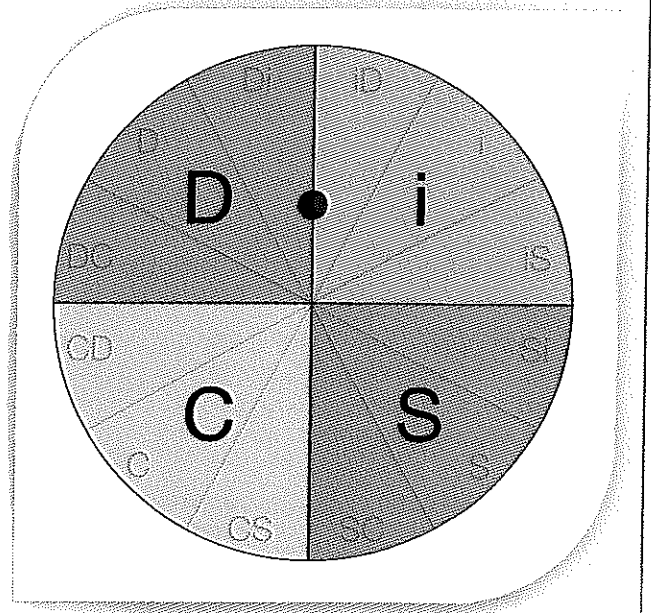
How is this report personalized to you, Donald?

In order to get the most out of your *Everything DiSC Management® Profile*, you'll need to understand your personal map.

Your Dot

As you saw on the previous page, the Everything DiSC® model is made up of four basic styles: D, i, S, and C. Each style is divided into three regions. The picture to the right illustrates the 12 different regions where a person's dot might be located.

Your DiSC® Style: iD



Your dot location indicates your DiSC style. Because your dot is located in the i region but is also near the line that borders the D region, you have an iD style.

Keep in mind that everyone is a blend of all four styles, but most people tend strongly toward one or two styles. Whether your dot is in the center of one style or in a region that borders two, **no dot location is better than another**. All DiSC® styles are equal and valuable in their own ways.

Close to the Edge or Close to the Center?

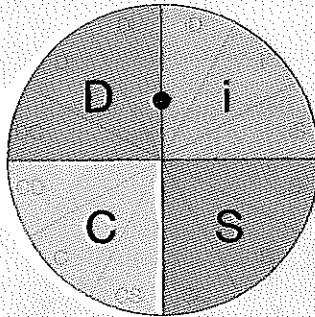
A dot's **distance from the edge** of the circle shows how naturally inclined a person is to encompass the characteristics of his or her DiSC style. A dot positioned toward the edge of the circle indicates a strong inclination toward the characteristics of the style. A dot located between the edge and the center of the circle indicates a moderate inclination. And a dot positioned close to the center of the circle indicates a slight inclination. A dot in the center of the circle is no better than one on the edge, and vice versa. Your dot location is about halfway between the edge of the circle and the center, so you are **moderately inclined** and probably relate fairly well to the characteristics associated with the iD style.

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

YOUR DISC® STYLE & DOT

Your Dot Tells a Story

Your DiSC Style Is: iD



Because you have an iD style, Donald, you're probably a goal-oriented manager who seeks exciting breakthroughs. Most likely, you like having the freedom to set your own course. You may be fairly ambitious, and you're probably attracted to high-profile assignments that will allow you to maximize your talents.

You tend to be passionate and expressive, and your enthusiasm may be contagious. You probably use gestures and anecdotes to emphasize your points, and you tend to speak freely with little concern about filtering your thoughts. The people you manage are probably drawn to your self-assured attitude.

Most likely, you're able to persuade others to adopt your vision. More often than not, your persuasive powers allow you to work toward your goals by gaining the buy-in of the people you manage, which helps create forward momentum. However, people who are more analytical may challenge some aspects of your plans that you have left unaddressed.

In terms of time management, you like to keep an active pace, but you may set optimistic goals and deadlines that are unrealistic. Because you prefer variety, you like to have multiple projects on your plate, and you may dislike sitting still for long periods or being forced into monotonous routines. You enjoy the gratification of kicking off a new project, but after the excitement wears off, your interest may wane.

You're open to taking risks and making decisions based on your gut instinct. Because you're not afraid of the unexpected, you may enjoy the excitement of being spontaneous. In fact, you tend to seize new opportunities, even if it means changing directions. Still, you can be overly optimistic at times, and you may dismiss potential obstacles too quickly.

Because you enjoy having influence, you may strive to be among the inner circle in an organization. Most likely, you want to be heard, and you do your best to make a favorable impression. You appreciate being recognized for your contributions, and you're unlikely to be embarrassed by public recognition. And, because you value such compliments, you may be generous with your praise of others.

Most likely, you enjoy getting to know the people you manage and building on your large network of friends and associates. You're probably fairly open to sharing personal information, even with people you've just met. Because you enjoy making connections, you're happy to introduce people who may have common interests. Furthermore, you may embrace opportunities for friendly banter or brainstorming.

When conflict arises, you probably try to focus on the positive. In fact, you may even try to brush unpleasant issues under the rug for as long as possible. However, if things become heated, you're more likely to express your feelings than to shut down. While venting your emotions may seem cathartic to you, it may make others around you uncomfortable.

Donald, like others with the iD style, your most valuable contributions as a manager may include your ability to initiate change, your passion, and your drive toward results. In fact, these are probably some of the qualities that others admire most about you.

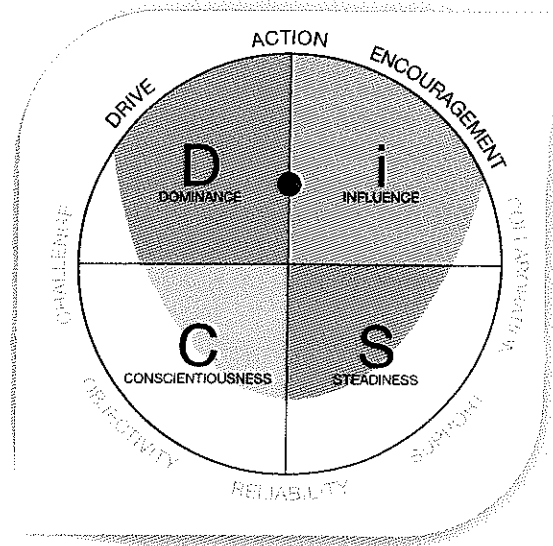
YOUR DiSC® PRIORITIES & SHADING

Your Shading Expands the Story

Donald, while your dot location and your DiSC® style can say a great deal about you, your map **shading** is also important.

The eight words around the Everything DiSC map are what we call **priorities**, or the primary areas where people focus their energy. The closer your shading comes to a priority, the more likely you are to focus your energy on that area. Everyone has at least three priorities, and sometimes people have four or five. **Having five priorities is no better than having three, and vice versa.**

Typically, people with your style have shading that touches **Action, Encouragement, and Drive.**



What Priorities Shape *Your* Management Experience?

► Taking Action

Donald, like other managers with the iD style, you tend to strive for excitement and forward momentum. Hesitancy may frustrate you, and you may grow impatient with people who fail to keep up with your rapid pace. Because you emphasize action, you may do your best to inspire your team to seek out those ideas that can make the biggest immediate impact.

► Providing Encouragement

Because you want members of your team to feel good about their contributions, you usually emphasize the positive when discussing their performances. Most likely, you have a knack for persuading people without coming across as pushy, and your passion may often be contagious. You tend to focus on providing encouragement to help ensure that people feel energized and optimistic about their work.

► Displaying Drive

Managers with the iD style set ambitious goals and encourage their teams to share this focus on achievement. Most likely, you're willing to take short-cuts or risky leaps if they could yield bigger, more immediate payoffs. Furthermore, you often set the bar high for your team and won't settle for minor victories. You focus on getting results and having the drive it takes to succeed.

YOUR MANAGEMENT PREFERENCES

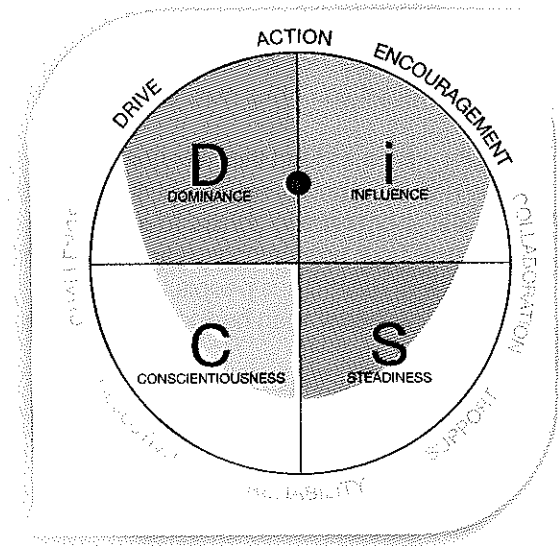
What Do You Enjoy About Managing?

Different people find different aspects of their work motivating. Like other people with the iD style, you may enjoy helping others in their professional development while leading them toward common goals. In addition, you likely appreciate that, as a manager, you can help establish an energetic and collaborative environment where the team can achieve greater results together than members might have accomplished individually.

You probably enjoy many of the following aspects of your work:

MOTIVATORS

- Developing relationships with others
- Helping people work together
- Creating a dynamic environment
- Achieving immediate results
- Increasing enthusiasm and momentum
- Leading a team toward a challenging goal
- Inspiring others to do their best
- Recognizing the good works of others
- Setting lofty goals



What do your priorities say about what motivates you and what you find stressful?

What Drains Your Energy as a Manager?

Then there are those management responsibilities that are stressful for you. Because you tend to keep such an energetic pace, you may become frustrated if projects become stalled or you perceive time is being wasted. Furthermore, you may dislike it if you have to rein in your pursuit of innovative results because the organization has different priorities.

Many of the following aspects of your work may be stressful for you:

STRESSORS

- Sustaining interest in routine projects
- Moderating your pace for others' benefit
- Following strict rules or protocols
- Working steadily toward long-term goals
- Being forced to give up on bold ideas
- Providing step-by-step training
- Using a systematic approach
- Slowing down to assure accuracy and quality
- Analyzing options in-depth

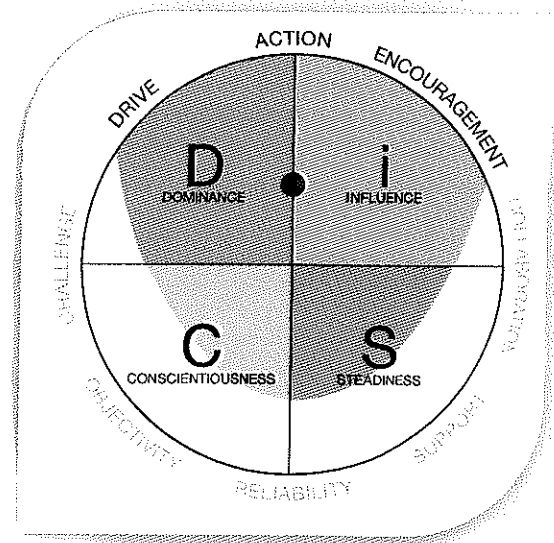
YOUR DIRECTING & DELEGATING STYLE

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

Donald, because you **emphasize action**, you tend to move quickly when directing others. You probably try to get the people you manage excited about their tasks and the potential for innovative solutions. However, your fast pace may cause important tasks to slip through the cracks.

You also have a **strong drive for results**. Therefore, you may push others to execute plans that will make the biggest impact on the bottom line. Still, people may be motivated, but in the rush may be left without the information and resources they need to do their best work.

Because you **focus on encouragement**, you're probably willing to give team members new responsibilities, pushing them to reach higher levels of performance. However, in your eagerness to tap into their potential, you may overestimate their abilities.



How Do You Approach Directing & Delegating?

STRENGTHS

- Making people feel that they are important contributors
- Encouraging creativity in the execution of tasks
- Getting people and projects moving
- Pushing others to reach their potential
- Generating enthusiasm
- Ensuring that people understand the need for results

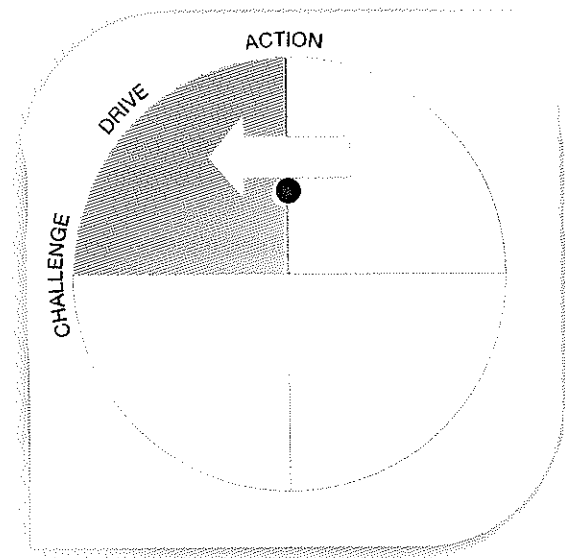
CHALLENGES

- Pushing people to complete their tasks
- Judging people's abilities or competencies, without overestimating them
- Listening to people's concerns about assignments
- Considering the needs of others
- Highlighting the importance of routine tasks
- Creating a reliable setting

DIRECTING & DELEGATING TO THE D STYLE

How Does the D Style Like to Work?

Like you, people with the D style prioritize the bottom line and are driven to get results. Because they display a great deal of initiative, they may be eager for you to give them ambitious or creative tasks, which you probably appreciate. However, while you both strive for success, they may be willing to disregard other people's feelings in the pursuit of accomplishment, a sacrifice you'd prefer not to make. In fact, they are less interested than you are in staying connected with the team and probably don't require the encouragement you tend to offer.



Potential Problems When Working Together

People with the D style are often questioning and skeptical and may challenge your authority at times. They're unlikely to simply follow orders and may think that they know best, even making decisions without consulting you. While you both tend to be outspoken, you're more likely to focus on the positive when disagreements occur, which is a tendency they don't share. Furthermore, you may try to win an argument through persuasion while they're more inclined to become blunt and forceful.

How to Be Effective with the D Style

Like you, people with the D style are fast-paced. They are willing to take risks if it will get them the results they want, and they often look for new or exciting projects. Therefore, show them the big-picture purpose of the task and how it can lead to impressive outcomes. Show respect for their bold ideas and decision-making ability if they have exhibited sound judgment in the past, and if they are inexperienced, make sure that their ambition doesn't exceed their qualifications or skills. Either way, make sure to check in with them and see that they haven't bitten off more than they can chew.

If they're less experienced:

- Don't confuse confidence with competence.
- Check their understanding of assignments before they move ahead.
- Establish agreement about the type of decisions that will be left to them.
- Have them check with you before any risky decisions are made.
- Let them know that they will be given more autonomy as they gain experience.

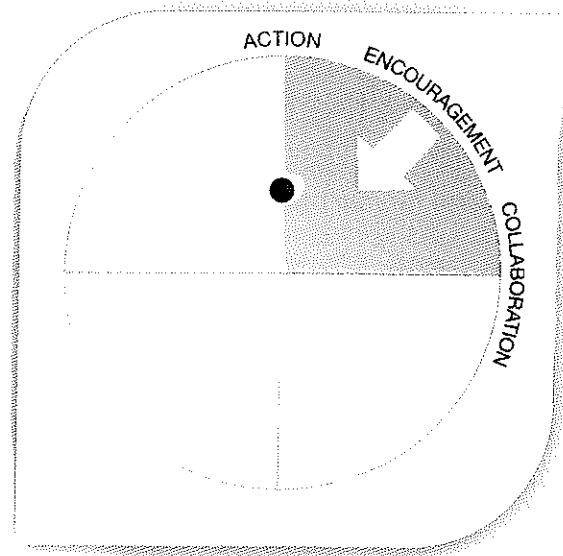
If they're more experienced:

- Show them the most practical way to be productive.
- Be direct about the results you expect.
- Set a deadline and let them figure out how to proceed.
- Make sure they understand the consequences of their shortcuts.
- Specify the limits of their authority while still allowing for some autonomy.

DIRECTING & DELEGATING TO THE i STYLE

How Does the i Style Like to Work?

Like you, people with the i style are generally upbeat and optimistic. You're both usually sociable and openly expressive, and they probably appreciate your tendency to provide them with encouragement. They need little prompting to share their opinions, and while you may identify with their passion, you may be more interested than they are in getting down to business. Furthermore, despite their high energy, they're probably less driven to make a big impact than you tend to be.



Potential Problems When Working Together

People with the i style want a fun, collaborative work environment, preferring to engage with others and make personal connections. They like being in front of people and tend to be passionate about building team spirit. While you may share their enthusiasm for adventurous ideas, you're probably more focused on the bottom line than they are, and you may find their constant need to socialize a bit distracting at times. Furthermore, your tendency to push for your own objectives may come across as insensitive to them.

How to Be Effective with the i Style

Like you, these individuals want to move quickly. They share your tendency to improvise and make spontaneous decisions. Therefore, you may need to provide clear expectations and a firm structure that will prevent them from making things up as they go. Check in frequently with those who lack experience to make sure they're on track to meet deadlines. For those who are more experienced, encourage innovation and experimentation, but hold them accountable for timelines and results.

If they're less experienced:

- Make sure they don't lose track of details.
- Hold them accountable for missed deadlines or skipped steps.
- Help them prioritize.
- Ensure that they follow through on their tasks.
- Check their understanding since their enthusiasm might hide a lack of clarity.

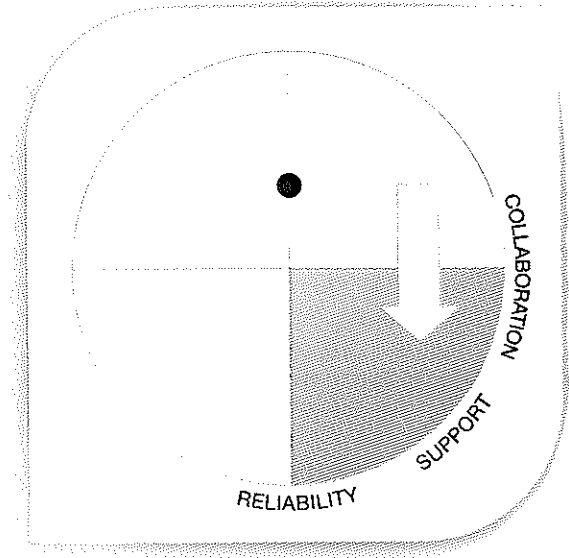
If they're more experienced:

- Allow them to take the lead in group settings.
- Make time to go over the details with them.
- Let them try out new ways to look at problems.
- Acknowledge their contributions publicly.
- Keep them on track and on schedule.

DIRECTING & DELEGATING TO THE S STYLE

How Does the S Style Like to Work?

People with the S style are often accommodating and flexible. They accept direction easily and will seldom push for more authority, but they may need more hands-on support than you naturally provide. In order to avoid confrontation, they may often keep their concerns to themselves. Consequently, their hesitation to speak up or assert themselves could mean that their ideas get lost or overwhelmed. As a result, you may not know about their discomfort until it's too late.



Potential Problems When Working Together

These individuals appreciate a methodical pace and a calm, orderly environment. Therefore, they may view the fast-paced setting that you prefer as intimidating or stressful. Abrupt changes in plans can rattle them, so your tendency to make quick adjustments in the name of rapid progress may leave them disoriented. In addition, they seek well-established systems for accomplishing tasks, while you're usually willing to improvise. As a result, they may want more stability from you, while you may become frustrated with their cautiousness.

How to Be Effective with the S Style

People with the S style may be most comfortable in friendly, collaborative environments. They want to make sure that they're on the same page as other people and to be part of a cooperative team. Since you tend to place less emphasis than they do on group efforts, they may wish for a greater sense of team harmony. Be straightforward about your expectations, but let them know you're available to help if needed. Make an effort to allow people to work together and to reward productive teamwork.

If they're less experienced:

- Give clear, step-by-step directions.
- Check in with them frequently.
- Refrain from giving them too much responsibility too quickly.
- Ask questions to confirm their understanding.
- Avoid pushing them to move ahead before they are ready.

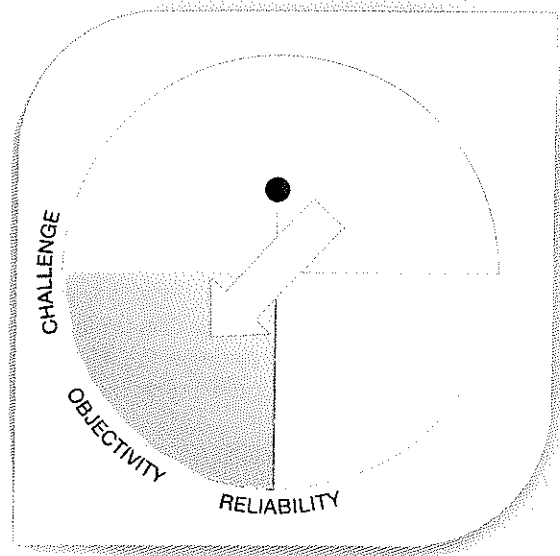
If they're more experienced:

- Ask them directly what kind of support they need.
- Encourage them to take initiative.
- Make yourself available as an advisor.
- Give them additional responsibilities when they seem ready for more challenges.
- Ask enough questions to elicit their concerns.

DIRECTING & DELEGATING TO THE C STYLE

How Does the C Style Like to Work?

People with the C style relate best to clear objectives and fact-based ideas. They strive for quality results, taking the time to analyze concepts and examine the possibilities. Because they are comfortable working alone, they may require only minimal face time. In fact, in their pursuit of logical solutions, they may isolate themselves and make decisions without consulting you or the team. But since you tend to skip the specifics, you may not notice the full impact of their decisions for some time.



Potential Problems When Working Together

These individuals want to produce dependable outcomes, so they tend to thoroughly consider all the consequences before choosing a plan. Therefore, they may not appreciate your tendency to emphasize immediate progress and momentum. They prefer a cautious approach, which is in contrast to your tendency to move quickly and boldly. Consequently, they may become annoyed if you pressure them to multi-task or rush their efforts. In turn, you may grow weary of their tendency to go over solutions repeatedly at the expense of making rapid progress.

How to Be Effective with the C Style

People with the C style want to work in an environment where they feel free to point out flaws and question inefficiencies. You may believe that their objections stifle creativity, but they are more concerned with high quality. Remember that just because they're frequently skeptical of new ideas doesn't mean that they're resistant to your authority. They may spend too much time perfecting their work, so be sure to keep them moving forward. For those with more experience, allow increased autonomy, but set clear deadlines that reinforce a sense of urgency.

If they're less experienced:

- Avoid forcing them to collaborate unless it's necessary.
- Help them achieve quality without putting deadlines at risk.
- Communicate with clarity rather than enthusiasm.
- Make sure they have the resources they need.
- Check in to make sure they aren't getting bogged down.

If they're more experienced:

- Check in when necessary to ensure forward progress.
- Encourage them to ask for more direction if they need it.
- Listen to their concerns about quality.
- Allow them to work independently when possible.
- Give them opportunities to help solve complex issues.

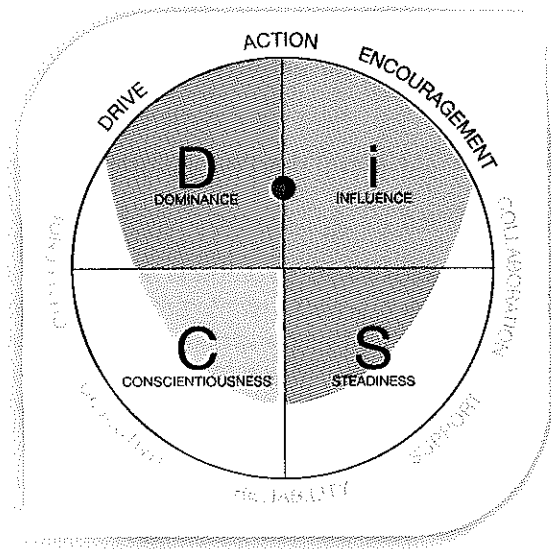
MOTIVATION AND THE ENVIRONMENT YOU CREATE

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

Donald, your **preference for action** helps create a sense of urgency that may be contagious. The people you manage may feel energized by your fast pace and quick decision making, which could help them to maintain momentum.

Because you are **enthusiastic and encourage others**, you may create an environment where people feel recognized and accepted. You help them see that work can be fun, and as a result, they're more upbeat and optimistic about their tasks and contributions.

Most likely, by **driving toward success**, you create a setting where people believe that anything is possible. As a result, you may encourage others to strive for more ambitious goals than they would otherwise have considered.



The Environment You Create

- Your high energy keeps others on their toes.
- Your decisiveness can help people feel confident in moving forward.
- Because of your encouragement, people feel enthusiastic about their work.
- Because of your drive, people strive for solid results.
- When you celebrate victories, people feel more ownership in the outcomes of their work.
- When you share your vision, people understand how their goals fit into the big picture.

MOTIVATION AND THE D STYLE

What Are the Motivational Needs of the D Style?

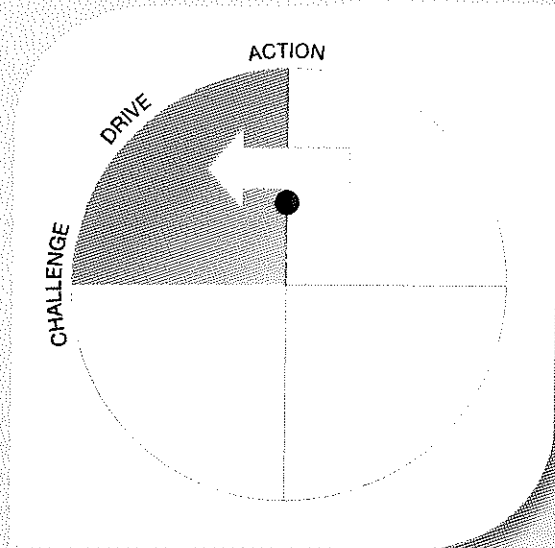
Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. Like you, they're driven to achieve, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, they share your desire to move quickly and want to make a big impact with innovative or daring ideas. In fact, they may be so focused on individual career growth that they disregard the needs of others, and you may have trouble understanding their challenging approach.

What **demotivates** the D style?

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

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

- Employees with this style may embrace conflict as a way to create win-lose situations.
- They may be energized by the competitive aspects of conflict.
- They may waste energy dwelling on who is at fault.



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

- Help them set results-oriented goals.
- Allow them to work independently when possible.
- Give them reasonable control over their work environment.
- Create opportunities for competition, but not at the expense of the team.
- Provide them with challenging problems to solve.
- Make new projects more compelling by outlining their big-picture importance.

What's the best way for you to **recognize and reward** the D style?

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

MOTIVATION AND THE i STYLE

What Are the Motivational Needs of the i Style?

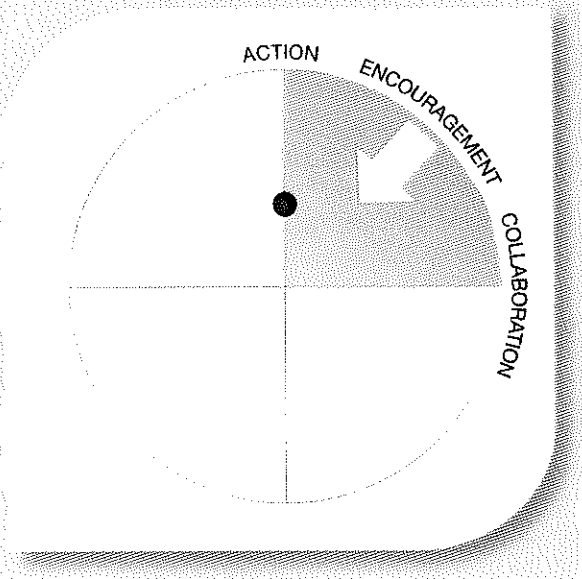
Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. Unlike you, they're eager to collaborate, so they may put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they often move quickly and indulge in a variety of tasks, and you probably don't have much trouble keeping up with their fast pace. Those with the i style are also motivated by public recognition, and like you, they appreciate a warm and encouraging environment.

What **demotivates** the i style?

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

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

- Conflict may make them emotional or angry, and as a result may negatively affect their performance.
- They may take conflict personally, which could de-energize them.
- They may dwell on the conflict rather than focus on their tasks.



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

- Provide encouragement even when delivering tough feedback.
- Encourage their positive energy, and give them opportunities to express themselves.
- Limit the predictability and routine of their tasks when possible.
- Reinforce their optimism with your natural enthusiasm and energy.
- Give them opportunities to be in the limelight.
- Provide some time to socialize without compromising results.

What's the best way for you to **recognize and reward** the i style?

- Reward them with enthusiastic public praise, and underscore your appreciation for their passion.
- Give them credit for their ideas that contribute to organizational success.
- Recognize their growth by providing opportunities to network with key players in the organization.
- Tell them how much others appreciate the energy and people skills they bring to the team.

MOTIVATION AND THE S STYLE

What Are the Motivational Needs of the S Style?

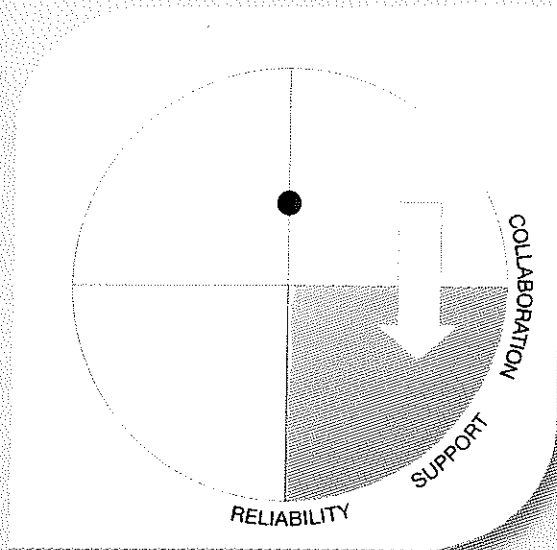
People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. They want to be supportive of people, and may even withhold their own opinions to accommodate the needs of others, which is a tendency you may not identify with. In addition, they like to connect with colleagues on a personal level, and they may value working in a collaborative setting more than you do. Furthermore, they want to be seen as reliable and to have enough time to perform their duties without being rushed or stressed, which probably isn't as important to you.

What **demotivates** the S style?

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

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

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



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

- Give them ample time to achieve results, which may require you to slow your pace at times.
- Let them collaborate with others, but don't push them to be more social than they want to be.
- Provide clear instructions as well as the information and resources they need to do their best work.
- Plan ahead to be able to give plenty of warning when changes are coming.
- Give them the structure and security they need to feel comfortable.
- Ask for their ideas, which they might not share without encouragement.

What's the best way for you to **recognize and reward** the S style?

- Let them know that they've earned your trust by giving them more important projects.
- Reassure them with sincere praise, but avoid putting them in the spotlight.
- Share the credit when their support helps you nail a critical project.
- Suggest opportunities for advancement when you suspect they're ready, since they aren't likely to ask.

MOTIVATION AND THE C STYLE

What Are the Motivational Needs of the C Style?

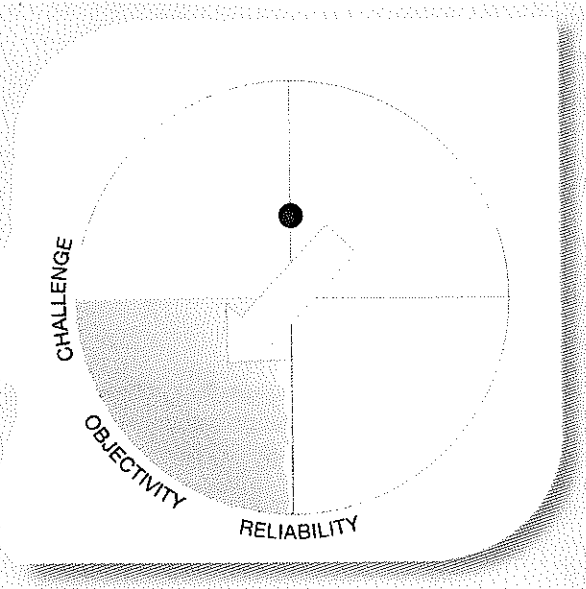
Employees with the C style look for an environment where they will have time to analyze ideas and ensure flawless outcomes. They want to produce work that's reliable, so they prefer to maintain a moderate pace and exercise a sense of caution, which isn't one of your top priorities. Because they tend to be even more objective than you are, they like to weigh all the options and gather all the facts before making decisions. Also, they want to master their responsibilities, so they often challenge ideas to ensure accuracy, an approach you probably don't share.

What **demotivates** the C style?

- Being required to work collaboratively
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Having to make quick decisions
- Being wrong

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

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



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

- Avoid pressuring them to keep up with your fast pace.
- Explain the purpose of tasks logically rather than enthusiastically.
- Encourage them to help define quality standards.
- Allow them to ask questions and collect information before making decisions.
- Provide opportunities for independent work.
- Convey your expectations clearly and specifically.

What's the best way for you to **recognize and reward** the C style?

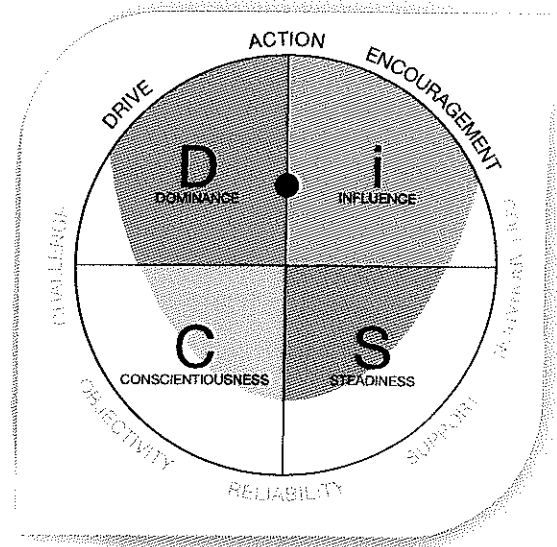
- Praise their performance and expertise in private, and be sure to include specific examples.
- Recognize their focus on accuracy as a vital piece of the team's success.
- Find new ways to utilize their talents, including analysis, logic, and problem solving.
- Reward them for quality outcomes by giving them more freedom to work independently.

YOUR APPROACH TO DEVELOPING OTHERS

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

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

Donald, your action-oriented nature inspires people to pursue their goals with passion and energy. Most likely, the people you manage sense your genuine desire for them to thrive and feel comfortable coming to you for development advice. Because you tend to be optimistic, you may encourage them to overcome difficulties and set ambitious objectives. Your friendly approach to mentoring leads you to collaborate with them and create personalized development plans. In such plans, you're likely to encourage quick action and creativity as they find ways to use their strengths. Overall, you strive to help people feel challenged by their work and optimistic about their professional development.



Your Development Approach

ADVANTAGES

- Pushing people to move quickly in their development
- Encouraging creative or daring ideas for people's development
- Boosting others' self-confidence with your belief in their abilities
- Pushing people to hone their skills
- Inspiring people to think big
- Motivating others to do what they set out to do

DISADVANTAGES

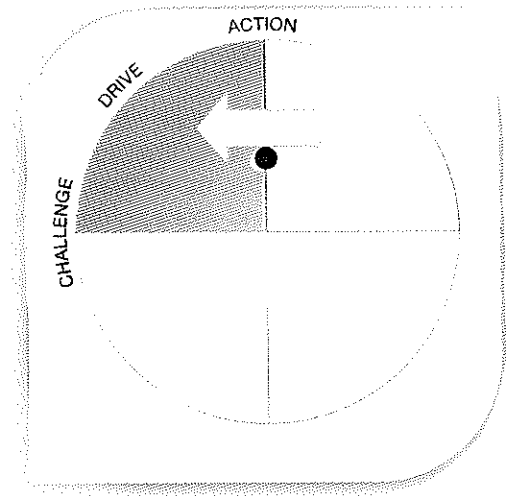
- Being unrealistically optimistic about some people's development options
- Failing to take a long-range view of people's development needs
- Pushing people at a pace that doesn't allow them time to develop necessary skills
- Forcing people to develop in ways that contribute to your own agenda
- Failing to consider whether development plans are well-suited to the person
- Neglecting to identify specifics about development plans

DEVELOPING YOUR "D" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Drive

People with the D style are dynamic go-getters, and like you, they are driven to get quick results. However, they are less concerned with people's feelings than you are and may struggle with teamwork. Encourage them to set personal goals that will benefit the organization and explain how this will contribute to their success. Lack of control may stifle their motivation, so encourage their autonomy while holding them accountable.

- Help set development goals that are beneficial to both the employee and the organization.
- Reinforce their ambition and autonomy but be prepared to keep them on track.
- Encourage them to create ambitious development plans and believe in their potential.

Action

Like you, these individuals move quickly. As a result, you both may overlook the need for detailed, long-term development plans. While they hope for opportunities that lead to immediate growth, this may not be realistic. Discuss how their strengths fit into the big picture and think creatively to set strategic development goals.

- Help them slow down to look at other development opportunities.
- Review the big picture and encourage them to come up with strategic long-term goals.
- Make sure they understand how much work will be needed to achieve their bold goals.

Challenge

People with the D style may offer terrific solutions because of their tendency to question the status quo, but don't be surprised if they question you, too. These individuals may reveal their stubborn streak when you suggest development opportunities that differ from their own vision. Give them a chance to explain the benefits of their own plans, but don't forget to assert your authority by redirecting them when necessary.

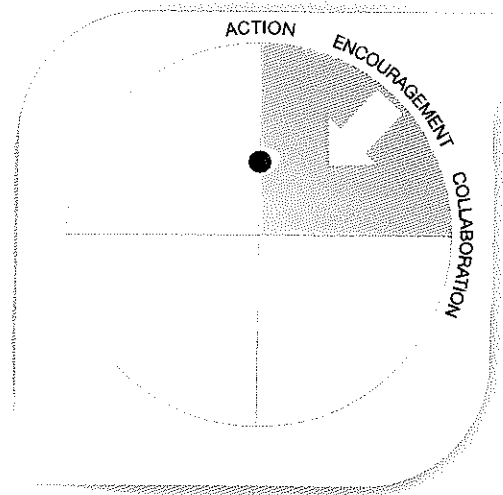
- Respond to any resistance by explaining how your ideas will benefit them.
- Don't allow yourself to engage in a power struggle.
- Encourage creativity without giving up your own authority.

DEVELOPING YOUR “I” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Encouragement

Like you, people with the i style feel validated by recognition and positive feedback. Since you're usually very upbeat, this may come naturally to you. Poor performance on their part may be more difficult for you to confront, but you won't do them any favors by avoiding negative feedback when it's necessary.

- Continue to be optimistic when assessing their development, but don't ignore problems.
- You may need to give tougher feedback at times.
- Check to make sure they understand your feedback.

Action

These individuals may become impatient with nitty-gritty details and projects that require comprehensive analysis. Like you, they are more interested in fast-paced innovation and generating ideas. Since you share this quality, it may be challenging for the two of you to slow down and give your attention to in-depth development plans.

- Avoid letting your mutual zeal obscure important details or potential issues.
- Point out the negative consequences of not taking the time to develop skills with deliberate effort.
- Encourage their spontaneity when appropriate.

Collaboration

People with the i style love working with other people, and this can be a great source of strength in their development. In a group setting, however, they might sometimes rely on others to carry their weight. Consequently, this may enable them to avoid personal accountability and growth.

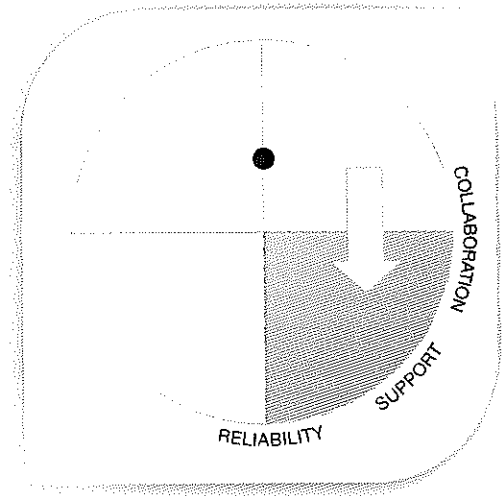
- Encourage them to pursue development opportunities that involve some collaboration.
- Allow them to lead small groups.
- Remind them that their growth will also depend on independent work.

DEVELOPING YOUR “S” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Support

People with the S style want to know that they're meeting your needs and expectations. However, your fast pace might keep you from slowing down to give them the reassurance and emotional support that they need. In addition, because you tend to emphasize the positive, you may not push them to overcome obstacles hindering their development.

- Push them gently to grow and develop.
- Look for situations where supporting others will boost their own development.
- Show patience and understanding for their fears and concerns.

Reliability

They like stability, and they may enjoy a more structured approach to their professional development. Keep in mind that bold or adventurous ideas may be unsettling to them. Engage them in a dialogue about their options since they may be uncomfortable speaking up about their concerns.

- Give them time to warm up to ideas that involve a lot of change.
- Work with them to create specific development plans.
- Help them create a development plan that includes a healthy mix of stability and growth.

Collaboration

People with the S style find pleasure in working with others, so they may rely too heavily on development opportunities that allow for collaboration. Because you worry about how other people feel, you may avoid digging too deeply into this issue. Keep in mind that your constructive criticism could help them down the line.

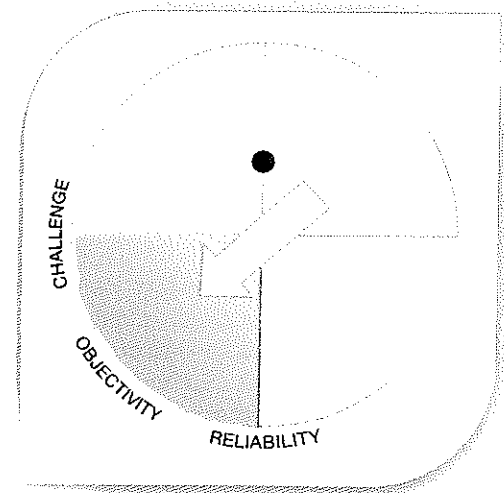
- Encourage them to pursue collaborative opportunities while furthering their own development.
- Show them that they have the skills to work autonomously.
- Remember that they don't value individual accomplishment as much as you do.

DEVELOPING YOUR “C” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Objectivity

People with the C style usually rely on logic to guide their decisions, so they're unlikely to share your preference to take a more intuitive approach. When creating development plans together, you may need to consider that they are more concerned with progressing rationally, and this may be at the expense of team unity or people's feelings.

- Steer them toward analytical development opportunities.
- Respect their independence, but remind them that you can be an advocate for their development.
- Avoid forcing them to socialize, but stress the importance of teamwork.

Reliability

These individuals want to be seen as dependable, so they probably avoid exposing themselves to the possibility of failure. Therefore, they're probably less interested in the daring or innovative development ideas that you may propose. While they probably respond well to logical, low-risk development plans, you may need to push them to consider bolder options that provide greater opportunities for growth.

- Propose clear, well-organized development opportunities.
- Recognize that they may struggle to admit their limitations or errors.
- Ensure that they see the drawbacks of playing it safe.

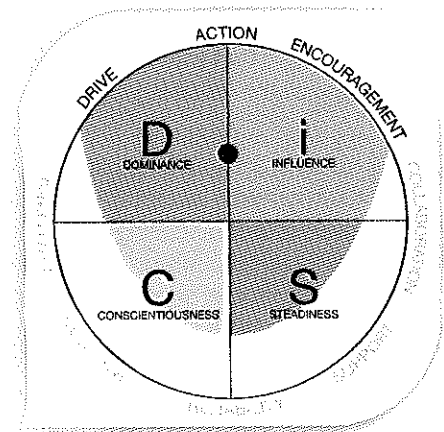
Challenge

People with the C style may be inflexible about changing directions, so they may resist the new ideas that you propose for their development. They are more skeptical and cautious than you are, and this means they'll often want to verify facts and ask a lot of questions before proceeding.

- Give them time to think over your suggestions before making final decisions together.
- Expect that you'll have to back up your ideas with evidence if you want buy-in.
- Field their questions, but hold them accountable if they become disrespectful.

HOW YOUR MANAGER SEES YOU

One of the most important but often overlooked aspects of management is sometimes called "managing up." This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. This page provides insight into how your manager might see you.



► Active

Donald, since you have an iD style, you probably come across as energetic and fast-paced. Your dynamic nature may give your manager confidence that you'll boldly move ahead on projects and urge others to keep up. On the other hand, some managers may think that you'll lose interest in an idea after the initial excitement has worn off.

- Your manager may see shortcuts as evidence of sloppy work.
- Some managers may find your more adventurous ideas to be impractical or unrealistic.

► Encouraging

Many managers will appreciate that you tend to be upbeat and animated, feeling confident that you'll build a positive environment for your team. In fact, your passion and enthusiasm may cause many managers to see you as an inspiring leader. On the other hand, some managers may believe that you get caught up in enthusiasm too easily, while others may think you're too quick to dismiss negative information.

- Some managers prioritize facts over inspiration.
- Your manager may see your high energy as a barrier to realistic solutions.

► Driven

Because you tend to set ambitious goals, many managers probably see you as someone who can move the team toward new accomplishments. And since you like to create a compelling vision and rally people around it, your manager is likely to view you as a bold leader. However, there may be some managers who consider you to be too forceful or outspoken in pushing for your agenda.

- Your manager may see you as overly insistent or demanding when you're pushing toward your goals.
- Your manager may believe that you're too focused on your own agenda.

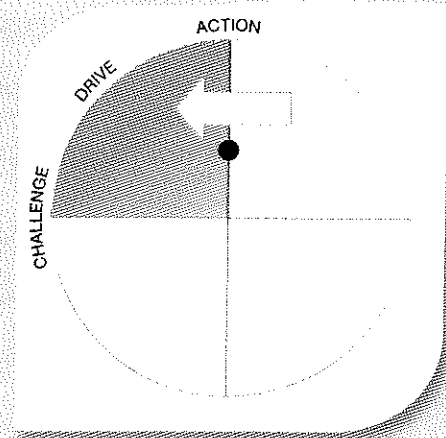
WORKING WITH "D" MANAGERS

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

Their Priorities & Preferences

Managers with the D style put a strong emphasis on drive and are active in pursuing bottom-line results. They can be demanding and blunt and won't hesitate to voice their skepticism. Overall, they respond best to people who can quickly help them achieve success.

- Like you, their driven nature means that they will do whatever it takes to reach their goals.
- Like you, they prioritize action and want to keep progressing at a rapid pace.
- Unlike you, they tend to openly challenge the status quo and pressure others to meet their high standards.



Advocating & Getting Buy-In

Managers with the D style are driven to get concrete results, so you may get buy-in by showing how your plan will impact the bottom line. And because they respect confidence, your natural self-assurance might help your ideas get serious consideration. Like you, they want to keep things moving quickly and may become frustrated when something or someone slows progress. As a result, your energetic approach will probably appeal to them. Still, they may respond negatively if they think you're trying to schmooze them, so avoid being overly enthusiastic when presenting your solutions. In addition, remember that they need to feel in control and will dismiss an idea if they believe you disregarded their advice or sidestepped their authority. Therefore, be sure to show respect for their leadership by asking for their guidance and keeping them in the loop.

- Keep the focus of your discussions on the bottom line.
- Emphasize the concrete, practical results that they want.
- Avoid coming across as overly enthusiastic or passionate.

Dealing with Conflict

Managers with the D style can become competitive in conflict, creating win-lose scenarios without room for compromise. They aren't inclined to avoid confrontation, and while you may share their tendency to address issues head-on, you probably prioritize positive relationships more than they do. They're less likely to express feelings than you are and may be more frank and challenging when faced with a disagreement. Avoid viewing their directness as a personal attack and resist the urge to reciprocate their aggression. Instead, share your needs and state your points objectively without getting defensive.

- Keep the discussion focused on the issue at hand.
- Let them know when you need to have your feelings acknowledged.
- Stick to the facts and avoid hot buttons.

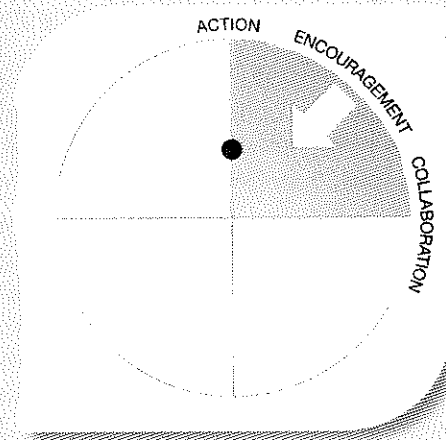
WORKING WITH “I” MANAGERS

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

Their Priorities & Preferences

Managers with the i style tend to be energetic and encourage others to do their best. Overall, they want to lead a fast-paced but friendly team, and they will likely respond best to people who like to create an optimistic team spirit.

- Like you, they give people recognition and celebrate group victories.
- Unlike you, they prefer to work with others and prioritize teamwork.
- Like you, they focus on action and move quickly while striving for forward progress.



Advocating & Getting Buy-In

Managers with the i style look for cooperation and want to know how your plans will affect other people. Because they believe collaboration leads to better outcomes, they're interested in finding ways to interact. To gain their buy-in, show them how your solution can invigorate people, and explain how team members can work together to reach your goals. Keep in mind that they focus less on the bottom line than you usually do, so work to create an open dialogue that emphasizes both teamwork and results. Furthermore, like you, they're interested in fast movement and groundbreaking solutions, so lay out the big picture and assure them that things will happen quickly once you have their buy-in.

- Show passion for your ideas, but be receptive to their input
- Frame discussions in terms of the effect on people rather than just bottom-line results.
- Emphasize how your ideas can quickly energize people.

Dealing with Conflict

Managers with the i style want to maintain friendly relationships, so they may initially gloss over differences to avoid conflict. However, self-expression is very important to them, so they may insist on making their feelings clear when things get tense. Furthermore, you both may lose focus and stray into other areas of discontent, which could escalate the conflict. Be careful not to reciprocate personal attacks, and try to work through problems quickly but thoroughly. Show that you want to maintain a good relationship, and let them know that a disagreement now doesn't mean a poor relationship down the road.

- Avoid becoming defensive.
- Show empathy, but address issues directly.
- Let them know that disagreements won't jeopardize your relationship.

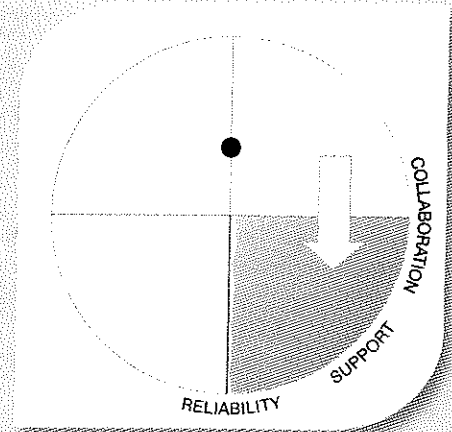
WORKING WITH "S" MANAGERS

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

Their Priorities & Preferences

Managers with the S style tend to be accommodating and dependable. Overall, they want to lead a team in a calm setting where tension is rare, and they will likely respond best to people who are friendly team players.

- Unlike you, they emphasize people's feelings and are more concerned with maintaining relationships than you tend to be.
- Unlike you, they would rather work collaboratively than independently.
- Unlike you, they often dodge change in order to maintain a dependable setting.



Advocating & Getting Buy-In

Managers with the S style want to see how your ideas can contribute to reliable results and steady progress. They're less spontaneous and energetic than you tend to be, so excessive enthusiasm is unlikely to help gain their buy-in. If you want their attention, present your ideas clearly and methodically. While the big picture and bottom line are important, be ready with details to address their concerns. Give them time to prepare for any major changes that you want to suggest, and avoid pressuring them for a quick decision. Furthermore, they're interested in collaboration and team unity. So rather than focusing solely on bottom-line results, point out how your solution can create opportunities to bring the group together. Be prepared to discuss the practicality of your idea.

- Lay out your plan in a step-by-step manner.
- Give them time to consider the effects of your idea.
- Avoid overselling your idea by relying on an enthusiastic presentation.

Dealing with Conflict

Managers with the S style want to avoid conflict whenever possible, so they may gloss over differences or even deny there is a problem. If they believe they can maintain friendly relationships by giving in, they may withdraw from the situation. In such cases, don't assume their silence means the matter is resolved. If you allow them to bury their feelings, resentment may build. Therefore, work to uncover the true source of the problem, and express concern for their needs. Be diplomatic and patient, and let them know that you want to resolve the situation quickly but thoroughly.

- Address the situation directly but tactfully.
- Don't assume that their silence means they agree with you.
- Show them that you care about their feelings.

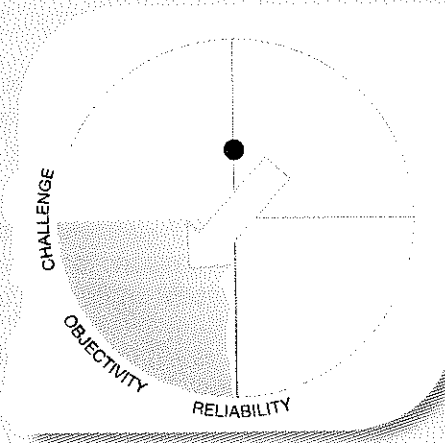
WORKING WITH “C” MANAGERS

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

Their Priorities & Preferences

Managers with the C style put a strong emphasis on logic and maintaining a stable environment. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

- Unlike you, they spend a lot of time on objective analysis to ensure accuracy.
- Unlike you, they tend to move cautiously in order to deliver a reliable outcome.
- Unlike you, they tend to show open skepticism for ideas that aren't backed up by facts.



Advocating & Getting Buy-In

Managers with the C style want to see how your ideas can lead to a high-quality solution. They want to anticipate potential complications, so they're likely to ask a lot of skeptical questions. Because they may interpret excessive enthusiasm as manipulative or a potential cover-up for flaws, present your ideas clearly and systematically. Furthermore, they're more interested in reliability than speed, so you may need to slow down and show them that you've thought through all of the consequences of your plan. They'll be more open to your ideas if you minimize surprises and limit unnecessary risks. By giving them the information they want and the time to process it, you'll have a better chance to get them on your side.

- Lay out your plan clearly and systematically.
- Be prepared with enough facts and data to help them reach a decision.
- Avoid pushing them to move more quickly as they may distrust your motives.

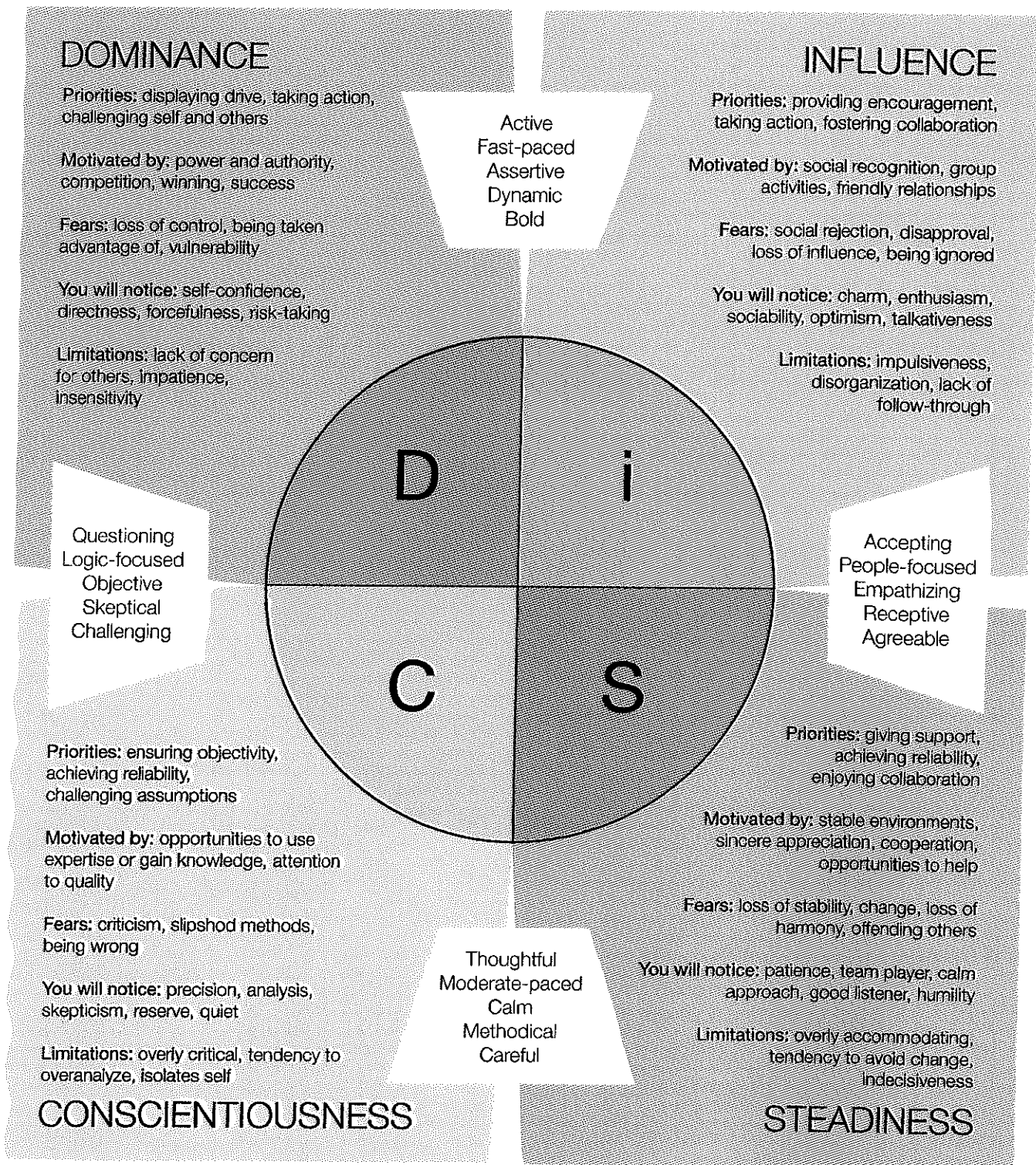
Dealing with Conflict

Managers with the C style view conflict as a disagreement over who is correct, so they may try to overpower opposing viewpoints with logic. They want to remain objective, so they tend to dodge direct aggression and withdraw from emotionally charged situations. Therefore, avoid becoming impatient or emotional during confrontations, or they may end the discussion prematurely. Don't take things personally, and refrain from bringing up other issues that are bothering you. Instead, focus on the facts and listen to their side of the story. Also, remember that they may need time to process your point of view.

- Support your opinions with logic and facts
- Give them space to process before confronting the issues.
- Avoid pushing them to settle the matter immediately.

APPENDIX: OVERVIEW OF THE DISC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



January 8, 2019

Hon. Mayor Milissa Holland
City of Palm Coast
160 Lake Avenue
Palm Coast, Florida 32164

Hon. Mayor Holland and City Councilmembers:

Every day, everything I do is telling a story about what I value. I desire the story my life tells to be a contributing member of a community that seeks to thrive.

Throughout my previous employment experience, I have consistently demonstrated exceptional public service, superior problem solving and sound municipal finance skills.

I have proven my ability to develop and execute complicated work plans, create environments where employees may thrive and organize and manage complex multilevel operations. I have consistently demonstrated my ability to develop strategic regional partnerships with state and local governments and private enterprise. I have endeavored to create legacy in public service, recognizing that the actions we take now affect future generations. I have exceptional experience in positioning our people and resources to best accomplish the tasks before us today, while also effectively preparing to meet the challenges of the future.

I can offer you:

Leadership: I not only desire to continually improve the leadership I provide to those around me but have enough sincerity and humility to be mentored by leaders at all levels of an organization and throughout the community. I believe in cultivating a passion for shared success and a desire to continually improve performance, always reaching toward accomplishing our most important goals.

Core Values: The Core Values of Honesty, Integrity, Respect, Courage, Openness, Diversity, and Balance are an integral part of my character. I believe my demonstrated commitment to these core values provide a foundation for success in my personal and professional life. During the opening day of the Congresswoman Jennifer Dunn Leadership Institute, David Gergen (advisor to Presidents Nixon, Ford, Regan and Clinton) told me a very personal story about a time with President Nixon in the Oval Office and the importance of finding and always keeping your moral compass, no matter the challenge or storm. I assure you I have my compass firmly grasped.

Proven Ability: You will find I am contagiously enthusiastic and willing to be challenged, developed and stretched to where and how I may best serve the Council, the community and city

staff. I believe in being active, engaged and cultivating the talent and experience of those around me knowing that there is no limit to what we may accomplish if we do not care who gets the credit.

I have always endeavored to create vibrant and sustained energy in government, while building trust through integrity and transparency. Moreover, I am proud to say that every community I have worked for will emphatically validate the improvement and success we have shared as a result of our partnership together.

I sincerely hope that we will have the opportunity to meet and discuss how my energy and proven track record of success can benefit the City of Palm Coast. As a native borne Floridian I long to come back home. My wife and I believe Palm Coast is the dynamic place we are looking for to become productive and engaged members of the community and continue to raise our children.

I am a creative and motivated individual who would not only give all my efforts to succeed for you, but to continually exceed your expectations. I look forward to hearing from you.

Very Truly Yours,



Matthew T. Morton, ICMA-CM, EMPA
www.linkedin.com/in/matthew-morton-icma

Matthew Thomas Morton, ICMA-CM, EMPA

pgceburg@gmail.com

Summary

It is not enough that public managers simply maintain the continuity of their organizations, or even that the organization become efficient in current tasks. To create public value, we must make our organizations adaptable to new purposes and new conditions. We must embrace innovation and the experimental while strengthening the public policies that guide municipal purpose and honor our community's history. I have over 22 years of diverse management experience with expertise in the following areas:

- Community Growth/Development
- Regional and Strategic Partnerships
- Municipal Finance
- Emergency Management
- Legislative Advocacy
- Financial Operations and Budgeting
- Accomplished Grant Writer
- Infrastructure Management
- Strategic Visioning
- Human Resources/EEOC/Loudermill

Relevant Local Government Experience

City Administrator, City of Duvall, WA

07/19/2015 to 08/11/2018

Duvall, located in King County is strategically situated on the busy Highway 203 corridor. Duvall serves as a residential and service hub for the high-tech industry in one of the fastest growing and most diverse areas in the United States.

Duties and Responsibilities as City Administrator:

- Implementation of council directed policy. Administration of day to day business of the city along with identification and resolution of long-range issues.
- Preparation and administration of capital and operations budgets.
- Interest based negotiation with public and private sector entities on a variety of issues including; economic development, community redevelopment and professional service contracts.
- Responsibility for the city's compliance with federal, state and county regulations, rules, policy and law.

Achievements:

- Evaluated, assessed, reorganized and rebuilt City Departments after 16 years without a City Administrator.
- Significantly strengthened Local and Regional Partnerships.

- Created a successful 5'0' Law Enforcement Proactive Community Engagement Program and dramatically increased PD engagement through social media.
- Recognized opportunity and created an over 40k annual recurring cost savings to the City by remodeling the city approach to liability and risk management.
- Completed and implemented a city-wide salary survey, compensation metric and FTE deployment analysis designed to retain exceptional employees.
- Modernized city operations including; updating and creating a management plan for city owned real estate, created a targeted investment program to reduce capital liability and city-wide maintenance and operations costs.
- Successfully designed and led a voted levy campaign to improve technology and complete a turfed sport field recreation complex.
- Provided context-sensitive problem solving leadership around community development/redevelopment growth pressures.

City Administrator, City of Cle Elum, WA

07/13/2010 to 07/15/2015

Asst. City Administrator, Community Development Director 01/01/2006 to 07/12/2010

Cle Elum is strategically situated on the busy Interstate 90 corridor. Cle Elum serves as the Upper Kittitas County regional provider for municipal water, wastewater and contracted police services to several neighboring communities and the Suncadia master planned resort and hotels.

Duties and Responsibilities as City Administrator:

- Chief executive officer of a local municipal government.
- Oversight responsibility for the following functions: regional police force, municipal fire department, airport management, roads, regional water and wastewater systems, parks, planning, zoning, municipal finance, general governmental services and personnel.
- Economic Development Visioning and Strategic Planning.
- Implementation of council directed policy. Administration of day to day business of the city along with identification and resolution of long range issues.
- Preparation and administration of capital and operations budget.
- Negotiation with public and private sector entities on a variety of issues ranging from economic development and interlocal agreements to professional service contracts.
- City representative for the Kittcom Regional 911 EMS executive management and oversight board.

Achievements:

- Conducted a regional water rate analysis and cost model to more appropriately distribute both fixed and variable costs fairly to all parties.
- Instituted development agreement mechanisms to create predictability for required capital expenditures and created revenue streams for anticipated capital equipment needs.
- Conducted Industrial System Optimization Studies to improve efficiency and realize utility cost savings at regional water and wastewater plants.
- Reduced operating budget by 9% while maintaining existing levels of service.
- Eliminated long term lease arrangement and procured a new regional police station facility through short term municipal bonds, resulting in a 40% savings on annualized facilities costs.

- Converted city water meter reading to remote radio read system thereby reducing labor costs, improving efficiency and streamlining the billing process.
- Championed staff morale initiatives to increase productivity and reduce labor costs.
- Successfully authored a variety of over thirty local, state and federal grant awards for public infrastructure, municipal airport improvements, parks, and economic development.
- Negotiated the siting and dedication of the Washington State Horse Park at Cle Elum, a regional equestrian facility, serving as the foundational component of the city's economic development strategy.

Senior Project Coordinator / Strategic Process Reengineering 12/10/2002 to 12/30/2005
Land Use and Environmental Project Coordinator 11/06/2001 to 12/09/2002

Yakima County is the second largest county in Washington State (population 243,231). I co-chaired the executive team responsible for improving customer service, increasing staff interactions, enhancing productivity, and reducing costs in the countywide development processing and permitting systems.

Duties and Responsibilities as Senior Project Coordinator:

- Served as chief change manager with extensive hands-on experience in managing comprehensive and complex system change, innovative business process re-engineering, strategic change management, permit streamlining, organizational analysis, and integration of new technologies to improve efficiency and reduce costs.
- Worked with the development community to create a new county customer service culture and redefine customer expectations.
- Special projects liaison to the Confederated Tribes and Bands of the Yakima Indian Nation.
- Project coordination and management of complex interdisciplinary land use and environmental actions.
- Represented the county on a variety of intra- and inter- governmental task forces and commissions.

Achievements:

- Dramatically improved interdepartmental communication and efficiency.
- Earned the trust of over 100 employees to be selected as their representative in collective bargaining negotiations.
- Tested and implemented cost saving technology improvements in the county permitting and development process.
- Ensured effective communication on behalf of the county permitting center team to community members, local leaders and regional stakeholders.
- Assisted with the feasibility and cost analysis of the Yakima County Regional Corrections Facility.

Additional Professional Experience

County Planner, Yakima County **10/09/2000 to 11/06/2001**

Served as a land use and environmental planner administering land use and zoning regulations, the Washington State Growth Management Act and processed land use and development applications.

Duties and Responsibilities as County Planner:

- Processing of a variety of land use, zoning and environmental permitting applications.
- Code enforcement compliance and inspection.
- FEMA compliance, floodplain management and permitting.

City Planner, City of Kent, WA **08/18/1999 to 10/08/2000**

The city of Kent is the third largest city in King County and the sixth largest in the State of Washington (population 92,411). During my tenure Kent served as the hub of the original “.com” revolution and was a focal point of break of bulk distribution and mega scale warehousing.

Duties, Responsibilities and Achievements as City Planner:

- Worked with Boeing Space Division for terrestrial satellite communications equipment siting.
- Served as the primary cellular and wireless communications tower permitting individual.
- Reviewed and permitted several first of their kind “.com” warehousing facilities.
- Developed and implemented the first web page for the City of Kent Planning Department.

County Planner, Grant County, WA **07/01/1998 to 08/19/1999**

Grant County was incorporated in 1909 and covers more than 2,971 square miles (population 89,120).

Duties and Responsibilities and Achievements as County Planner:

- Appointed by the Board of County Commissioners as the Grant County representative for the Hanford Nuclear Facility Reach 20-year Interim Action Plan under the United States Department of Energy, Secretary Bill Richardson.
- Principal Planner for the MCA Universal Gorge Amphitheater expansion, a key economic development project for Grant County.
- Principal Planner, county representative and chief liaison for the Genie Industries North American Manufacturing Operations relocation from King County to Grant County.

Education

Harvard University, John F. Kennedy School of Government, Cambridge MA, Founded 1636
HKS Program Senior Executive in State and Local Government, Completed 2017

University of South Dakota, Vermillion, SD, Founded 1862
Executive Master of Public Administration Awarded 2013

Walt Disney Institute, Anaheim, CA
Disney's Approach to Leadership Excellence and Performance Benchmarking, Completed 2011

Central Washington University, Ellensburg, WA, Founded 1892
Bachelor of Arts Geography Awarded 1998

Significant Honors and Awards

International City/County Managers Association 20-Year Service Award
2017 Awarded at 103rd International ICMA Conference, San Antonio, TX

2017 Washington State Governors Smart Communities Award
Kittitas County Tourism Infrastructure Plan

2016 Washington State Governors Smart Communities Smart Vision Award
Smart Vision Award Watershed Planning

2014 Parade Grand Marshall
Honored as the Pioneer Days Parade Grand Marshall for Service and Dedication to the Community

National Incident Management Team 2: Table Mountain Fire
Award of Recognition for Outstanding Support and Significant Contributions

2010 Newsmaker of the Year NKC Tribune
Honored as Newsmaker of the Year for the Vision Cle Elum Planning Effort

Professional Affiliations

Washington Cities Insurance Authority Executive Board Member
 International City/County Managers Association – ICMA Credentialed Manager
 Washington City/County Managers Association
 Government Finance Officers Association
 Washington Cities Insurance Authority
 Association of Washington Cities
 Economic Development Group of Kittitas County Executive Board Member, 2008-2010
 Congresswoman Jennifer Dunn Leadership Institute Executive Board Member, 2010-2011

Recent Highlighted Continuing Education/Professional Development

4DX The Four Disciplines of Execution For Strategic Organizational Change	2018
Harvard University & edX - CitesX: The Past, Present and Future of Urban Life	2018
FBI National Academy and Coach Pete Carrol Foundation Leadership Training	2017
WA City & County Managers Association Summer Conference	2017
AWC Annual Conference & Legislative Action Days	2017
FBI National Academy: Lessons Learned: Sandy Hook School Shooting	2016
ICMA International Conference (Attendee and Host Committee Volunteer)	2016
Leadership Eastside Executive Insights Program	2016
National Labor Relations Board NW Institute, NLRB	2015
Sustainable Management of Water and Waste Water Systems, WDOH	2015
Fiscal Sustainability Training: Bending the Cost Curve, AWC	2015
Human Resource Training and Compliance, EEOC & WCIA	2015
Completion of Executive Master of Public Administration	2013
Alliance for Innovation, Consolidation of Municipal Services Training	2013
Washington Cities Insurance Authority, Employment Law Institute	2012
Law Enforcement Oversight and Management Training, WCIA	2012

**City Manager Pre-Interview Questionnaire
City of Palm Coast, Florida
Due NLT Monday, February 4th at 11:00 PM CST**

Full Name (first, middle, last): Matthew Thomas Morton
Nicknames (if any): Matt

Please provide your cell, home, and office numbers to facilitate contacting you if needed.

Cell: _____

Home: _____

Office: N/A

Please answer each of the following questions completely and thoroughly.

- 1. How many employees, and what size budgets did you oversee in your last three positions?**

Position	Employees Overseen	Budget Overseen
Cle Elum Assistant City Administrator	Partial/indirect responsibility for oversight of 45 +/-	Partial/indirect responsibility for oversight of \$11 Million
Cle Elum City Administrator	45 +/-	\$11.7 Million
Duval City Administrator	50 +/-	\$43.4 Million

- 2. Please detail the specific departments you have supervised in your last three positions.**

I have supervised departments across full-service cities, including;

Administration, Administrative Services, Clerks Office, Municipal Court, Airport Manager, Public Works, Community Development, Parks, Economic Development, Police and Fire, Emergency Management and 911 Call Center, Water and Sewer Treatment, Information Technology, Stormwater, and Finance.

3. Please explain why you left your last three positions.

Position	Reason for Leaving
Cle Elum Assistant City Administrator	Promotion to City Administrator
Cle Elum City Administrator	After 10-years at the City, I moved to accept a great opportunity in a larger city.
Duvall City Administrator	Mutually agreed upon separation – Newly elected full-time mayor. There was no cause, no discipline and no adverse cause of action.

4. Are there any gaps in excess of two weeks in your employment history? If so, please explain in detail.

After the mutual separation became effective in August 2018, I have taken the past few months to search for an outstanding career opportunity and the right organizational fit. There are many jobs out there, but I am interested in a consummate legacy opportunity and I believe Palm Coast is just such an opportunity.

5. Please describe your experience and skills in strategic planning and visioning? How do you facilitate development of a clear vision for the organization and communicate that vision to all stakeholders?

Goals are the mechanical process that we believe are likely to be achieved. Vision represents the most fundamental values and beliefs of the community that require relentless consistency and our best efforts to deliver with excellence. Through it all, we have a responsibility to listen to understand, to build relationship and ask for feedback that we will use. The fastest way to lose public trust and credibility is to ask for feedback during a strategic planning/visioning process and then to dismiss it.

I have exceptional experience and skills in strategic planning and visioning. I have won recognition as the “News Maker of the Year” in a regional newspaper for designing, organizing, leading and connecting the community and larger County region through a successful strategic planning and visioning effort known as Vision Cle Elum.

I was fortunate enough to be approached by a mentor early in my career in Cle Elum, WA who had involvement on the executive level with General Electric, Alaska Airlines, and Trendwest corporations. This mentor had been taught by the famous Mike Vance of the Walt Disney Company. Mr. Vance is credited with adapting storyboarding out of the movie studio and into the business practice and strategic planning and operations realm.

After being taught and coached for several years on the intricacies and value of storyboarding, I have adopted the storyboarding concept as a regular practice. I have used the storyboarding process in almost every facet of strategic planning and development. At its heart, storyboarding creates an engaging, iterative and complete process where every stakeholder can be heard, a diversity of ideas and opportunities can be thoroughly

evaluated and prioritized, and a clear and actionable vision can be not only communicated but embraced by stakeholders.

Storyboarding is communicative and visually engaging. As human beings, we are wired for story. Storyboarding helps distill ideas, themes and the technocracy of government activity into a tangible and accessible tool for communication, building legitimacy, communicating with clarity and providing an opportunity for the various viewpoints and the voices of dissent to be heard, acknowledged and addressed.

More importantly than the strategic plan or vision itself is the capacity to be committed to its execution. Too many great plans sit on a shelf as merely bookends collecting dust and reminding us of lost opportunity.

6. What do you feel are your greatest strengths as a leader and manager?

As a leader I believe my greatest strengths are;

1. Consistency: I operate with openness, clarity, and consistency; always providing a steady hand at the wheel.
2. Creativity and vision: I am a creative and visionary big picture thinker willing to innovate practices, incorporate institutional knowledge that works, and fearless to jettison broken elements of dysfunctional institutionalism.
3. Highly developed leadership practice: I expect leadership contributions from every member of the organization. Moreover, my leadership practice is based off a natural curiosity for just about everything. I recognize the value in humility, servanthood, truth and never criticizing, condemning or complaining. I proactively choose to use the good, true and beautiful in every situation as the foundation of transformative success and the fuel for moving forward.

As a manager I believe my greatest strengths are;

1. Developing the talent, experience, and commitment of those around me. I believe in empowering, coaching and supporting staff to operate more wisely and more courageously toward the accomplishment of the greater good. I desire for people to break out of the endless tactical loops of poor management that only seek to triage our self-created emergencies.
2. Cadence of accountability. I believe in establishing a cadence of accountability that is not punitive in nature. This is accountability based off every staff member knowing the "score", knowing where they fit on the team, and knowing their role is essential toward realizing greater organizational success. Employees want to thrive. By challenging, engaging and addressing the "whole person" with organizational and personal goals, we can create an environment where employees may thrive, and Palm Coast becomes the premier choice for employment.
3. Pushing down/delegating to the 'lowest possible level'. Nothing I have accomplished has been done alone. We must move away from the independence mentality (the I can do that all by myself), past the dependence mentality (the I

can do that if you/they first do that for me) to a culture of true interdependence; where the sum of our knowledge, experience and will support the collective ideal of success that allows everyone to share in accomplishment. This paradigm recognizes that attitude and effort are replicable and should be the first focus as outcomes are not replicable. I treat failure as an opportunity to learn and improve, never looking for the nearest source of blame. This interdependent mindset allows strategic vision and mission to animate the mind and illuminate the heart toward meaningful action that realizes the highest levels of public value.

7. What is the most complex project you have coordinated? Describe the steps you took to ensure political, organizational, and community support for the initiative, highlighting specific challenges you faced, and how you overcame them to successfully implement the project.

The most complex project I have coordinated was the Washington State Horse Park in Cle Elum, Washington. The project involved two Gubernatorial Administrations, State Legislators, Native American Tribes, County Commissioners, Private Enterprise, Environmental Regulators at the State and Federal Level, constituencies composed of former U.S. Olympians and individual citizens and citizen groups both in support of and vehemently opposed to the project.

The Washington State Horse Park Project was a landmark, albeit conceptual project, that was less than 48-hours from the original agreements expiring and the project failing.

I used the first 24-hours to take in the entirety of the project documents in an 'emergency briefing room' to attempt to rediscover the energy, the hopes and the vision behind the project. I remember staying up all night, pouring through documents, graphics, and letters. I reframed sticking points toward positive outcomes and separated positions and values away from people and personalities.

Bright and early the next morning I made urgent phone calls to the key project stakeholders, reminding them of their contribution and passion for the project and asked them to suspend their disbelief and agree to an emergency meeting. From that meeting, I was able to get the key stakeholders to simply extend the agreements for 90-days while as a group we could rediscover why this project was so important and evaluate the desire to recommit to the project and move forward.

This process was visionary from its inception. However, while general support existed for the project, that support generally contained conditions or demands that would mutually exclude some or all of the interests of other key stakeholders. This clearly would lead to impasse and project failure.

I led storyboard sessions for the project. Found ways to invent options for mutual gain that would result in an 'enlarged pie' and a true paradigm of mutually beneficial negotiation rather than the typical distribution of loss, as is the case with so many discussions erroneously mislabeled 'negotiations'. I used my skills and experience in

conflict resolution and negotiation to uncover the positions and desired outcomes; encouraging all to resist focusing on personalities and problems. I led community and stakeholder meetings where we first sought to understand the community and stakeholders' concerns before we sought to be understood. I was able to clearly and tangibly illustrate that project failure resulted in a complete loss for everyone involved.

This process led to the siting of the Washington State Horse Park in Cle Elum, a 112 Acre equestrian event facility with dozens of miles of connected trails, that is a regional and international destination. The Horse Park serves as a key economic lynchpin to the Upper Kittitas County Economy. Ancillary to the Horse Park project, it cleared the way for the reimagining the City Bullfrog Urban Growth Area that will be the home to 90-acres of mixed light industrial and commercial and some 1,100 residential units.

8. Please describe your experience in overseeing the following operations: Water Treatment & Distribution, Wastewater Collection & Treatment, Municipal Stormwater, Street & Traffic Control, and Public Safety (Police & Fire).

Water Treatment and Distribution: I have overseen a full municipal water treatment plant and distribution system, designed for 8-MGD and serving multiple cities and a master planned resort development. This system operated on multiple pressure zones with coordinated telemetry through SCADA. The system utilized several water sources including direct riverine diversion and groundwater wells in hydrologic continuity with an adjacent waterway. The system was capable of delivering non-treated (raw water) for irrigation to our resort development and two golf courses. I was directly involved in water rights procurement and expansion sourcing design with FEMA and the U.S. Army Corps of Engineers. I have helped bid and oversee improvements to water treatment capacity and storage reservoirs. On the distribution side, I have overseen water meter upgrade and radio read meter conversions, replacement of water service mains and lines, including new replacement and slip lining existing lines and hydrant upgrades. Along the administrative side I have conducted and overseen rate analysis studies, cost allocation studies, cost reduction studies, efficiency audits, and long-term capital facilities planning. I have been involved with Water Comprehensive Plans and Annual Water Quality Reporting.

Wastewater Collection & Treatment: I have overseen the operation of two regional wastewater treatment plants. Both were similar band/influent screen aeration treatment, with the separation and disposal of bio-solids with post selective Spectrum U.V. Treatment and/or contact chlorination. The City of Duvall plant utilizes a biomembrane reactor (MBR) for primary treatment. Wastewater collection operations overseen include sewer lines, lift stations and collection points. I have also been involved with NPDES Discharge renewals and testing compliance.

Municipal Stormwater: I have overseen both NPDES Phase I and Phase II communities' comprehensive approach toward stormwater collection, storage, treatment and

discharge and the general operation of municipal stormwater utilities and Capital M&O and facilities planning.

Street and Traffic Control: I have worked with PW Directors, City Engineers and consultants to conduct and oversee TIP's, traffic studies, apply for state and federal transportation infrastructure grants, and financing TIP and street improvements via Transportation Benefit District and Fuel Tax mechanisms. I have worked directly on roadway safety components and secured grants for Safe Routes to Schools and Main Street traffic and parking redevelopment.

Public Safety (Police and Fire):

Police: I have overseen two municipal police departments; working toward compliance with 21st Century Policing, Police operating procedures conversion to LEXIPOL and accreditation. My police department oversight includes organizational restructure, jail siting and negotiation and a data-driven LOS study with the ICMA Center for Public Safety Management. I have also overseen and been directly responsible for the Public Safety Communication and Social Media Strategy. I have overseen fleet conversion, capital building acquisition and security upgrades.

Fire: I have overseen a combination paid staff and volunteer Fire Departments. I have overseen technology redeployment, grants for engine and bunker gear acquisition, and regional EMS operation agreements with Hospital Districts for ALS and BLS transports. I have overseen capital facilities acquisition and drafting new personnel policies.

9. Please describe your experience and skills in municipal financial management, budget development, and capital infrastructure planning, maintenance, and financing. In your response, please highlight any related creative financing strategies you have used to address CIP infrastructure shortfalls.

I have experience in full-service city budgets, inter-fund loans, issuance of bonds and both councilmanic and market rate LTGO indebtedness. Using the storyboarding process, I discussed earlier, I illustrate budgets over multi-year arcs connecting trends, tracking accomplishments and uncovering opportunities hiding in plain sight. I have refinanced municipal debt, ensured investments were maturity laddered and generating the best rates of return for the taxpayers. I am fiscally conservative, believing that debt we incur today must be essential because it restricts future opportunities.

I have broad experience in assessing and planning for the costs of maintenance and operations, capital infrastructure, CIP's, and finding creative ways to reduce fixed and variable costs while leveraging existing assets to create M&O and CIP revenue streams.

Two recent examples of this are; first, leasing space on City 'big belly solar compactors' for the defeasement of event and festival solid waste collection costs.

Second, identifying synergistic ways to create revenue streams from underutilized city staffing, physical and capital assets. For example, creating and marketing shared telecom lease locations or renting city equipment, such as vector trucks that have

regular, planned periods of downtime that can be leveraged to create replacement equipment revenue.

10. Please describe any experience you may have in assisting your community/organization in advancing voter-referendums to consider financing of proposed municipal capital projects and/or community initiatives? In your response, also indicate the results of any such referendums, including any lessons learned that you would apply in future referendums.

Most communities I have worked in have been fiscally conservative and tax averse. Consequently, I have designed and led only two voter referendums, both of which were successful. The key to a successful levy isn't in getting the number of votes needed to pass, it is telling a clear, concise and transparent story and showing proactive gratitude for the life of the collection of the levy/referendum.

1. A successful voted indebtedness excess levy for capital acquisition and operations of the Municipal Fire Department.
2. A successful voted excess levy for Police and Public Safety, Technology and Turfed Sports Complex.

The levy initiatives taught me essentials to long term success I will employ again.

1. Begin with the end in mind. Take the time to research similar referendums in other communities. What were the successes and failures? Do we have a crystal-clear blueprint of our vision?
2. Begin by expressing the need of the City/community in terms of social, civic, safety, etc. Resist the urge to 'jump out of the gate' with a predesigned campaign, dollar amount and plan you might have to backtrack on later. Offer to have a conversation on needs and resist yelling fire and having fire extinguishers for sale.
3. Listen to the public. Ask for alternatives and do the hard work of evaluating their alternatives and proposing those as a backup plan should the community decide to not desire a levy/referendum vote or if the levy/referendum fails. If we believe in the need before asking the voters for money, we will do our best to attend to the need if they reject the allocation of additional tax dollars. Plan in full transparency and let our citizens decide.
4. Seek to build coalitions of supporters that can tell the story better than local government. Also, we have a responsibility to the critics, listen to them as well. Value their objections.
5. If the levy referendum fails, show how we continue to try to accomplish the goal/solve the problem/etc.
6. If the levy/referendum passes continually thank the community and create 'blue ribbon' reminders of their money at work. Celebrate completion milestones. We printed banners at project sites, and placed graphics on City Police Vehicles that stated, "Delivering on our promises". Earning and maintaining the trust of our community is far more valuable than winning or losing the dollars.

11. Please describe your experience with collective bargaining and labor relations, highlighting the types of bargaining groups you have worked with and tell us about any particularly innovative provisions/programs you may have incorporated in previous collective bargaining agreements?

I have broad experience in collective bargaining and labor relations. I have trained with the National Labor Relations Institute and have extensively studied and put into practice trusted practices of principled negotiation taught by Harvard's William Ury in the three books; *Getting to Yes*, *Principled Negotiation* and *The Power of a Positive No*.

I have found that often collective bargaining and labor relations are destined to fail for several reasons. First, city officials often fail to build relationships and hold regular and routine meetings with individuals, labor groups and labor representatives. You cannot see each other once every 2 or 4 years and expect to begin negotiations in earnest with trust and colloquialism. Relationship is the foundation. If an organization is constantly appreciating, respecting and encouraging employees, consistent communication will act as the bedrock for that trust.

Moreover, negotiators typically never negotiate, they only distribute loss and think they have negotiated. This leaves everyone frustrated and results in poor deals and festering regrets. True negotiations can only happen when you have trust, listen to understand before talking to be understood, taking the time to accurately understand the positions and needs/wants behind those positions and uncover creative ways to enlarge the pie by bringing multiple issues and resolutions forward. Issues and concerns must be constantly reframed toward the positive. A true *Pareto Efficient* negotiation leaves no opportunity untouched and successfully addresses all available options for mutual gain. This is when negotiations and labor relations move past transactional moments to transformational opportunities.

An example of this came with a recent Teamster Negotiation (the city's largest bargaining unit). The group wanted significantly high COLA adjustments over the life of a multi-year agreement. I took the time to truly listen and get to the heart of their position. It turns out there was great fear that if they did not get COLA's into the salary schedule while the tech economy was red hot, the City would do as it had done in years past and balk at future COLA's while the economy was bad.

I reframed their position (of fear) to clearly express that they desired "predictability in the stability of salary increases" to which they agreed was their primary concern. I then framed the City concern of economic volatility and our need for consistency and predictability that matched inflation and ad valorem tax collection rates. The results of a 5, 10 and 20 year CPI analysis I conducted determined the CPI grew at an average rate of 2% per annum.

The innovative solution proposed was a new cola formula that used a 10-year rolling average of CPI. This guaranteed the Teamsters COLA increases that were regular and that would never be "0", clearly meeting the need behind their position. This also met the cities need for stability and predictability that matched revenues and insulated the city against the volatility of CPI spikes in our booming economy.

12. Please describe your philosophy and approach to building a strong team environment and motivating your employees to perform at their highest levels.

Ronald Regan got it right when he said: "There is no limit to what we can accomplish if we do not care who gets the credit". Teams need to be more than strong. Teams need to be transformational. Teams need to be fully engaged with trust, truthfulness, courage, and transparency that extends past the independent and dependent paradigms into a true mode of interdependence- that produces everyone's best mentality, best creativity, best loyalty and best maturity. This is what builds a high-performance culture that creates significant public value.

There are only three things that a person can train; body, mind and your discipline/craft. In that paradigm mindset drives behavior and behavior drives performance. I believe transformational teams have clarity, they see their effort is commiserate with their success, they train and are confident and prepared, they are supported with courageous acts of leadership that value effort as a valid indicator of success. Transformational teams recognize failure as an authentic way by which we learn and are prepared to move forward from failure striving to hold each other up toward the accomplishment of the greater good and the realization our most important strategic goals and objectives.

I focus as much on performance as I do on outcomes. This is because attitude and energy are replicable...specific outcomes are not. High performing teams know and practice the crucial difference between reacting (seldom good) and thoughtfully responding with the most important objectives in mind (always beneficial).

We are all familiar with and train our professional areas of expertise and professional certifications. I ask my teams to work with me to train the mindset skills of calm, confidence, focus and trust. These are all mindset skills used by the most successful coaches worldwide to build epic transformational teams.

13. How do you facilitate open and transparent communication with the Mayor & City Council, staff, residents, and other stakeholders?

The key to open and transparent communication is relationship. I have witnessed Mayors, Councils and Staff being open, transparent and honest yet heckled liars because there is no relationship or trust with those whom we seek to communicate with.

Open and transparent communication is a perpetual activity, it is a constant component to what we do. To that end, I have employed a wide array of techniques and mediums. I make it a routine to touch base with Mayors and Councilmembers at least weekly. I believe in regular open retreats to focus on communication and information sharing. I

perpetually engage stakeholders with regular and recurrent meetings. I host “Coffee with the Manager” and other gatherings to become truly accessible. Equally as important is meeting people on their turf. Seeking to be invited to HOA and community meetings to simply ‘listen’. I seek out voices of dissent and recognize we have as much a responsibility to listen and consider the voices of those that disagree with us as those that do.

I strive to ensure that everyone has access to the same good and consistent information that creates the context for local government activities by illustrating the extent to which local government services and policies are fulfilling expectations or where we are falling short. I strive to always be approachable and accessible. As Gandhi noted “People are the purpose of our work...not a distraction to it”. This philosophy is the existential starting point for all my communications.

- 14. Palm Coast desires to be recognized as a community that encourages development consistent with its evolving vision from a largely residential planned community to a more diverse, mixed-use, residential, commercial, high-tech, and high-skill business center to diversify the City’s tax base. Please tell us about any innovative strategies that you have used in your current or previous posts that successfully resulted in increased economic development, including providing some notable examples.**

In Cle Elum, Washington I employed several creative strategies to encourage development consistent with the City Vision; this included pre-permitting land uses consistent with the City economic objectives as a means of demonstrating feasibility and intent. Another approach was to identify key industry sectors, such as high-tech, light manufacturing and fabrication, that could be sited with an incremental approach toward traditional infrastructure. This led to the innovative Swiftwater Business Park that became home to high-tech machining operations for Trek-Bicycles, Ping Golf, Boeing Aerospace and other airlines parts suppliers.

The keys to this success were having a clear and concise vision with concrete actionable steps that were both attractive, timely and of particular responsiveness to industry trends for the various markets we sought to attract.

- 15. Please tell us about any notable intergovernmental partnership(s) you have developed or played a significant part in their implementation. As part of your answer, highlight any significant challenges that you had to overcome to help make the partnership(s) successful.**

I had a significant stake in developing with County Commissioners, Central Washington State University, three City Councils, and multiple chambers of commerce the regional merger of 4 fractured chambers of commerce. This was difficult because of actual job losses and the perception of the loss of organizational identity. In the end, we were able to demonstrate greater efficiency, greater accomplishment and a focused regional branding that allowed identify to remain a fundamental component of a more organized

and productive chamber organization with the collective resources to accomplish strategic goals that had been languishing for years.

Kitcomm 911 Regional Emergency Management and Equity Reconciliation – I served on an executive board of countywide leaders to develop how operational and CIP costs would be allocated among member agencies. This was needed to ensure quality operations of a regional EMS 911 Center, and to allow for required 21st-century upgrades to Spillman, E-911 services and call logs charges. The result ensured that transactional costs would not continue to be a deterrent to police officers properly conducting their jobs and that the center was financially secure moving forward.

16. What steps and/or processes have you used to track the performance of your organizations? Please include any specific examples involving performance metrics, and how you have communicated organizational efficiencies to the public and/or employees.

I have used both performance metrics and goal setting along the personal, professional, team and organizational dimensions. Performance measurements are effective if we clearly connect what we are measuring and why we are measuring it. We can then effectively communicate that story, so everyone knows it has created desired or meaningful public value.

Along the strategic goal dimension, I employ the simple but incredibly effective goal setting formula of “x” to “y” by when. I believe the greatest government mobilization and period of effectiveness outside of wartime was when J.F.K. used this goal setting formula in the form of “x” a man, “y” to the moon”, by (when) the end of the decade. This simple clarity of the most important strategic goals and vision create a laser focus on delivering, with excellence, the defined steps toward accomplishment while allowing the organization to remain nimble enough to continue to leverage success toward accomplishment rather than remain recalcitrant in irreverent fixed paradigms.

This performance measurement paradigm involves;

1. Focus on the wildly important goals.
2. Focus on lead measures that are leverageable and actionable.
3. Keep a scorecard so people want to “play” and know what needs to be done to win.
4. Create a cadence/rhythm of accountability that weekly assesses small steps toward the big goals.

17. Palm Coast currently operates FiberNet, a municipal high-speed fiber-optic backbone that connects City sites and facilities. The City’s economic development goals include the attraction of dynamic, high-paying technology jobs, bolstered by the enhancement of its fiber network, ideally with the assistance of a new public-private partnership (P3)

to help leverage its assets. Please tell us about any municipal fiber experience you may have, as well as any P3 projects you or your organization(s) may have been involved with, highlighting your particular contributions to the development and/or maintenance of such partnerships.

I have worked on the periphery of a municipal regional fiber-optic network project as it related to the utilization of State and County owned or leveraged fiber optic backbone and dedicated strands.

In the technology-heavy region of Seattle, the conversation is shifting to the deployment of 5g and faster wireless technologies. These technologies, albeit having their own limitations, are easier and faster to deploy, require less risk and expense of infrastructure in the ground, allow for more rapid and organic deployment and do not involve the deep capitalization into fixed assets.

Consequently, our conversations have relegated our fiber corridors as lease opportunities to operators who are capitalized enough to operate, maintain and add redundancy to looped fiber backbone or toward specific employment centers (such as Microsoft) who demand Dark Fiber access.

Moreover, and of key importance, revenue can be generated in the form of utility taxes and communication assistance from telecom, while broadband and internet remain largely unassailable to regulation, customer service standards and cost sharing aside from franchise fee establishment.

18. When we conduct a comprehensive background investigation and reference checks, what will we find that may warrant explanation or that could be of concern to the City of Palm Coast?

I did have had two unfortunate medical crises in my life. First, when I was in college and did not have any medical coverage I was bitten by a dog and developed a paracardial infection. This led to an arrhythmia and t-wave abnormality. At the conclusion of that medical process I was advised to file for Chapter7 Bankruptcy. This was bad advice as my medical bills at the time amounted to only a few thousand dollars, but that seemed insurmountable to a very young person.

Second, I was diagnosed with Hodgkin's Lymphoma. I underwent two years of Chemotherapy and a full analogous stem cell transplant. We filed Chapter 13 Bankruptcy as the stem cell transplant medical bill were enormous and the bills still in process were significant. We did everything we could to avoid bankruptcy but did not have enough financial resources. We completed the required 5-year payment plan in 2018.

I will pass the five-year cancer free date on February 14, and am no longer in remission but considered cured.

Aside from those two events, we have solid credit; good savings and have always lived responsibly and within our means.

19. What will we find in an internet search of press coverage that may be controversial or of concern to the City of Palm Coast? Please provide whatever explanation you think is appropriate to help us understand what we will find.

I am not aware of any significant controversy. I believe articles you will find explain themselves and/or are just typical press City Managers/Administrators receive.

20. Are you currently involved in any other searches and what is your status in those searches?

A: I am currently involved in five other searches. I am a semi-finalist in one-search and the remaining four searches are set to close the initial application period within the next few weeks.

21. Please provide a full description of your current compensation and benefits package and your desired compensation and benefits package if you were selected for this position.

A: My most recent compensation package included;

- a. Salary \$143,000.
- b. A severance package of six-month salary and healthcare premiums.
- c. State Public Employees Retirement System premiums.
- d. Comprehensive medical, dental and vision insurance for myself, spouse and dependents. A 25% premium cost share applied to medical insurance only.
- e. Monthly vehicle allowance in the amount of \$350.00.
- f. Monthly social media stipend for 'duties outside of normal, customary and exempted' activities in the amount of \$550.00 per month.
- g. 96 hours of executive leave granted annually (no cash value and unused leave expired December 31 of each year).
- h. Accrual of annual leave commiserate with other senior staff.
- i. Accrual of sick leave at approximately 8-hours per month.

b. Desired compensation

- a. Salary of \$150,000.
- b. Medical, Dental, Vison Insurance premiums for myself and dependents.
- c. Accrual of annual leave and sick leave commiserate with similar employees.
- d. Retirement program contributions in Florida State Retirement (FRS) or similar.

- e. Vehicle allowance of \$500 per month or use of City Fleet Vehicle for business related travel.
- f. Severance for at will separation/termination.

22. If you were selected and offered an acceptable compensation package, what concerns or hesitations do you have that would have to be resolved before you would be ready to accept the position as the next Palm Coast City Manager?

I would like to know that the candidate selected has the support of the Mayor, City Council and Senior Staff.

23. What are the three most important questions you have for Palm Coast Mayor & City Council?

1. What do you view as the biggest challenges and opportunities for the new City Manager?
2. What do you view as the foundation of a successful relationship between City Manager and Mayor/Council and Community?
3. What are the most important strategic items you want accomplished in the next 1, 5- and 10-year horizons?

Matthew T. Morton ICMA-CM, EMPA

City of Palm Coast Florida – First Year Action Plan

Overview: I have a great personal desire to hit the ground running and to begin establishing credibility as your new City Manager. Because earning that credibility can only start when the hyperbole ends and proactive action begins, I intend to do the following;

1. Developing a new culture – Among the most crucial of activities is the wiliness to bring the objectivity and clarity that comes with a new perspective. I want to deeply understand what works in the organization and what does not. I will work to develop and emphasize shared organizational values that link history, organizational legacy and community preferences to create new cultural and structural alignments. These new alignments are underpinned by uncompromising adherence to community values and through developing excellence of character in all staff. This new alignment reassures employees that they are valued and have a crucial role in actively creating our preferred future. Furthermore, it reassures the community that we are listening and working toward the objectives they desire.
2. Assessing organizational capabilities and uncovering gaps- I intend to understand the past, while effectively challenging the status quo. There is always skepticism and resistance to change. This is ameliorated by developing meaningful relationships and courageously protecting acts of leadership across the city. It is vital that the new manager spend as much time with as many people as possible. It is just as vital to avoid taking ‘word of mouth’ shortcuts. I will conduct a full comprehensive assessment of the organization and get to know people; valuing their diversity and meeting them where they are at. As I’ve noted before, people are the purpose of our work and not a distraction to it.
3. Establishing communication and trust- First impressions are meaningful and impactful. Listening not to respond, but to truly understand is key. I will endeavor to proactively communicate across the city and with stakeholders. Creating opportunities to ‘add-mutual value’ to every communication shows that I am a serious team player who is committed to the success of others above myself. I will communicate not only through established organizational channels but look for ways and opportunities to deepen the nature, venue and create new methods for communication and accessibility. I will not only communicate with our fans, but also with our critics and attempt to assess the concerns and values behind positions.
4. Empowering staff to be high performing and transformative- I will build and empower staff based off a strategic approach, that when successfully articulated, drives engagement and propels us to work together as a cohesive and synergistic unit. I will develop a sense of urgency around building the vital systems and processes that sustain success and develop excellence of character. I will strive to build a resilient and transformative leadership team.
5. Discovering stakeholder alignment- Community stakeholders are broad and diverse; internal and external alike. I will contact existing stakeholders, find new stakeholders and attempt to energize them by discovering mutually beneficial solutions that drive a culture of respect, engagement, shared accomplishment and a new hope for our future together.
6. Hero Story- Throughout this interview process (as is customary) I have regaled and attempted to impress you with my education, experience and accomplishments...you have heard my ‘hero story’. I want to be clear, I am a normal human being who hasn’t saved the world nor can I leap tall buildings in a single bound. ‘My’ success is the fruit of many dynamic relationships with

active, engaged and inquisitive Mayors, Councilmembers, Staff, Stakeholders and Community Members. My success has come from an unequivocal commitment to the success of others and placing the greater good ahead of my own interests. There is much I do not know and much I am not an expert in. However, I promise you will always have in me a true partner who is humble, approachable, curious, motivated, kind, trustworthy and moldable. I not only want to teach what I know and share my knowledge and expertise, but to be taught, to learn and to listen as we move forward with kindness, grace and compassion for each other. I want to be part of an organization that shares an unwavering commitment to accomplishing the greatest good for the City of Palm Coast. Let's commit to helping each other, learning together to stand on our own feet without standing on each other's toes.

Please consider the following as a high-level overview, with steps that build upon each other.

Before Day 1 – Theme “Preparation is Key”

Learning Goals:

- Dialogue with Mayor and Councilmembers with humble inquiry.
- Begin the process of learning by reading the city codes, policy, plans and documents, meeting minutes and similar materials.
- Read Florida Statutes and Codes.
- Seek to understand major political decisions, status of community relationships, sticking points and areas of opportunity.

Performance Goals:

- Seek to jump-start key staff and community relationships by learning community history and inviting open ended conversations.

Initiative Goals:

- Arrive in Palm Coast with confidence to begin creating public value and serving the community in earnest.
- Join FCCMA and connect with mentors and resources.

Personal Goals:

- Secure housing, and minimize personal transitional distractions to prepare for success on arrival in Palm Coast.
- Connect myself and family with local institutions; school, dentist, medical care, church, etc.

First 30 Days – Theme “Be a Sponge”

Learning Goals:

- Conduct candid discussions and learning sessions on my ‘before-day-zero’ learning results.
- Connect documents, themes and organizational vision with individual’s experiential relevance and on the ground intelligence.

- Meet with Council for a 'Transition' retreat and communication style exercise.
- Meet with Staff for a 'Transition' retreat and communication style exercise.
- Spend a day or two in each department and/or facility. Speak with as many staff as possible; where practicable ride a long, accompany/visit staff in the field or in the act of doing their jobs.

Performance Goals:

- Create with Mayor-Council a communication scope, authority and policy framework to create a predictable and agreed upon "Council-Manager" relations practice that satisfies Mayor and Councils needs and enhances the Council-Manager relationship.
- Establish Council-Manager clarity of roles document.
- Meet with Mayor and Council to hear feedback, history, concerns, priorities, etc.

Initiative Goals:

- Contextually review the Palm Coast Strategic Plan; evaluate its actualization 'on the ground'.
- Meet and begin relationship development with community leaders, groups, clubs and organizations.
- Set recurring and consistent communication points/meetings/broadcasts for Mayor, Council and Staff.
- Reach out to County Commissioners, Federal and State Legislators with an introduction and invitation for humble inquiry.

Personal Goals:

- Introduce myself to the community in person.
- Significant on the ground reconnaissance of Palm Coast to understand the nuance of community complexity and placemaking traditions.
- Attend community events, festivals, meetings and similar for introductions and integration.

First 60 Days – Theme "Be a Contributor"

Learning Goals:

- Understand and assess professional development and training routines, regimens and goals.
- Understand and assess departmental budget techniques, practices, history, needs, etc.

Performance Goals:

- Refine my 1st year plan by soliciting candid feedback and taking direction from Mayor and Council Members.
- Ask Senior Staff to begin preparing a condition/strength/gap analysis at the department operational level.
- Provide a 60-day Balcony Level Assessment to Mayor/Council.

Initiative Goals:

- Prepare myself and staff for the practice of Adaptive Leadership and ‘Getting to the Balcony’.
- Keep refining open, transparent and trust building communications.

Personal Goals:

- Seek community leadership, speaking and ‘engagement’ opportunities.
- Identify and join organizations, clubs, groups where I can contribute as an active community member.

First 90 Days – Theme “Transition to Leader”

Learning Goals:

- Develop a working knowledge of Strategic Plan accomplishments.
- Develop a working knowledge of legislative issues and concerns.

Performance Goals:

- Work with the organization to refine approach to team learning, organizational development, training, succession planning and work force development.
- Connect Strategic Plan with past/present accomplishments. Uncover/evaluate areas of “locked-investment/trajectory” and areas of opportunity.

Initiative Goals:

- Work with Mayor-Council and Staff to create and implement a ‘whole city’ responsiveness and integration plan. We all have shared responsibility to cultivate community, demonstrate responsiveness and engage in creating public value through action/interaction.
- Create a cultural foundation that seeks to proactively respond with our end goals in mind, and never to ‘react’. Learn and implement CORE service practices to Mayor/Council.

Personal Goals:

- Seek community leadership, speaking and ‘engagement’ opportunities.

First 180 Days – Theme “Active Leader”

Learning Goals:

- Have the basics of city-wide day to day operations understood and mastered.
- Have developed strong relationships and communication styles with Mayor, Council, Staff and Community.

Performance Goals:

- Mastery of past budget trends, decisions and future trajectory.

- Understand the procedural/regulatory nexus as it relates to Palm Coast (Federal, State, County, Regional, etc).
- Have a respected voice with key stakeholders at the Federal, State, Regional and Local Level.

Initiative Goals:

- Have identified a problem(s) and used a team approach to deliver solutions preferred by Mayor, Council and Community.
- Begin refinement of Strategic Plan through Strategic Triangle Framework and Storyboarding Practice.
- Instill leadership excellence training as a city-wide exercise that we work on together as a 'center' to moving ahead with excellence of character and single-minded determination.
- Receive critical feedback from the Mayor, Council, Staff and Community on areas for City Manager improvement.

Personal Goals:

- Look for leadership and service opportunities to serve the community, county and/or state as a citizen partner.
- Enhance my legitimacy through servanthood.

Remaining 6 Months – Theme “Servant Leader / Contributor”

Learning Goals:

- Continual and constant learning and development practice.
- Firmly established training, development and succession plans and practices in place.

Performance Goals:

- Active refinement of city strategic vision, goals, objectives and performance measures through storyboarding practice.
- Provide clear and concise 1st year staff evaluations, professional development and personal growth plans.
- Present results of a strategic gap analysis.

Initiative Goals:

- Receive critical feedback from the Mayor, Council, Staff and Community on areas for City Manager improvement.

Personal Goals:

- Be thought of as a trusted community partner, servant leader and resident of Palm Coast.
- Have a record of accomplishment because of a commitment to shared success and mutual gain.

MANAGEMENT PROFILE



Matthew Morton

Thursday, February 21, 2019

This report is provided by:

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WILEY

INTRODUCTION TO DISC®

Welcome to Everything DiSC®

Matthew, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on building relationships and getting people involved.

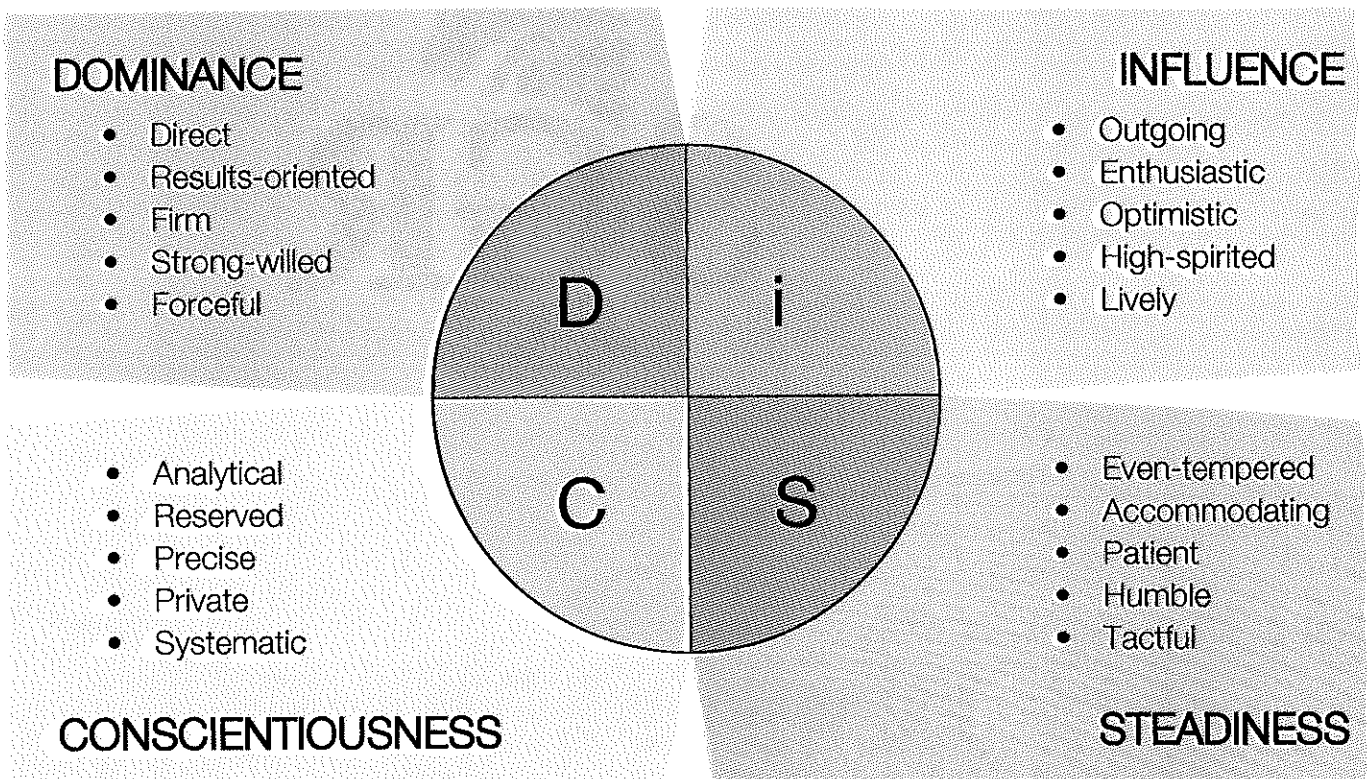
Or, maybe you're more comfortable working with those who take a light-hearted approach than those who want to analyze every step.

Or, perhaps you relate best to people who are more warm than skeptical.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

- ▶ All DiSC styles are **equally valuable**, and people with all styles can be effective managers.
- ▶ Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- ▶ **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- ▶ Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- ▶ You can improve the quality of your management experience by using DiSC to build more **effective relationships**.



YOUR DiSC[®] OVERVIEW

How is this report personalized to you, Matthew?

In order to get the most out of your *Everything DiSC Management[®] Profile*, you'll need to understand your personal map.

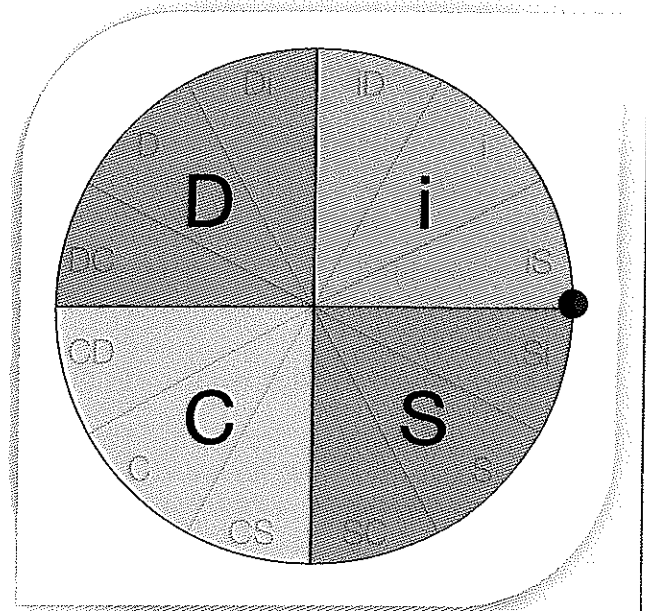
Your Dot

As you saw on the previous page, the Everything DiSC[®] model is made up of four basic styles: D, i, S, and C. Each style is divided into three regions. The picture to the right illustrates the 12 different regions where a person's dot might be located.

Your DiSC[®] Style: iS

Your dot location indicates your DiSC style. Because your dot is located in the i region but is also near the line that borders the S region, you have an iS style.

Keep in mind that everyone is a blend of all four styles, but most people tend strongly toward one or two styles. Whether your dot is in the center of one style or in a region that borders two, **no dot location is better than another**. All DiSC[®] styles are equal and valuable in their own ways.



Close to the Edge or Close to the Center?

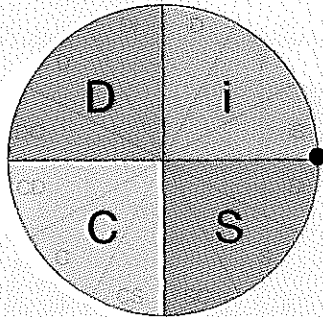
A dot's **distance from the edge** of the circle shows how naturally inclined a person is to encompass the characteristics of his or her DiSC style. A dot positioned toward the edge of the circle indicates a strong inclination toward the characteristics of the style. A dot located between the edge and the center of the circle indicates a moderate inclination. And a dot positioned close to the center of the circle indicates a slight inclination. A dot in the center of the circle is no better than one on the edge, and vice versa. Your dot location is near the edge of the circle, so you are **strongly inclined** and probably relate well to the characteristics associated with the iS style.

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

YOUR DISC® STYLE & DOT

Your Dot Tells a Story

Your DiSC Style Is: iS



Because you have an iS style, Matthew, you're probably a warm and sociable manager who reaches out to others with your friendly, laidback approach. Most likely, you make time for casual small talk and have an open-door policy, so people probably think of you as an approachable manager.

When communicating, you tend to be fairly expressive. You're probably genuinely interested in what people have to say, and you may be equally willing to spend time listening and speaking. Because of your desire to connect, you make it clear to others that they are important to you. You may even file away important details about those you work with, such as birthdays or tidbits about their families.

Most likely, you care about other people's needs and often encourage them to share their feelings. You know the right questions to ask to get people to open up, and your supportive nature allows you to both sympathize with people who are struggling and to celebrate with others during their finest moments. In fact, you're often able to overlook personality quirks and weaknesses, and you tend to assume the best in everyone. At times, you might get yourself into trouble by trusting people who don't deserve it.

In terms of time management, you probably have a laid-back, go-with-the-flow approach, and because you tend to be pretty flexible, you can deal with delays or obstacles without becoming frustrated. You'd rather focus on the bright side by tuning in the positive and tuning out the negative. Therefore, you aren't likely to take a firm stance, and sticking to rigid deadlines or policies may be difficult for you. The high value you place on relationships may mean you become distracted easily, as you adapt your schedule to meet the needs of others and have trouble saying no to requests for your time.

You probably genuinely value collaboration, so you may look for opportunities to involve your team when making decisions and solving problems. In fact, you probably see group brainstorming sessions as leading to endless possibilities and do your best to make sure everyone has a chance to contribute and be recognized. You typically consider the impact a decision will have on people's feelings, and you relay unpopular decisions with empathy.

Like other managers with your iS style, you may enjoy the opportunity to help people grow and succeed professionally. Giving immediate feedback when someone has done something well comes easily to you. However, because you want to be liked and respected, it may be more difficult for you to hand out constructive criticism. You may dwell on the situation and its consequences for the relationship. Likewise, your desire to be on friendly terms with everyone may limit your ability to evaluate people's performances.

Above all, you want everyone to be happy, so when you see others at odds, you may step in to try to mend the situation. However, when the conflict involves you personally, you sometimes take a more indirect approach. In fact, you may refuse to deal with negative information even when it's important to do so, and at times you may allow situations to drag on without resolution.

Matthew, like others with the iS style, your most valuable contributions as a manager may include your ability to connect with others, your commitment to building team spirit, and your desire to see people succeed. In fact, these are probably some of the qualities that others admire most about you.

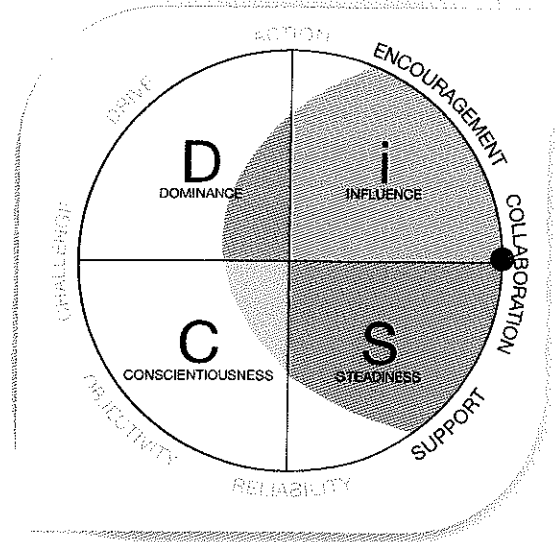
YOUR DiSC[®] PRIORITIES & SHADING

Your Shading Expands the Story

Matthew, while your dot location and your DiSC[®] style can say a great deal about you, your map **shading** is also important.

The eight words around the Everything DiSC map are what we call **priorities**, or the primary areas where people focus their energy. The closer your shading comes to a priority, the more likely you are to focus your energy on that area. Everyone has at least three priorities, and sometimes people have four or five. **Having five priorities is no better than having three, and vice versa.**

Typically, people with your style have shading that touches **Collaboration, Encouragement, and Support.**



What Priorities Shape *Your* Management Experience?

► Valuing Collaboration

Matthew, like other managers with the iS style, you usually emphasize the importance of cooperation and group effort. When managing a team, you probably include others in important activities and decisions, and you may pride yourself on your ability to get everyone involved. Most likely, you value a collaborative environment where people feel safe to speak up and contribute.

► Providing Encouragement

You probably want members of your team to feel energized and optimistic about their work. Therefore, you usually let them know what they're doing right by emphasizing the positive. In fact, you may be so focused on helping people feel good about their efforts that you gloss over bad news. Overall, you tend to provide encouragement by giving people recognition whenever you see an opportunity to do so.

► Giving Support

Managers with the iS style often take a sincere and compassionate approach to managing a team. You're probably approachable and friendly, and you make it clear that you're always available to listen patiently or lend a hand. It can be distressing for you when others are unhappy, and because a warm, sympathetic environment is important to you, you focus on giving support whenever it's needed.

YOUR MANAGEMENT PREFERENCES

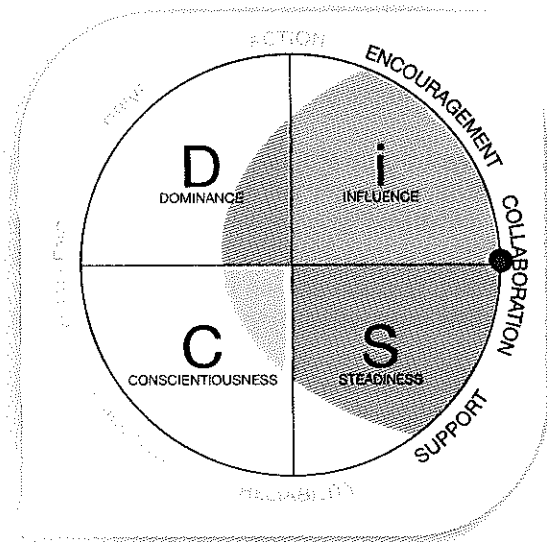
What Do You Enjoy About Managing?

Different people find different aspects of their work motivating. Like other people with the iS style, you may enjoy working with others toward a common goal and helping people succeed professionally. In addition, you likely appreciate that management allows you to help create a collaborative environment where people feel comfortable expressing themselves.

You probably enjoy many of the following aspects of your work:

MOTIVATORS

- Developing warm relationships
- Inspiring others to do their best
- Getting people involved
- Helping people work together
- Complimenting people on a job well done
- Listening sincerely to people's concerns and needs
- Making a positive difference in people's lives
- Creating a warm, friendly environment for yourself and others
- Encouraging optimism in others



What do your priorities say about what motivates you and what you find stressful?

What Drains Your Energy as a Manager?

Then there are those management responsibilities that are stressful for you. Because you prioritize friendly relationships with people, you could be uncomfortable pushing people to accomplish their tasks, and you may have a difficult time creating a sense of urgency or confronting people who aren't performing. Furthermore, you may find it difficult to manage people who are aggressive or combative.

Many of the following aspects of your work may be stressful for you:

STRESSORS

- Sticking to deadlines
- Managing challenging or skeptical people
- Giving people unpleasant feedback
- Being forceful or insistent with others
- Making tough decisions independently
- Being direct about your expectations
- Saying no
- Focusing on the bottom line
- Supporting your position with facts rather than enthusiasm

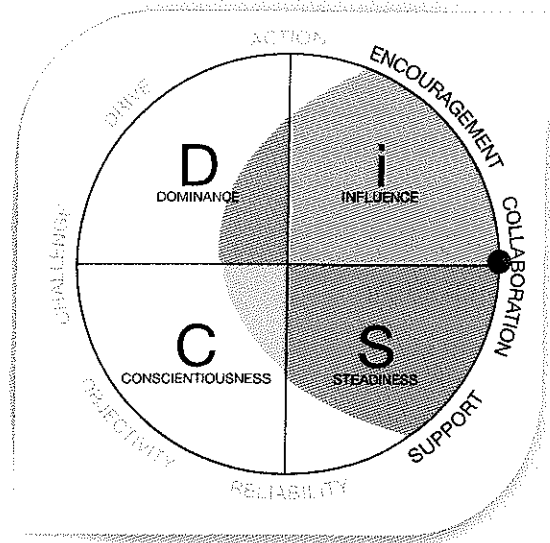
YOUR DIRECTING & DELEGATING STYLE

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

Matthew, because you place a **strong emphasis on collaboration**, you tend to direct people in a friendly, trusting manner. Having power over others probably isn't very important to you, so you likely promote the importance of teamwork and downplay competition.

You also **prefer encouragement** and usually give individuals the benefit of the doubt when delegating tasks. In fact, you may assign responsibilities to team members based on your optimistic outlook rather than their actual experience.

Because you're **supportive**, you usually make sure people know you're there to help when needed. This can take the form of offering advice or just listening to their concerns. However, you may be too lenient at times, and it may be difficult for you to hold people accountable for subpar performances.



How Do You Approach Directing & Delegating?

STRENGTHS

- Making people feel that they are important contributors
- Listening to people's concerns about assignments
- Understanding when extenuating circumstances affect performance
- Making yourself available to help
- Giving direction in a friendly and positive manner
- Checking in with people to see how they are doing

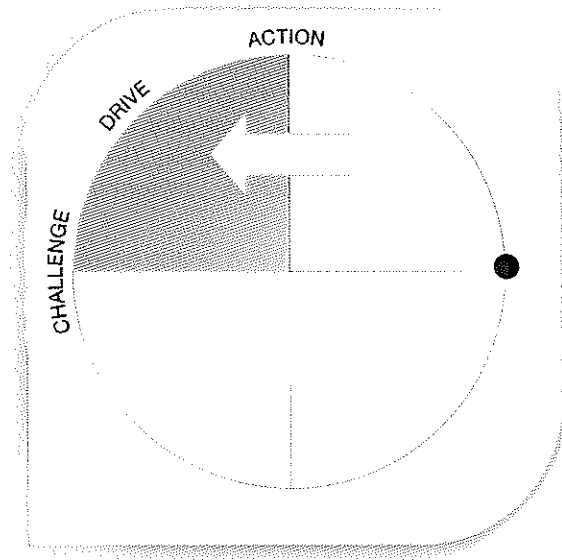
CHALLENGES

- Giving clear, detailed explanations
- Analyzing options before assigning a task
- Pushing people to complete their tasks
- Judging people's abilities or competencies, without overestimating them
- Pushing people for results
- Establishing ambitious outcomes

DIRECTING & DELEGATING TO THE D STYLE

How Does the D Style Like to Work?

People with the D style prioritize the bottom line and are driven to get results. They are willing to be straightforward in the interest of getting things done, and unlike you, they prioritize success over interpersonal needs. They want the freedom to make decisions without input from others, and because they value independence, they may not share your preference to collaborate and work closely as a team. Also, their autonomy and eye-on-the-prize attitude make them less likely to require the encouragement you frequently offer.



Potential Problems When Working Together

People with the D style are often challenging and skeptical, and they may openly question your command if they disagree with your decisions. They may be blunt when expressing their thoughts, which contrasts with your tendency to be friendly and polite. Since you tend to be uncomfortable asserting yourself or confronting people, tension may arise if they challenge your authority. As a result, the need to be firm or defend your decisions may drain your energy, and you may believe that these individuals are too strong-willed about their opinions.

How to Be Effective with the D Style

People with the D style are fast-paced and want to work on exciting projects that will make a big impact. Therefore, encourage them to tackle adventurous tasks, and be sure to show them how their efforts will lead to innovative results. If they have exhibited sound judgment in the past, show respect for their bold ideas and decision-making ability. Check in regularly with those who lack experience and ensure that their confidence doesn't compel them to make decisions beyond their qualifications.

If they're less experienced:

- Don't confuse confidence with competence.
- Review their plans before they move ahead.
- Check in often enough to make sure they're on track.
- Have them check with you before any risky decisions are made.
- Clearly outline the boundaries of their authority, giving them options within those boundaries.

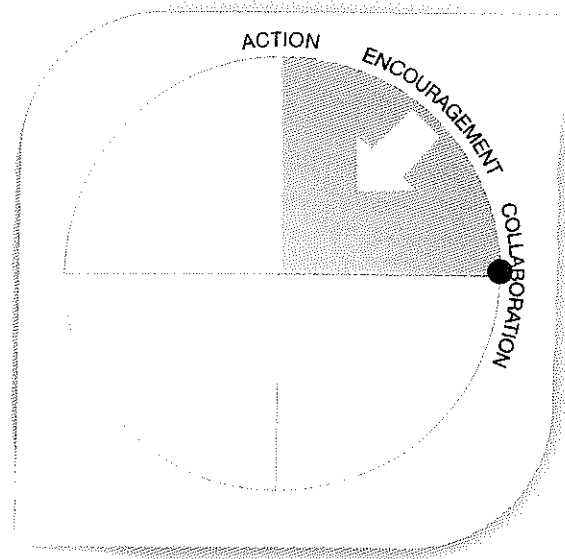
If they're more experienced:

- Show them the most practical way to be productive.
- Make sure you see eye to eye on the goal of the assignment.
- Set a deadline and let them figure out how to proceed.
- Make sure they understand the consequences of their shortcuts.
- Specify the limits of their authority while still allowing for some autonomy.

DIRECTING & DELEGATING TO THE i STYLE

How Does the i Style Like to Work?

Like you, people with the i style are generally upbeat and optimistic. You're both usually sociable and openly expressive, and they probably appreciate your tendency to provide them with encouragement. While you may value their high energy and receptivity to new ideas, you may have trouble matching their high-spirited approach. Furthermore, because they are a bit more extroverted than you tend to be, you may have trouble controlling the course of discussions with them at times.



Potential Problems When Working Together

Like you, people with the i style want to work in a friendly environment where people are valued more than the bottom line. They like to channel their high energy into collaborative efforts and dislike assignments that may isolate them. Because you also tend to be sociable, the two of you may have trouble staying on task, forcing you to scramble at the last minute. And in the event that problems arise, these individuals may brush issues aside by unintentionally taking advantage of your tolerance.

How to Be Effective with the i Style

These individuals tend to move a bit faster than you, and they may be somewhat more interested in adventurous projects than you are. They want to experiment with new ways of doing things and have the freedom to move quickly. You may have to work to keep them on task, so discuss potential issues before they arise. Let people with experience know that you'll consider their ideas, and check in frequently with those who lack experience to make sure they don't allow important details or tasks to slip through the cracks.

If they're less experienced:

- Make sure they don't lose track of details.
- Hold them accountable for missed deadlines or skipped steps.
- Help them prioritize.
- Ensure that they follow through on their tasks.
- Redirect their energy if socializing takes them off track.

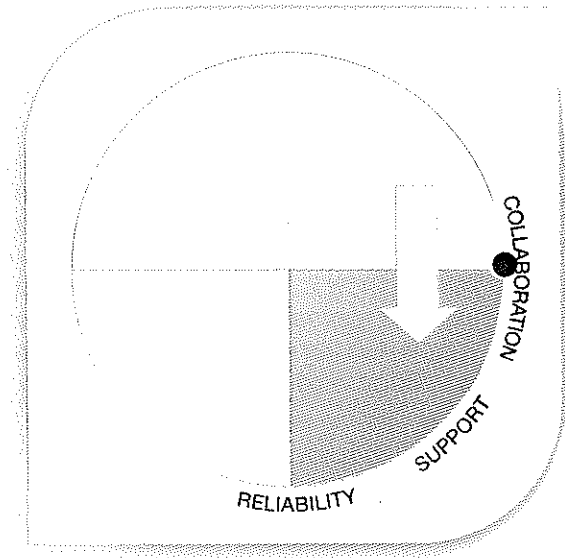
If they're more experienced:

- Allow them to take the lead in group settings.
- Make time to go over the details with them.
- Acknowledge their contributions publicly.
- Keep them on track and on schedule.
- Be open-minded to their more adventurous ideas.

DIRECTING & DELEGATING TO THE S STYLE

How Does the S Style Like to Work?

Like you, people with the S style are accommodating and flexible. Because they look for reassurances that they are doing a good job, they'll appreciate that you tend to offer support and encouragement. You may find that they accept direction easily, although they may be hesitant to take initiative or point out problems. And because they want to know exactly what's required of them, they'll respond positively if you give directions in a friendly manner that paints a clear picture of the desired results.



Potential Problems When Working Together

These individuals strive to make steady, careful progress toward predictable goals. Because they prefer traditional approaches, they may resist new or better ways of accomplishing tasks. They are unlikely to ask for challenges that could disrupt their routine, so you may need to be straightforward about your expectations when delegating responsibilities to them, and this may be less natural for you. While you might be frustrated with their hesitancy, you also may fail to give them tough feedback, since you want to avoid causing tension.

How to Be Effective with the S Style

Like you, people with the S style may be most comfortable in friendly, cooperative environments. They share your desire to collaborate and form personal relationships. For those who lack experience, give them step-by-step instructions and reassure them that they have the skills and talent to perform well. For those with more experience, encourage them to take chances and push for more autonomy, but make it clear that you're available to advise them when needed.

If they're less experienced:

- Give clear, step-by-step directions.
- Ask questions to confirm their understanding.
- Check in with them frequently.
- Refrain from giving them too much responsibility too quickly.
- Avoid pushing them to move ahead before they are ready.

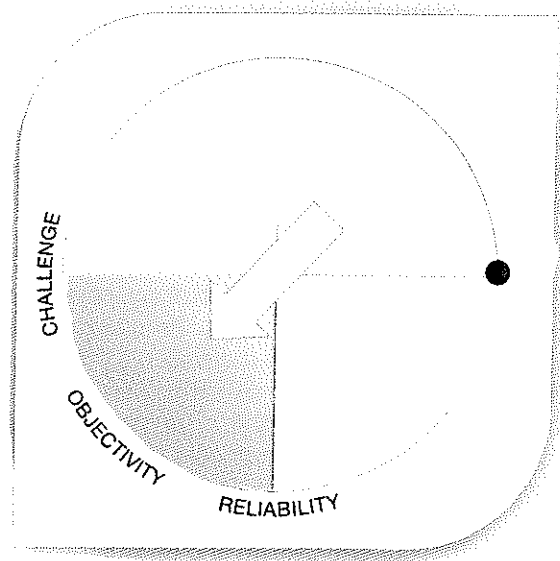
If they're more experienced:

- Ask enough questions to elicit their concerns.
- Give them additional responsibilities when they seem ready for more challenges.
- Encourage them to take initiative.
- Make yourself available as an advisor.
- Ask them directly what kind of support they need.

DIRECTING & DELEGATING TO THE C STYLE

How Does the C Style Like to Work?

People with the C style relate best to clear objectives and fact-based ideas. They go over options and proposals carefully and appreciate having time to analyze their work. Unlike you, they don't value collaborative environments, but rather they prefer working independently. In fact, unless there is a specific purpose, these individuals often view social interactions as a waste of time. Furthermore, they probably don't identify with your emphasis on personal relationships and may resent attempts to get them to open up.



Potential Problems When Working Together

These individuals want to produce dependable outcomes, so they tend to thoroughly consider all the consequences before choosing a plan. Because they take great care to get things right, they pay close attention to the specifics and are unlikely to rush through their tasks. However, you tend to be more trusting and optimistic, so you may become frustrated if they second-guess your plans. At the same time, they may view your laid-back, friendly approach as too unstructured for their needs.

How to Be Effective with the C Style

People with the C style are more skeptical than you tend to be, but keep in mind that their questioning nature is just their way of processing new information. Therefore, listen to their concerns over possible flaws, and allow them to challenge traditional methods. Those with less experience may spend too much time perfecting their work, so be sure to check in frequently enough to keep them on track. Those with more experience may seek autonomy, so allow them to work alone as much as possible, but refrain from letting them isolate themselves.

If they're less experienced:

- Avoid forcing them to collaborate unless it's necessary.
- Give them tasks that require logic.
- Make sure they have the resources they need.
- Check in to make sure they aren't getting bogged down.
- Help them obtain quality without putting deadlines at risk.

If they're more experienced:

- Check in with them only to ensure forward progress.
- Encourage them to ask for more direction if they need it.
- Allow them to work independently when possible.
- Listen to their concerns about quality.
- Give them opportunities to help solve complex issues.

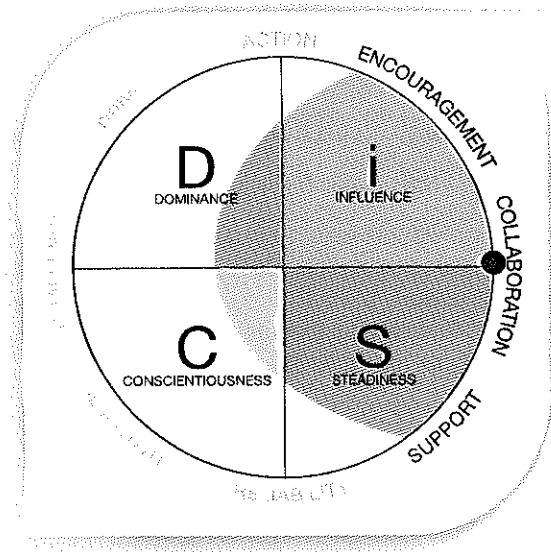
MOTIVATION AND THE ENVIRONMENT YOU CREATE

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

Matthew, your **focus on collaboration** motivates people by building trust among coworkers. People who feel that group efforts are appreciated are more likely to seek opportunities to brainstorm together and make improvements, without concern for who receives the credit. And for many people, being part of a cooperative, cheerful team boosts their enjoyment and energy at work.

Because of your **enthusiasm and encouragement**, you help create an environment where people feel recognized and accepted. You probably help your team see that work can be fun, and as a result, people may be more upbeat and optimistic about their tasks and contributions.

Most likely, your **supportive nature** allows you to create a trusting environment where people feel comfortable coming to work every day. Just knowing that someone cares about them on the job can be extremely motivating for many people. Further, you readily offer credit and compliments so that others feel a greater sense of ownership in team success.



The Environment You Create

- Because of your encouragement, people feel good about their work.
- When you celebrate victories, people feel more ownership in the outcomes of their work.
- Because you build teams, people feel a sense of camaraderie.
- Because you are understanding and patient, people waste less energy worrying about mistakes.
- Your optimism and enthusiasm can make work more fun.
- When you put confidence in others, they may feel empowered to use creative approaches.

MOTIVATION AND THE D STYLE

What Are the Motivational Needs of the D Style?

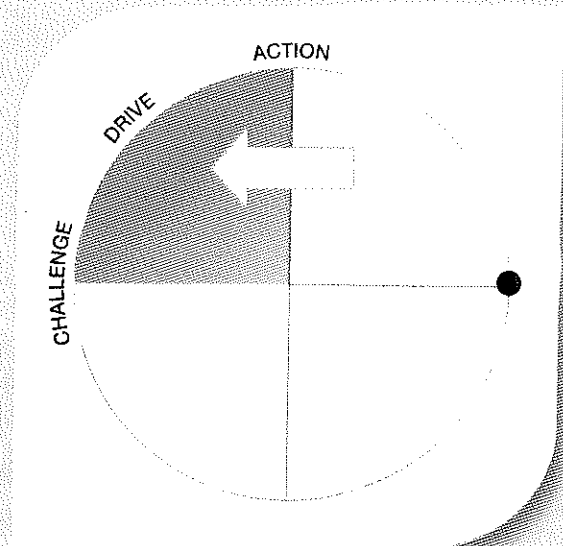
Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. They're driven to achieve, probably more so than you, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, they want to move quickly and make a big impact with innovative or daring ideas, a desire with which you may not identify. In fact, they may be so focused on individual career growth that they disregard the needs of others, and you may have trouble understanding their challenging approach.

What demotivates the D style?

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

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

- Employees with this style may embrace conflict as a way to create win-lose situations.
- They may be energized by the competitive aspects of conflict.
- They may waste energy dwelling on who is at fault.



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

- Provide concrete, practical goals to work toward.
- Let them work autonomously when teamwork isn't required.
- Validate their individuality by giving them reasonable freedom to create their own work environment.
- Channel their competitive spirit into areas that will help the team.
- Give them challenging projects that may allow them to garner more respect and influence.
- Outline the big-picture purpose of new projects to gain buy-in.

What's the best way for you to **recognize and reward** the D style?

- Praise them by highlighting the unique contributions they make to team success.
- Recognize their growth by giving them more responsibility and autonomy.
- Point out how their ideas help the organization.
- Reward them with advancement opportunities when their performance shows they're ready for more challenges.

MOTIVATION AND THE i STYLE

What Are the Motivational Needs of the i Style?

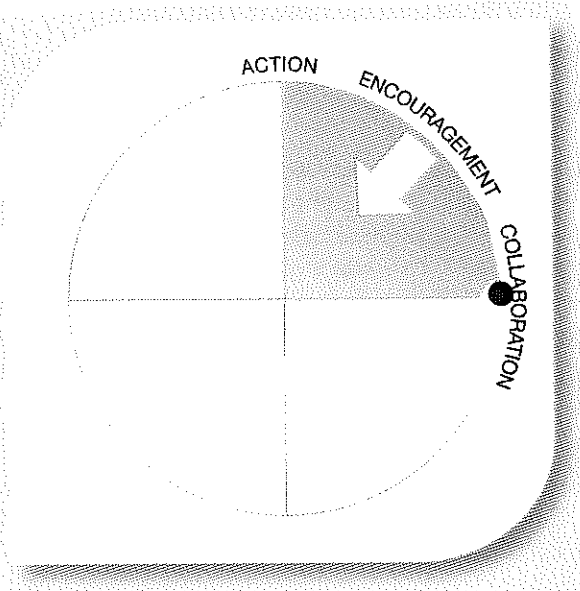
Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. They're eager to collaborate, as you probably are, so they're likely to put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they often work at a fast pace and indulge in a variety of tasks, an approach with which you may not identify. Those with the i style are also motivated by public recognition, and like you, they appreciate a warm and encouraging environment.

What **demotivates** the i style?

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

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

- Conflict may make them emotional or angry, and as a result may negatively affect their performance.
- They may take conflict personally, which could de-energize them.
- They may dwell on the conflict rather than focus on their tasks.



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

- Let them collaborate with you and others.
- Encourage their positive energy and give them opportunities to express themselves.
- Limit the predictability and routine of their tasks when possible.
- Reinforce their optimism with your natural enthusiasm and energy.
- Give them opportunities to be in the limelight.
- Provide some time to socialize and network.

What's the best way for you to **recognize and reward** the i style?

- Praise them enthusiastically in front of other colleagues, and thank them for their energy and passion.
- Make them feel like an indispensable member of your team.
- Reward their best work with new opportunities to shine.
- Recommend them for awards or advancement opportunities when they've proven themselves capable.

MOTIVATION AND THE S STYLE

What Are the Motivational Needs of the S Style?

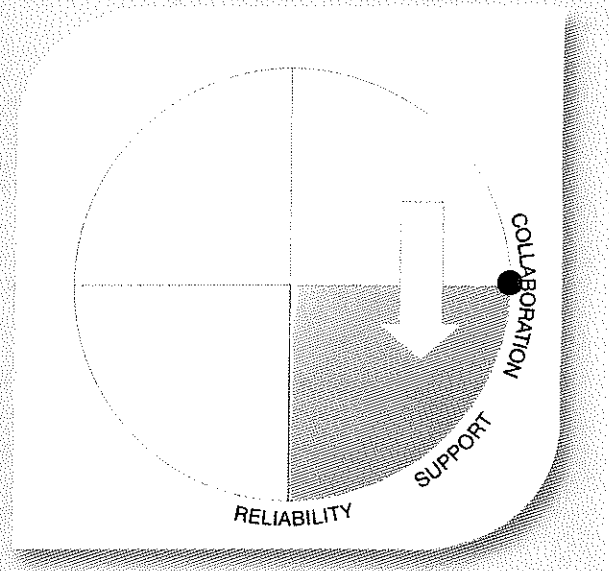
People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. Like you, they tend to be supportive, and may even withhold their own opinions to accommodate or please other people. In addition, they like to connect with colleagues on a personal level by working in a collaborative setting, and you may appreciate their affinity for teamwork. Furthermore, they want to be seen as reliable and to have enough time to perform their duties without being rushed or stressed, which probably isn't as important to you.

What demotivates the S style?

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

How does conflict affect the motivation of the S style?

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



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

- Provide ample time for them to produce results.
- Let them collaborate with others, but don't push them to be more social than they want to be.
- Be clear about their tasks and responsibilities and don't skip the details.
- Plan ahead to be able to give plenty of warning when changes are coming.
- Ask for their ideas, which they might not share without encouragement.
- Give them a sense of security and structure.

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

- Reward reliable and steady work by letting them know that you trust them with more important projects.
- Recognize their steadiness, support, and helpfulness by making them feel like a vital part of the team.
- Acknowledge their hard work by giving them warm and sincere praise in a one-on-one setting.
- Discuss potential advancement opportunities when you think they're ready for further challenges.

MOTIVATION AND THE C STYLE

What Are the Motivational Needs of the C Style?

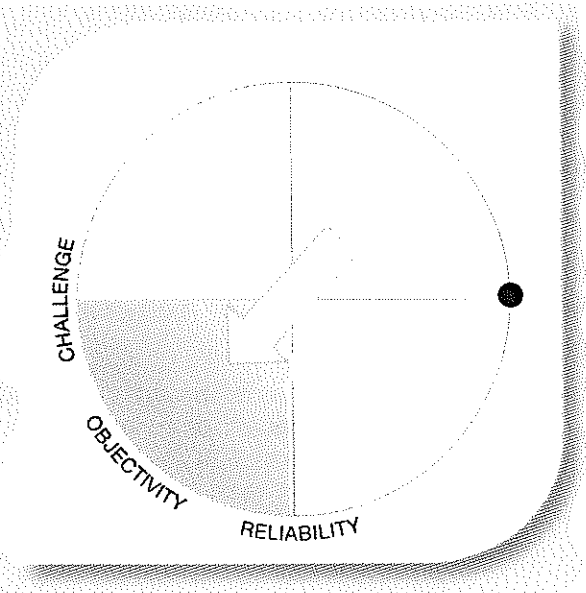
Employees with the C style look for an environment where they will have time to analyze ideas and ensure flawless outcomes. They want to produce work that's reliable, so they prefer to maintain a moderate pace and exercise a sense of caution, which isn't one of your top priorities. Because they tend to be even more objective than you are, they like to weigh all the options and gather all the facts before making decisions. Also, they want to master their responsibilities, so they often challenge ideas to ensure accuracy, an approach you probably don't share.

What **demotivates** the C style?

- Being required to work collaboratively
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Having to make quick decisions
- Being wrong

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

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



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

- Explain the purpose of tasks logically rather than enthusiastically.
- Encourage them to help define quality standards.
- Listen to their insights about projects or tasks.
- Provide opportunities for independent work rather than focusing on collaboration.
- Convey your expectations clearly and specifically.
- Give them time and space to perform on their terms.

What's the best way for you to **recognize and reward** the C style?

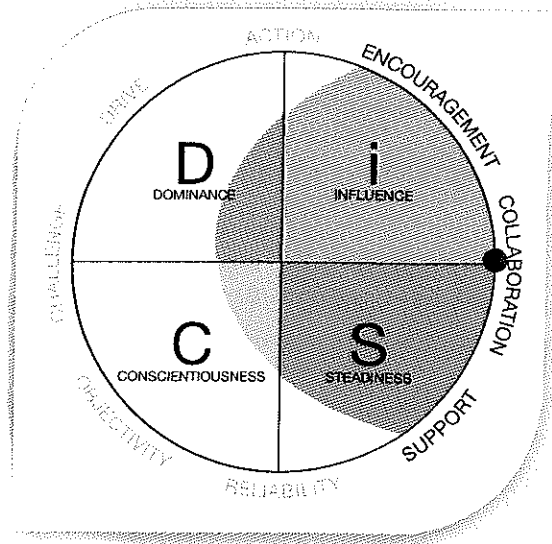
- Compliment them privately by focusing on specifics and avoiding sweeping praise.
- Acknowledge that their accuracy contributes greatly to team success.
- Recognize their gifts for analysis, logic, and problem solving, and help them build on these areas of expertise.
- Reward quality work by allowing increased autonomy on subsequent projects.

YOUR APPROACH TO DEVELOPING OTHERS

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

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

Matthew, because you have a collaborative spirit, you probably enjoy mentoring others and helping them reach their full potential. Most likely, you establish working relationships in which the people you manage feel understood, making sure they know that their talents and contributions are appreciated. And because you want your team to succeed, you likely pass exciting and potentially rewarding opportunities to people who are ready for the challenge. Overall, your open-door policy and approachable personality allow people to bring their concerns, questions, and dreams to you without fear, and your team spirit inspires individual and collective productivity.



Your Development Approach

ADVANTAGES

- Making yourself available for mentoring
- Boosting others' self-confidence with your belief in their abilities
- Providing regular, informal follow-up on people's development
- Making people feel good about their progress
- Taking the time to listen to people's real concerns
- Giving feedback in a considerate manner

DISADVANTAGES

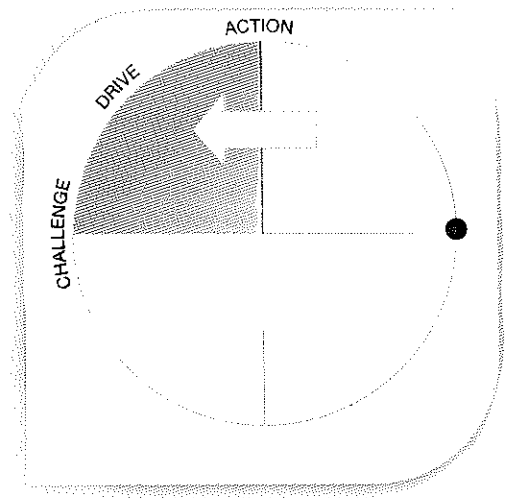
- Being too tolerant when people fail to meet your expectations
- Failing to recognize less obvious opportunities that are available for others
- Being so accepting that you don't let yourself see obstacles holding people back
- Focusing exclusively on the positive behaviors of employees
- Failing to consider whether development plans are well-suited to the employee
- Neglecting to identify specifics about employee development plans

DEVELOPING YOUR "D" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Drive

People with the D style like to take an idea and run with it, but it may not always be the correct idea. Monitor their progress while allowing them the autonomy that they crave. Without some independence, they are likely to become frustrated. Since these individuals are so focused on personal success, they may fail to see the importance of organizational goals and teamwork.

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

Action

These individuals like to keep a fast pace and may look for quick advancement. They tend to focus on the task at hand and may fail to see the value of long-term planning. However, such a plan could capitalize on their energy for the mutual benefit of themselves and the team. If they resist methodical planning, point out the immediate benefits to them.

- Encourage them to identify new skills that will help their advancement.
- Help them slow down to think through their development path.
- Review the big picture and allow them to come up with appropriate long-term goals.

Challenge

People with the D style probably think that they can do it all. They may be skeptical about your positive and supportive approach to development. These individuals don't enjoy collaborative efforts like you do, so allow them plenty of autonomy, but be prepared to assert your authority if they question you.

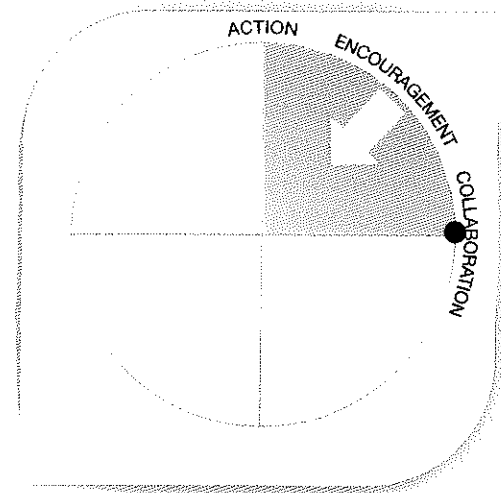
- Let them work independently, but help them see the value of multiple perspectives.
- Challenge yourself to give them frank, results-oriented feedback when necessary.
- Give them opportunities to exercise authority.

DEVELOPING YOUR “I” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Encouragement

Like you, people with the i style delight in positive feedback, and you're usually generous in delivering it. Sometimes, these individuals need to hear a realistic evaluation that identifies areas where they need to grow. This may be difficult for both the messenger and the recipient, but you can still be upbeat in your approach.

- Continue to be optimistic when assessing their development, but don't ignore problems.
- You may need to offer tougher feedback at times.
- Check to make sure they understand the gravity of your constructive criticism.

Action

These individuals like to keep moving and may avoid intense professional development work. They're easily distracted, and you may need to rein them in to get a plan down on paper. Since putting your foot down may be difficult for you, you may need to be disciplined about setting clear expectations in this area.

- Avoid creating development plans that are vague or that rely on overly optimistic scenarios.
- Point out the negative consequences of not taking the time to develop skills with deliberate effort.
- Encourage their spontaneity when appropriate.

Collaboration

Like you, these individuals love to work with others. Group projects showcase their charisma and strong people skills. However, when taken to an extreme, these same qualities enable them to avoid pulling their own weight. Challenge yourself to push these individuals to grow personally and hone their skills.

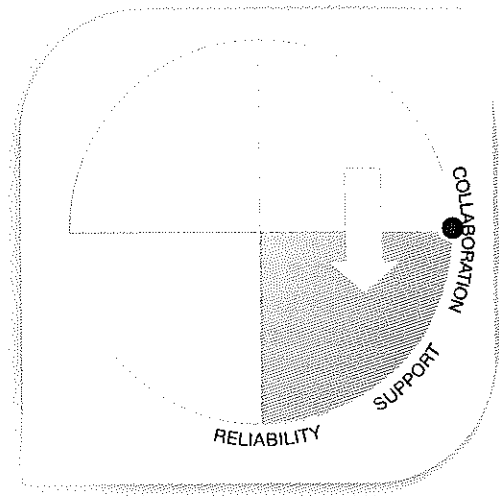
- Encourage them to pursue opportunities that involve working with others.
- Allow them to lead small groups.
- Remind them that their growth will also depend on independent work.

DEVELOPING YOUR "S" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Support

People with the S style want to know that they are meeting your expectations, and you may provide the support they are looking for. They are happy to be part of the team's success and may not seek opportunities for personal achievement. And since you tend to be so accommodating, you may enable them to stay in this comfort zone even if it doesn't promote their professional growth.

- Push them gently to grow and develop.
- Remind them that they have to focus on their own needs at times.
- Show patience and understanding for their fears and concerns.

Reliability

They struggle with rapid change, so they strive to maintain comfortable environments. And because they like dependability and stability, they probably seek some structure from you when laying out their professional development. However, you tend to be laid-back and may not push them take reasonable chances in their professional growth.

- Encourage them to maintain their focus on reliable progress.
- Let them know that development often means moving in new directions.
- Respond to their need for structure by creating concrete development plans.

Collaboration

Like you, people with the S style like working with others, but their focus on collaboration may be at the expense of individual opportunities for growth. At the same time, you may not provide enough constructive criticism because you don't want to hurt their feelings, which could hinder them down the line.

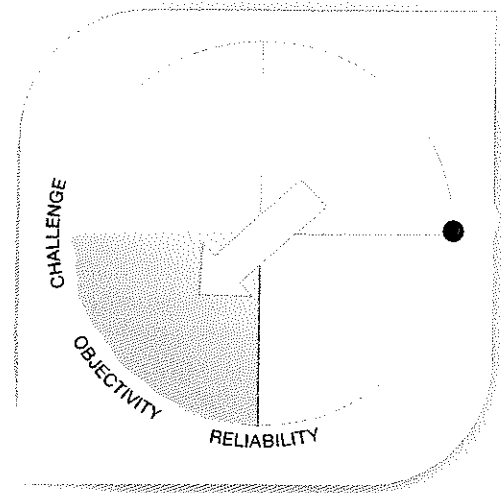
- Encourage them to pursue opportunities that let them work with others.
- Show them that they have the strength to work autonomously.
- Offer constructive feedback when necessary.

DEVELOPING YOUR “C” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Objectivity

People with the C style usually make decisions based on logic. Since you are probably more intuitive and passionate, you may be on different wavelengths regarding their development. You may embrace exciting new opportunities, but they need time and information before acting. Because they rely heavily on analysis, they may resist your role in their development.

- Steer them toward analytical development opportunities.
- Respect their independence, but remind them that you can be an advocate for their development.
- Avoid forcing them to socialize, but reinforce the importance of teamwork.

Reliability

These individuals strive to produce accurate work, so they often adhere to the status quo. Since you are so easygoing, you may allow them to stay in their comfort zone, but always playing it safe isn't likely to lead to growth. Push them to stray from predictable development options, but be sure to provide clear plans.

- Propose clear, well-organized development opportunities.
- Recognize that they may struggle to admit their limitations or errors.
- Don't let them cling to safe development plans that won't further their growth.

Challenge

People with the C style probably don't accept ideas as readily as you do, so they may resist your suggestions for their development. Don't rely on enthusiasm to present ideas, as they will question any proposal that's not backed by data and facts. Since you're so laid-back, you may struggle to stand up to them.

- Expect that you'll have to back up your ideas with evidence if you want buy-in.
- Field their questions, but rein them in if their questioning becomes unproductive.
- Give them constructive feedback if they seem to cling to an idea out of stubbornness.

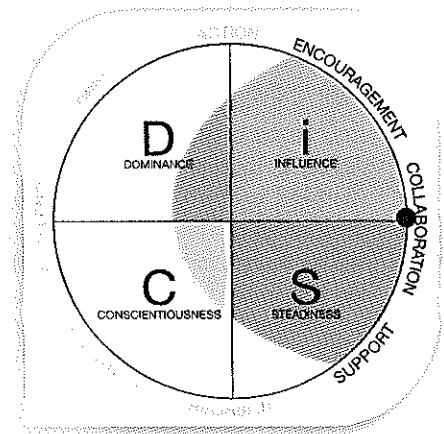
HOW YOUR MANAGER SEES YOU

One of the most important but often overlooked aspects of management is sometimes called “managing up.” This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. This page provides insight into how your manager might see you.

► Collaborative

Matthew, since you have an iS style, you probably come across as open and accepting. Your manager may appreciate your focus on building your team and making everyone part of the solution. On the other hand, your preference for working in groups could cause some managers to question whether you can make strong individual contributions, while others may think you spend too much time on social activities.

- Some managers are more likely to respect someone who acts independently.
- Your manager may think you're too focused on consensus.



► Encouraging

Many managers will appreciate your enthusiasm and may see you as someone who can make anyone feel good about their contributions to the team. In fact, your manager may believe your positivity can be infectious and uplifting. On the other hand, some managers may think you appear to overestimate people's abilities, while others may think you are unwilling to face unpleasant facts.

- Some managers may see you as unrealistically optimistic.
- Your manager may prioritize facts over passion.

► Supportive

Many managers will appreciate that you avoid becoming pushy or demanding when directing others. Furthermore, they may see your openness to people's ideas as valuable in creating a healthy team environment. However, some stricter managers may think you neglect to hold people accountable, even when their performances are subpar.

- Some managers are more likely to respect someone who will address tough issues directly and forcefully.
- Your manager may see you as overly lenient with people who are underperforming.

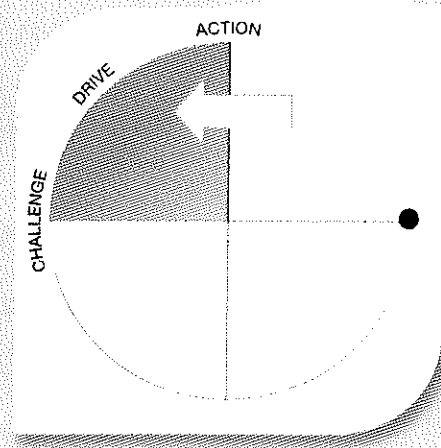
WORKING WITH “D” MANAGERS

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

Their Priorities & Preferences

Managers with the D style put a strong emphasis on drive and are active in pursuing bottom-line results. They can be demanding and blunt and won't hesitate to voice their skepticism. Overall, they respond best to people who can quickly help them achieve success.

- Unlike you, their drive for results may cause them to overlook people's feelings or make compromises to quality.
- Unlike you, they prioritize action and want to keep progressing at a rapid pace.
- Unlike you, they tend to openly challenge the status quo and pressure others to meet their high standards.



Advocating & Getting Buy-In

Managers with the D style tend to make firm decisions and can be very strong-willed. They respond best to people who have a no-nonsense, results-oriented style, and because you usually take a cheerful, easygoing approach, they may fail to take your ideas seriously. Therefore, be sure to express confidence in your decisions, and demonstrate that you can get things done without handholding. Furthermore, forward progress at a rapid pace is very important to them, so show them how your ideas can help them reach their goals quickly. Lay out the big picture simply and directly, and avoid the excessive enthusiasm that can make them suspicious. Because they want to feel in control, they may dismiss an idea if they believe that you ignored their advice. Therefore show respect for their leadership, and offer them an ownership stake in the solution.

- Don't let your accommodating nature keep you from being a strong advocate.
- Project confidence in the results you are promising.
- Ask for their advice and keep them in the loop.

Dealing with Conflict

Managers with the D style can become competitive in conflict, creating win-lose scenarios without room for compromise. They may be very direct and aren't inclined to avoid confrontation. This differs quite a bit from your tendency to prioritize positive relationships over winning an argument. Because they respect people who stand up for themselves and their ideas, don't put on a happy face or gloss over differences just to keep the peace. Be firm in laying out your position. Avoid taking their straightforward feedback personally and state your points objectively without becoming emotional.

- Don't give in just to keep things friendly.
- Be aware that hiding your feelings could be more harmful than speaking candidly.
- Avoid viewing their perspective as a personal attack.

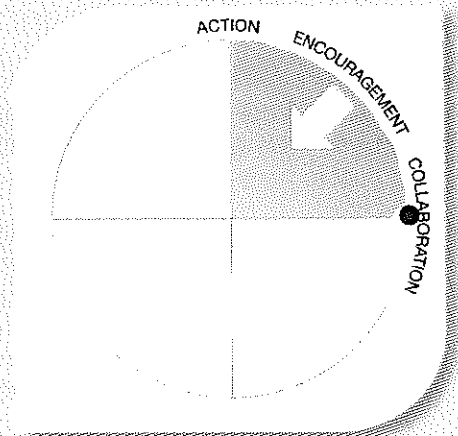
WORKING WITH “I” MANAGERS

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

Their Priorities & Preferences

Managers with the i style tend to be energetic and encourage others to do their best. Overall, they want to lead a fast-paced but friendly team, and they will likely respond best to people who like to create an optimistic team spirit.

- Like you, they give people recognition and celebrate group victories.
- Like you, they prefer to work with others and prioritize teamwork.
- Unlike you, they focus on action and move quickly while striving for forward progress.



Advocating & Getting Buy-In

Managers with the i style look for cooperation and want to know how your solutions will affect other people. Like you, they're interested in finding ways to interact, and they may become so caught up in a plan's potential that they dominate the conversation. To gain their buy-in, let them know that your solution has the power to invigorate people. Create an open dialogue, and emphasize how the team can work together to achieve your goals. Furthermore, they're interested in fast movement and groundbreaking solutions, so lay out the big picture and assure them that things can happen quickly once you gain their buy-in.

- Emphasize how your ideas can quickly energize people.
- Let them know how your plans will affect other people.
- Assert yourself to make sure they hear your ideas.

Dealing with Conflict

Managers with the i style want to maintain friendly relationships, so they may initially gloss over differences to avoid conflict. However, self-expression is very important to them, and they may insist on making their feelings clear when things get tense. In contrast, you usually take a somewhat more diplomatic approach and may give in to their demands to avoid negative feelings. Even though you would rather not deal with conflict, trying to sidestep it may lead to resentment. Express your concern for their feelings and a desire to work through the problem quickly but thoroughly. Let them know that you want to maintain a good relationship.

- Address the conflict directly, but let them know you care about their feelings.
- Make clear that your relationship is still strong.
- Try not to take any anger personally.

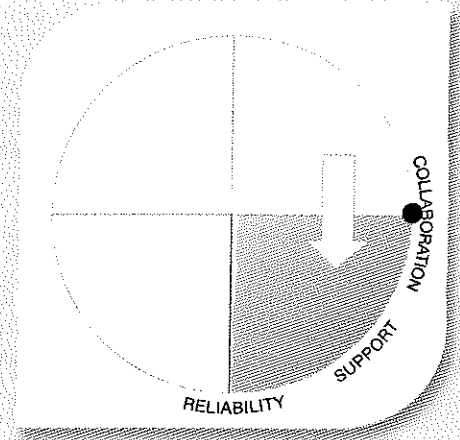
WORKING WITH "S" MANAGERS

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

Their Priorities & Preferences

Managers with the S style tend to be accommodating and dependable. Overall, they want to lead a team in a calm setting where tension is rare, and they will likely respond best to people who are friendly team players.

- Like you, they emphasize supporting others and have empathy for people's needs.
- Like you, they prioritize collaboration and want people to work together harmoniously.
- Unlike you, they often dodge change in order to maintain a dependable setting.



Advocating & Getting Buy-In

Managers with the S style want to see how your ideas can contribute to steady progress and reliable results. Because they want time to process information, avoid pushing them for an immediate decision. Furthermore, like you, they're interested in collaboration and team unity, so specify how your solution can bring the group together. They often see both sides of an issue and pay attention to its impact on people. If you want their buy-in, express confidence in your proposals, but don't dismiss their concerns, and avoid coming across as overly enthusiastic. Ask them for feedback, and let them know how your plan can be beneficial to others.

- Lay out your plan in a step-by-step manner.
- Emphasize how your idea helps people.
- Don't rely on enthusiasm to sway their opinion.

Dealing with Conflict

Managers with the S style want to avoid conflict whenever possible, so they may give in quickly or even deny there is a problem. You also tend to dislike confrontations, so the two of you probably have trouble addressing problems head-on. This mutual disdain for conflict can lead to festering issues, so take a more direct approach to prevent bad feelings from intensifying. Refrain from taking things personally, and work through the conflict quickly but thoroughly. Don't assume their silence means the matter is resolved. You may need to ask them more than once to uncover their true concerns.

- Address the situation directly rather than masking your differences.
- Follow up to make sure the issue is resolved.
- Acknowledge the importance of everyone's feelings.

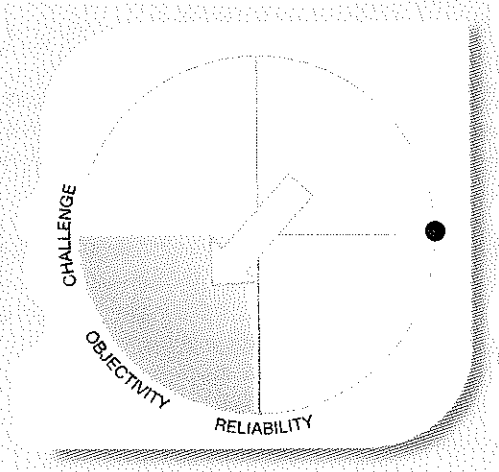
WORKING WITH “C” MANAGERS

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

Their Priorities & Preferences

Managers with the C style put a strong emphasis on logic and maintaining a stable environment. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

- Unlike you, they spend a lot of time on objective analysis to ensure accuracy.
- Unlike you, they tend to move cautiously in order to deliver a reliable outcome.
- Unlike you, they tend to show open skepticism for ideas that aren't backed up by facts.



Advocating & Getting Buy-In

Managers with the C style want to see how your ideas can lead to a high-quality solution. They want to anticipate potential complications, so they're likely to ask a lot of skeptical questions. Therefore, you'll need to provide enough data to prove your competence. Don't become frustrated or take it personally if they continue pressing you for details, as they simply want to eliminate flaws and ensure the best outcome. Furthermore, they're more interested in reliability than speed, so you may need to show them that you've thought through all of the consequences of your plan. Stick to the facts and avoid relying on enthusiasm. To gain their buy-in, present your ideas clearly and rationally, and give them the time they need to process all the information.

- Lay out your plan clearly and avoid skipping the specifics.
- Be ready to provide all the facts and data they need to reach a decision.
- Remember that their questions are aimed at testing the idea and not at attacking you.

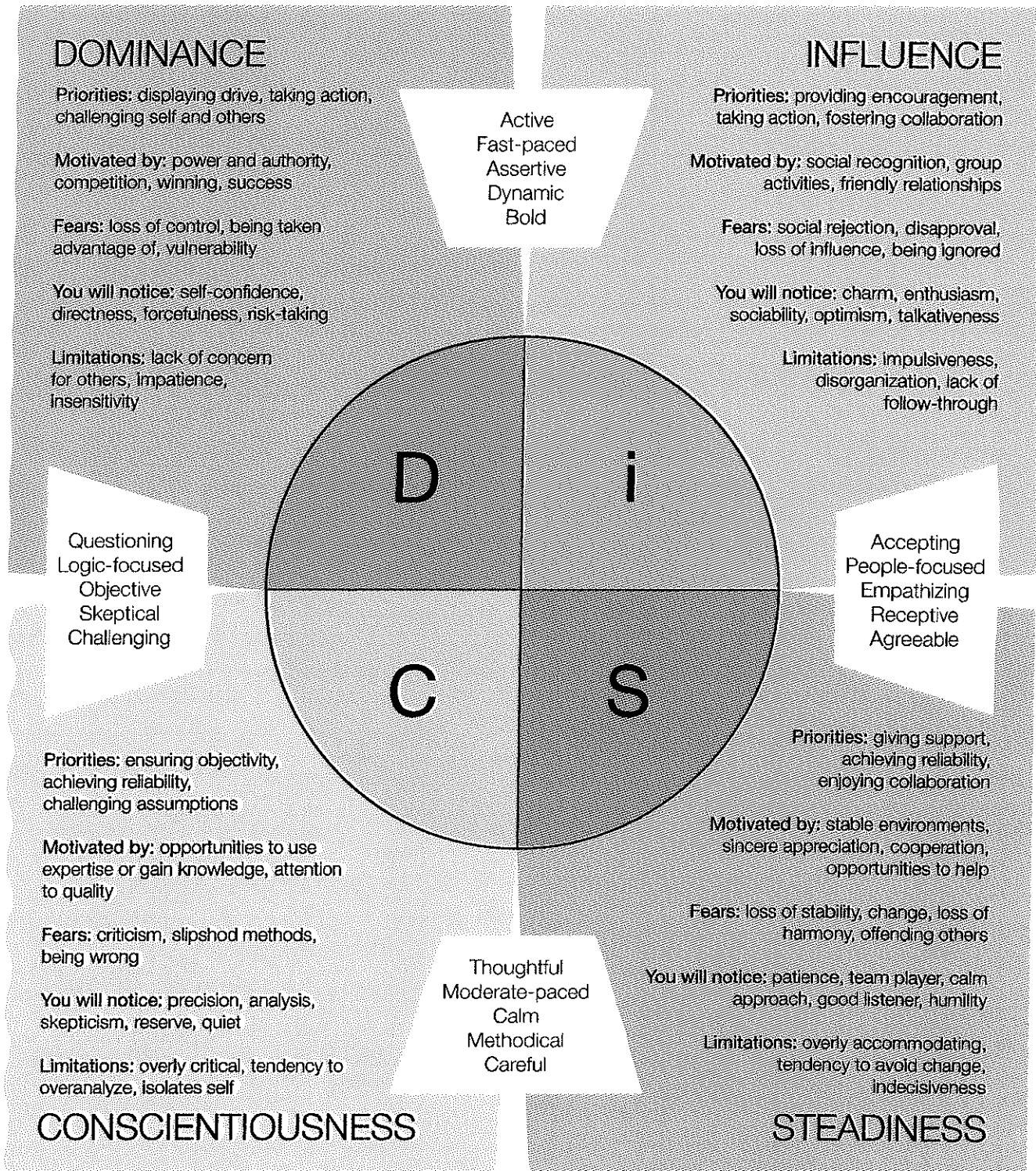
Dealing with Conflict

Managers with the C style view conflict as a disagreement over who is correct, so they may try to overpower opposing viewpoints with logic. They want to remain objective and tend to dodge direct aggression. If emotions run high, however, they may withdraw completely. Because you tend to gloss over differences, the two of you may fail to reach any meaningful resolutions. Therefore, you may need to focus more on facts in order to hear their side of the story. Keep in mind that discussing feelings may make them uncomfortable. To be most effective, state your position objectively and give them time to present their side.

- Support your opinions with logic and facts.
- Refrain from making emotional appeals.
- Assert your own position instead of just giving in.

APPENDIX: OVERVIEW OF THE DISC® STYLES

The graphic below provides a snapshot of the four basic DiSC® styles.



ROBIN R. HAYES

rhayes312@hotmail.com

January 5, 2018

Honorable Mayor and City Councilmembers
City of Palm Coast

Honorable Mayor and City Councilmembers:

I am pleased to submit my qualifications for the City Manager position. The opportunity to lead the City of Palm Coast organization on behalf of the City Council excites me. To decide if I am the individual to implement policy directives and lead the organization on behalf of the City Council, the members of the Council should understand the personal characteristics which I would bring to the organization. Honesty, fairness, experience, dedication, loyalty, caring, innovative, integrity, listener, consensus builder, a focus on follow-through, fosters trust and set examples for high performance.

As you can see from the enclosed resume, I am an achievement-oriented manager with seventeen plus years' experience in municipal government and several years' experience in county government. I have focused on building a high performance, transparent, citizen-friendly City administration. This approach encourages individuals to be self-thinkers and to act within the parameters set by the management team, supported by the policies as set forth by the City Council. It encourages teamwork while empowering the staff to make decisions appropriate for the City. An organization is only as good as its people and I believe that we do our taxpayers a disservice if we are not pro-active in developing employees while focusing on our community.

I believe I bring an ability to solve problems rapidly, foresee potential problems, and implement strategies to correct or solve them. I have a proven record providing administrative guidance to departments to ensure the City's goals and objectives are achieved, in a timely and professional manner. I also bring the ability to interact effectively with people from a wide variety of ethnic and socio-economic backgrounds as well as the ability to work effectively with the media and committees.

I am a skilled and qualified professional with a background in diverse aspects of executive leadership, budgeting, communications, customer service, strategic planning, financial stewardship, and economic development and CRA administration. Please consider the following highlights from my resume:

- Excellent leadership as the City Manager and directing teams and initiatives, and an extensive knowledge of municipal government.
- Comprehensive background in financial reporting, financial analysis, forecasting, budget management, cash flow management and fixed assets.
- Championed strategic planning, performance measurement, statistical modeling and discussion forums with the City Council and Citizen Groups.
- Comprehensive background in managing a Community Redevelopment Agency, with direct involvement in Economic Development.

As the City Manager of Palm Coast, you will find me to be energetic and innovative. A City Manager who will cultivate a relationship with the citizens; concentrate on consistently achieving the objectives; and fosters a friendly trust in a positive environment. I sincerely hope that as you read my resume and specific skills you become as excited about the opportunity to interview me, as I am to get better acquainted with you. I am eager to compete for the position of City Manager and prepared to answer any additional questions or concerns you may have.

The enclosed resume briefly outlines my experience and accomplishments. I look forward to hearing from you. Thank you for your time and consideration. I wish you the best in your search for the right City Manager to lead Palm Coast into the future.

Sincerely,

Robin R. Hayes

ROBIN R. HAYES

rhayes512@notmail.com

Highly accomplished and seasoned Business Executive with the ability to manage City operations, customer service and communications, finance, budgeting, and strategic planning. A dedicated leader who is able to work within the organizational framework as established by the policy making body, focus on the services provided, infrastructure, and public safety. A City Manager who manages within a dynamically changing environment requiring focused decision-making, assertive, energetic, and ethically sound. Approximately seventeen years of municipal management experience with particular expertise in the following areas:

AREAS OF EXPERTISE

- Operations Manager
- Budget Management
- Capital Planning Long-Term
- Strategic Development and Planning
- Process Improvement
- Communication Skills
- Business Development
- Fiscal Management
- Change Agent
- Collective Bargaining

RELEVANT LOCAL GOVERNMENT EXPERIENCE

CITY OF MOUNT DORA, MOUNT DORA, FLORIDA (SEPTEMBER 2016 – PRESENT) *CITY MANAGER*

Manage the Operations of the City, implementing the Policies as set-forth by the City Council, Charter, and Florida Statutes. Transparent management, good communication, commitment to accountability, consensus builder among legislative branch, community member, and a change agent. Extensive experience with Economic Development – creating a plan and implementing the future direction of the Wolf Branch Innovation District, but also in the Downtown area of the City by bringing new businesses; full understanding of how CRA's (Community Redevelopment Agency's) preform within a City; Knowledge and experience with Infrastructure (Roads, Streets, Sidewalks, Stormwater, Utilities (Pipes, Plants, Distribution and Collection Systems) and a City owned Electric Utility; introduced the use of the City owned dark Fiber into the Wolf Branch Innovation District and the advantage of the City participation in a P3; Strong background in labor relations and collective bargaining; Emergency Management Leader; Public Safety Services to include Police and Fire Services; Reorganized the Parks, Recreation, and Library departments into a Leisure Services department with a focus on the community and programing; Budget experience to include funding of Capital Improvement Programs and general operating needs, as well as understanding revenue sources, full-service Municipal experience.

Key Achievements:

- Developed a future growth plan for the Wolf Branch Innovation District.
- Capital Improvement Bonds and Fire Assessment Bond Approval for future projects,
- Rating Agency – Received a rating of AA- from two agencies,
- Increase the General Fund Balance Reserve from 10% to 17%.
- Completed Phase I & II of the WiFi/Bandwidth/Fiber Connection in the Downtown and Extend into the Innovation District the opportunity for Infrastructure of Fiber for Commercial and Residential Use.
- Presented and Implemented Economic Development Tax Abatement Programs.
- Presented Parking Solutions for the Downtown section.
- FEMA funding – IRMA and Mathew (most recent storms),
- Grant funding with St Johns River Management and the City of Apopka – Interconnect of a Reuse Program
- Presented and Implemented Tree Inventory Report.
- Presented Parking Solutions for the Downtown of Mount Dora and surrounding areas of the City.
- SRF Projects – Utility Projects
- SAFER Grant – 12 Firefighters 2018

CITY OF OVIEDO, OVIEDO, Florida (2012 – September 2016) *Director of Management Services and Communications*

Management Services Director and Communications Director for the City - providing leadership and direction to/for all aspects of the annual budget process, city-wide Communication's, Strategic Development, Performance Measurement Program, Ten Year Capital Improvement Program, and Economic Development programs, which includes the Community Redevelopment Agency (CRA) district.

Since April 2013 I have served as the Acting City Manager in the City Manager's absence with oversight of 290 full-time employees and city operation's for the nearly 38,000 residents of the City of Oviedo.

Develop and implement the annual City-wide operating budget, as well as the Ten Year Capital budget. Revamped the budget system and implemented new budgeting processes and procedures. Through the budget process shifted organizational focus from "budgeting cheap/minimum service" to investing in the future and minimizing long-run costs. Recommend organization enhancements and restructuring as necessary.

Responsible for the management of the communication services offered through the city, assessing the public image and inquiries from the media, monitoring data that is being disbursed to the public, including social media outlets and responses. Social Media outlets include the website, Oviedo TV thru Bighthouse Networks, Facebook, and Twitter. Provide and assist the City Manager and the City Council with accurate and timely information to support decision-making and policy direction.

Interact with Boards and the City Council, outside governmental agencies and non-profits, constituent representative groups and other citizens groups relative to goals, actions, CRA board and businesses, and activities of the City.

Manage the Economic Development services, involvement in reviewing Impact Fees as they relate to the Economic Growth Sector, Incentive programs for potential medical and commercial businesses. Manage the Community Redevelopment Agency and oversee the contractor representing the City on the CRA Governing Board.

Other areas of oversight include: cutting edge customer analytics in financial services, statistical modeling, and key business plans. Provide guidance, conduct fiscal and programmatic analyses from a city wide perspective and provide alternatives and recommend solutions to the department directors, City Manager, and City Council.

Key Achievements:

- Instrumental in the financing, planning, and organization of opening the Cities premier land use in the CRA district referred to as Oviedo on the Park. A park for the citizens to enjoy with amenities such as: Cultural Center or Amphitheatre, Boat Dock and Swan Boats, Splash Pad, Playground, Open Grounds, Small Stage, Dog Park, and a Veteran's Memorial.
- Formulated the financial forecast used to estimate revenue while preparing and presenting an annual balanced budget of \$74 million.
- Initiated RFP for submissions for new "branding" for the city. Project continues with no consensus from the City Council.
- City-wide participation in the Florida Benchmarking Consortium performance program.
- Initiated and chaired a committee on a new merit-based pay system that rewards employee performance, as well as years of service and education.
- Recipient of the Government Finance Officers Association's (GFOA) Distinguished Budget Presentation Award for Fiscal Year 2011 - 2015.
- Initiated Social Media outlets for the City.
- Six Sigma - Yellow Belt Certified.

CITY OF WINTER GARDEN, Winter Garden, Florida (2008 – January 2012) *Director of Finance*

As Finance Director it was my responsibility to manage the daily and annual functions of a municipal Finance department, as well as Utility Billing/Collections and Customer Service. The City Finance department included Payroll, Accounts Payable, General Ledger Accounting, and Fixed Assets.

- Reviewed and implemented all Contracts with a financial impact, reviewed and posted request for proposals/qualifications, and approved all purchase orders.
- Managed and provided direct oversight of the Construction Improvement Projects and the 5-year CIP plan, balancing revenue and source of funds to the projected expenditures.
- Provided to the City Manager and the Governing body recommendation's on policies, budget inquiries, audit concerns (internal and external), debt, investments, and general information regarding financial issues.
- Prepared and recommended the city wide budget, reviewed expenditures and variances, and initiated corrective actions required to meet budgetary requirements.
- Completed proposal generation, fact-finding, updating, and standards with awareness to the key metrics, including developing the departmental goals and objectives, and city wide goals and objectives.
- Determined metrics and generally accepted standards based on ICMA and internal norms.
- Focused on complying with all federal, state and local legal requirements, studied existing and new legislation, enforced adherence to requirements, policies and procedures, filing financial reports, and advised management on current and future actions.
- Prepared the Annual Audit as reviewed by external auditors per GAAP, and performed all internal audits within the city, reviewing internal controls, policies, and procedures.
- Direction of the Utility's metering, billing, collections and customer service operations.
- Served as the Utility's primary spokesperson to consumer groups, industry associations and the media.

Key Achievements:

- Formulated the financial forecast used to estimate revenue while preparing and presenting an annual budget of \$51 million.
- Championed efforts to introduce change to management strategies, implement process improvements, and streamline daily business processes.
- Protected city assets by establishing credit policies, creating credit procedures, implementing internal/external audits, and enforcing internal controls within the Utility Billing department.
- Oversight of the Comprehensive Annual Financial Report (CAFR) and information to the City Commission on the External Auditor Findings and Unqualified Opinion.
- Implemented Six Sigma/Performance Management objectives based on the Strategic Initiatives adopted by the city.
- Recipient of the Government Finance Officers Association's (GFOA) Distinguished Budget Presentation Award for Fiscal Year 2010 and 2011 (first time submittal for the city was in FY 2008/2009 and received the award for the first time for FY 2009/2010).

CITY OF TITUSVILLE, Titusville, Florida (2002 – 2008)

Finance Manager – Collections, Billing, Customer Service, Budget Officer, CIP Manager

Managed and directed divisions within customer service, utility billing, finance, accounting, budgeting and purchasing.

- Managed the Collections and Billing Division within the Customer Service Department, which included reviewing accounts monthly, establishing payment plans with customers, meter data management and technology, customer service training.
- Prepared and presented the city annual budget to the Finance Director for review and presentation to the City Manager.
- Managed the capital improvement project financial program and schedules.
- Prepared and reviewed grant submittals, and purchase orders.

Key Achievements:

- Issued General Obligation Bonds, Series 2005 of over \$10 million to purchase property located on the Indian River for public use.
- Formulated and implemented a financial modeling system to evaluate multiple "what-if" scenarios, which reduced forecast and budget preparation time by 75%, boosted process accuracy, and improved staff awareness of actions needed to reach financial and performance management.

- Increased productivity 40% by implementing an automated financial reporting process that uploaded employee data needed for a budgetary report during the annual update.
- Gained specialized expertise in developing consensus for strategic planning among all stakeholders, which included monitoring processes and metrics, created financial models, and directing process mapping.
- Recipient of the Government Finance Officers Association's (GFOA) Distinguished Budget Presentation Award for Fiscal Year 2006 and 2007 (first time submittal for the City was in FY 2004/05).
- Federal Emergency Management Agency (FEMA) disaster preparedness and disaster recovery policy and procedures experience and certification.
- Prepared Bi-Annual Budgets each year beginning in FY2006.

Prior Employers:

Parrish Medical Center
School Board of Brevard County
EG&G Florida

EDUCATIONAL BACKGROUND

Bachelor of Science, Business Administration

University of Central Florida, Orlando, FL

PROFESSIONAL AFFILIATIONS

- ❖ Leadership Lake County - Class of 18 – Graduated May, 2018
- ❖ Leadership Seminole - Class of 25 – Graduated May, 2016
- ❖ International City/County Management Association - #000535650I
- ❖ Florida Government Finance Officers Association - #10961
- ❖ Government Finance Officers Association – since 2003

City Manager Pre-Interview Questionnaire
City of Palm Coast, Florida
Due NLT Monday, February 4th at 11:00 PM CST

Full Name (first, middle, last): Robin Renee Hayes _____

Nicknames (if any): _____

Please provide your cell, home, and office numbers to facilitate contacting you if needed.

Cell: _____

Home: _____

Please answer each of the following questions completely and thoroughly.

1. How many employees, and what size budgets did you oversee in your last three positions?

City of Mount Dora – FY 2016/2017 \$59,716,471 with 215.62 Full Time Equivalent (F.T.E.'s) positions; FY 2017/2018 \$61,830,076 with 243.03 F.T.E.'s; and FY 2018/2019 \$109,284,941 with 261.128 F.T.E.'s.

City of Oviedo – Total Budget \$71 million and 307.89 F.T.E.'s

City of Winter Garden - Total Budget \$61 million and 290 F.T.E.'s

2. Please detail the specific departments you have supervised in your last three positions.

City of Mount Dora – Administration; City Clerk; Economic Development; Electric Utility; Environmental Services (Storm Water); Finance (Customer Service/Billing & Collections, Purchasing, Accounts Payable/Accounts Receivable, and Payroll); Human Resources; Leisure Services (Parks, Recreation, and Library); Information Technology; Public Information Officer; Planning & Development (Building Official and Building Services); Public Safety (Police and Fire Services); Public Works (Roads & Streets, Facilities); and Utilities/Plant Operations.

City of Oviedo – Communications; Public Information Officer; Website Management; Budget Management and Strategic Development; and Administration. Served as the Acting City Manager when the City Manager was unavailable (Police, Fire, Utilities (Water/Wastewater/Stormwater); Finance; Human Resources; Parks & Recreation; and Planning & Development).

City of Winter Garden – Finance Department to include the following divisions: Utility Billing and Collections, Meter Reading, Accounts Payable/Accounts Receivable, Payroll, Purchasing.

3. Please explain why you left your last three positions.

I tendered my resignation as the Finance Manager/Budget Officer with the City of Titusville in 2008 to join the City of Winter Garden as the Finance Director. I then resigned from the City of Winter Garden to join the City of Oviedo in 2012 as the Management Services Director of Budgeting, Communications, and Strategic Planning. I left the City of Oviedo in 2016 so I could lead the City of Mount Dora as their City Manager, and I currently reside in that position.

4. Are there any gaps in excess of two weeks in your employment history? If so, please explain in detail.

In April 1994 I resigned after nearly 10 years with EG&G Florida to stay home with our kids, then ages 6, 4, and a new born. I went back to school in August 1994 and graduated from the University of Central Florida in 1998. I returned to the work force with the School Board of Brevard County in December 1996.

5. Please describe your experience and skills in strategic planning and visioning? How do you facilitate development of a clear vision for the organization and communicate that vision to all stakeholders?

I have been intimately involved with Strategic Planning and Metrics since 2003, when at the City of Titusville, I began demonstrating the connection between the Budget and Strategic Planning. At the City of Winter Garden, the City Manager encouraged and championed the Six-Sigma approach, spurring the Strategic Planning process to take place. I led the team and located a Facilitator who could engage the City Commission. The Facilitator and I worked to educate the City Commission and other Director's, setting the table for success. Once the Goals, Initiatives, and Metrics were established, the implementation plan was developed to include personnel and software.

Learning from the previous two City's, I arrived at the City of Oviedo and began individual meetings with the Mayor and Councilmembers, along with the City Manager. Engaging the City Council and becoming familiar with the current baseline was the advantage going forward. I began with work sessions and basically facilitated the Strategic Plan through a series of open dialog and community meetings. Open communication, drilling down into the proposals submitted by each member during the sessions helped, along with Citizen input. Each meeting started with a Summary of the last, discussing the outcomes and also restating the Goals which helped to affirm the Strategic Plan. Goals were agreed upon, then initiatives with the help of staff were developed, each initiative also needed a metric to determine success by the community, City Council, and staff. Finally, a reporting mechanism, as well as a schedule of updates to the community and the City Council were agreed upon. During the process of updating the City Council on the Strategic Plan there were occasions when they had to determine whether to remove an initiative due to it being completed or and a few occasions as to whether they would remove an initiative based on it no longer being "applicable" due to a change in operations.

City of Mount Dora – I began my career with the City on September 26, 2016, the City Council had their first ever Strategic Planning session in July 2016 at their request. This session was facilitated by Ms. Crotty with the University of Central Florida's Institute of

Government. During my first 30 days I reached out to Ms. Crotty and arranged for her return with a goal to see the City move forward with the Strategic Plan. I arranged the next meeting for December of 2016, with the purpose to review the previously discussed Goals and determine the top priorities for the City. The initial meeting lead to subsequent meetings in February, March, June, September, and December 2017. Ms. Crotty led the Strategic Planning Sessions in February and September to guide the process along and help the City Council understand the difference between "Goals" and "Initiatives". I led the planning session during the other months and also cross-walked the City Council through the process of relating metrics to each of the initiatives and defining success.

The Strategic Plan is the building block by which the City has not only developed the budget but built the foundation in which the future Growth will be evaluated, as well as the business plan which will provide direction to accomplish the goals and initiatives. It is our goal to see a growing and thriving City, one which prospers and reflects the beliefs of its people. The Strategic Plan is reviewed as a document quarterly and the accomplishments and metrics set to drive success are presented monthly.

I have attached the document I provided the City Council during our last work session on the Strategic Plan. Since the City annually has Council elections, I feel as though each time a new member joins the City Council the newly seated Council needs to re-affirm the Strategic Plan. It is also a good time to review the accomplishments of the past year and communicate the direction of the future according to the plan.

6. What do you feel are your greatest strengths as a leader and manager?

I listen to the City Council, the public, and staff, communication is vital, as well as, a passion for your career. I also believe I possess the characteristics which help in being a good manager, integrity and ethical values are at the top of my list, honesty, loyalty, dedication, fairness, and trust. I am involved in the community with our Civic partners, non-for-profits, HOA's, Government agencies, as well as other organizations, placing partnership high on the list of strengths. I lead by "setting an example" I am involved in the festival's and other City functions, showing up to help at the onset not when all the work has been completed. I work hard each day to be the best I can be, I also believe it is important to "own" my decisions, not only with the City Council, the Community, but also with the Employee's. Confident in the staff and their expertise in order to reach out to each of them for information and to provide credit where credit is due.

7. What is the most complex project you have coordinated? Describe the steps you took to ensure political, organizational, and community support for the initiative, highlighting specific challenges you faced, and how you overcame them to successfully implement the project.

In July 2017 I reached out to the City's Financial Advisor after working with the City Council the last several months in relation to the City's Capital Improvement Program. The City Council approved the construction of a Public Works Facility, the Capital Improvement Project worksheet having been submitted as part of the FY 2016/17 budget originally. The

CIP was on the agenda at multiple work sessions during the first quarter of 2017, and also in June and July 2017. After much discussion the item was carried forward into FY 2017/18 with presentations from the Engineering firm on contract in May 2018, along with a revised cost estimate. The engineering firm provided a cost estimate of \$12.8 million to build the facility on land we already owned and using a design provided to them by one of the City's engineers. I would say this was a wake-up call for all! The fund source was identified as "debt", but there had not been a determination of what type of debt.

Additionally, there were several other projects totaling just under \$10 million to include expanding the City Hall Building and construction of a Parking Garage. Between the three projects, the total Capital Improvement funding request was around \$22 million.

The City engaged in a contract with Fitch Associates requesting an analysis of the Fire Department's processes and provide an assessment to include facility opportunities. The report was presented to the City Council in December 2017, the report provided direction to the City to assist in obtaining accreditation. Recognizing there was a need to improve the ISO rating from a 2-3 to a "1" by building three (3) new Fire Stations within the City limits, in order to meet the response time to a scene of 4-5 minutes. The City Council knew one of the two Fire Stations currently in operation needed to be replaced, it was erected 12 years ago and the building was meant to be temporary, hence why it is a modular facility, only meant to last 3-5 years. In order to educate the City Council and the public, I added the Fire Station discussion on every work session. The City enacted the Fire Assessment Fee for Capital Purchases for two fire truck three years ago, the fire assessment fee was due to expire. Now the opportunity existed to use similar funding for the fire stations, capital purchases, and future positions.

I placed the Fire Station discussion on every work session, bringing in the contractor from time to time to explain how the funding of the fire assessment fee would be applied to build three facilities and also the methodology to determine the collection process. The education process was not only for the City Council but also for the citizens. If the City Council approved the funding source as the Fire Assessment Fee the annual rate would increase substantially. The Fire Assessment Fee was collected as part of the Tax Collection process by the County and on the TRIM notice. The Fire Stations based on others recently built in the State varied in cost to construct between \$3.8 million and \$8 million. The total estimate for the City is \$22 million for the Fire Stations and equipment.

During the summer of 2018 I also proposed purchasing several pieces of property in the Historic part of downtown in order to construct some surface parking lots. The CIP cost for the land and construction was estimated at \$4 million dollars.

The challenge was to present the facts to the City Council and to the public, so when the public meetings occurred all the answers to questions had been considered, with a focus on being transparent. Between all the projects the City would spend approximately \$48 million for its Capital Improvement Program, even with creative funding this was a large amount of money to spend on several programs, especially since the City did not have any open debt outside of its Utility Funds and one refinancing due to be paid-off in 2019. The City Council approved all the funding initially in July, August and at the first and final

budget hearings. After a review of the projects and addressing the construction of a parking garage, I reduced the \$22 million to \$12.8 million in Capital Improvement Bonds to cover the Public Works Facility only. The City Council approved a short-term bank loan for the surface parking and property of \$4 million, these properties are located within the Community Redevelopment Agency area and will be paid in most part by cash available for such purposes. The final piece of the puzzle will be the construction of the Fire Stations, the City Council agreed to fund the stations using Fire Assessment Fees, there were several issues and the City Council struggled with increasing the current fire assessment fee from \$50 per homesteaded household to \$269 annually per homesteaded household. There were approximately 12 citizens who spoke out against the fee increase, and approximately 5 emails expressing their disapproval of the increase. Going forward I will be presenting the City Council a hardship option in case some of the citizens in the City qualify for assistance or relieve of the Fire Assessment fees.

Also, as part of this process the City had to go before the rating agencies and establish a credit rating. The total process was quite extensive and at times difficult to gage whether I had provided enough data for the City Council to make a very difficult policy decision.

8. Please describe your experience in overseeing the following operations: Water Treatment & Distribution, Wastewater Collection & Treatment, Municipal Stormwater, Street & Traffic Control, and Public Safety (Police & Fire).

City Manager with the City of Mount Dora since September 2016, Utilities include Water Treatment and Distribution, as well as, Wastewater Collection and Treatment. There are two Water Treatment Plants and two Wastewater Treatment Plants and Collections. Experience with managing the Capacity Use Permit (CUP) issued by St. John's River Water Management District (SJRWMD) dealing with treatment capacity, current system has a capacity of approximately 4.9 million gallons per day (MGD). Managed the metering department for more than 13,000 accounts and very familiar with installation of new meters, as well as the Financial Collection piece of owning a Utility with a User Fee established for services rendered. Service includes more than 1000 fire hydrants, more than 100 miles of water mains and just over the same in sewer mains. Intimately involved in submission and management of State Revolving Funds (SRF) loans and grants issued by the State of Florida through varied agencies. Extensive experience in Water Plant Modifications and updates, boil water notices as well as the Florida reporting requirements with DEP if the testing indicates a minimum concern. Annual reporting to the DEP on water quality, and reporting to the State and Federal Government on the water at the Wastewater Treatment Plants. Familiar with our lift stations and the requirements to replace and repair and present to the City Council the need to allocate funds for operations issues, R&R (Renewal and Replacement), and line cleaning (use of the Vacuum truck to assist with solids being removed). Familiar with SCADA controls and reporting and the need for automated systems. Working to develop an interconnect with another local City to purchase their Reuse excess and pipe to several residential developments, needing additional capacity for irrigation.

Stormwater run-off and monitoring of the drains and ponds and the filtration to the aquifer represent a small piece of this Utility System. Legal requirements for the NPDES permits and the surface water requirements, as well as the long-term goals of effective stormwater management are vital. Without the stormwater collection drains the City's would see more flooding and pollutants could enter our lakes, ponds, and waterways. Challenges with stormwater drains include undersized drains mainly due to when they were installed and growth in number of homes serviced. The stormwater systems or pipes are no longer adequate, to correct the problem not only will new infrastructure need to be installed, but also new roads/streets, curbing, and driveways, etc. since now homes exist where at one time they did not, creating an ongoing challenge.

Street & Traffic Control exist as part of other departments, such as Public Works for Streets; and Traffic Control is within the parameters of Policing Services. Street Maintenance is critical to safe streets, just to mention a few of the issues to be aware of when managing this program, address pot holes and repair properly, stripping visible for safe operation of vehicles on the streets, and adequate lighting of the area. Traffic Control needed during an event at the appropriate locations, street lights working properly to assist with movement of vehicles through an area, speed limits set as per residential or commercial uses and traffic patterns, as well as the use of School Crossing Guards at intersections for safety.

Police and Fire Services are fairly similar at all City's and I have had the pleasure of working with both units at four different City's. For the most part, the management structure employed at each is the para-military command. Also, most of these organizations are represented by collective bargaining units, therefore the rules and regulations are fairly detailed and straight forward. The officers/firefighters that work in these two departments tend to follow the "chain of command" and they are led by their Chief, then the City Manager. These men and women like all employees in general, work hard to support the City and put their lives on the line, at the end of the day they want to be respected for the work they perform. Challenges for these organizations include shifts, promotions, the tools to perform their jobs, vehicles, accreditation, ratings as in the ISO for the Fire Department, and training. Keeping the City safe and providing protection at the highest level is paramount to the City and the Citizens.

9. Please describe your experience and skills in municipal financial management, budget development, and capital infrastructure planning, maintenance, and financing. In your response, please highlight any related creative financing strategies you have used to address CIP infrastructure shortfalls.

I have extensive experience in not only creating a Budget for Cities but also experience with Audit's and the CAFR. Each of the Budget's I have had the pleasure to be involved in have also had extensive Capital Improvement Plans or Programs. I have created CIP and Capital Outlay programs from the simplistic point of establishing the process of submitting the request to include the quote to substantiate the request and also as to how to decide on the source of funding from a revenue point of view. CIP programs to include Capital Outlay may include a component in which the requestor must justify the

request, including a Return-on-Investment (ROI) analysis, a cost-benefit analysis, as well as solution if the funding is not available.

Operating or general department use is budgeted and discussed during the budget work sessions, along with full-time equivalency data. Data analysis and Metrics are presented as to why the items are included in the budget. Revenues or Source of funds are also included during the budget work session meetings. Part of the Operating process includes Replace and Renewal of Utility Systems, Vehicles, Computers, and overall maintenance of the facilities. Extensive experience with Enterprise and Internal Service Funds, as well as Special Revenue Funds. I have issued RFQ's, and RFP's for the Financial Advisor's, Utility Rate Studies, Impact Fee Studies, and various other types of financial reporting documentation.

This past year I went with the City's Financial Advisor to New York and met with all three rating agencies, with a goal of seeing the City with an established Rating for future bonds. Types of bonds varied from capital improvement bonds to fire assessment fee structured bonds. The process was successful, we received overall a rating of AA- and A3 on the fire assessment fee bond since it is treated similar to a General Obligation Bond due to the security of the way the funds are collected and assessed.

10. Please describe any experience you may have in assisting your community/organization in advancing voter-referendums to consider financing of proposed municipal capital projects and/or community initiatives? In your response, also indicate the results of any such referendums, including any lessons learned that you would apply in future referendums.

Referendum to build a Police Station. The key to a referendum is education, the statute allows Cities to educate the public as long as there is no directional input as to how to vote. Informing the Citizens as to the reason and also explaining the process is the largest obstacle. Hiring the right consultant to provide the correct type of promotional educational material and also provide metrics to the City Council as to where, when, and how the materials were deployed, and then after the vote, providing more analytics as to the why the vote went the way it did. The referendum in which I was involved was approved and the Police Station is in the engineering and design/build process.

11. Please describe your experience with collective bargaining and labor relations, highlighting the types of bargaining groups you have worked with and tell us about any particularly innovative provisions/programs you may have incorporated in previous collective bargaining agreements?

I have been part of the negotiating team for two cities, currently with the City and the FOP or the Florida State Lodge Fraternal Order of Police; the Professional Firefighters of Mount Dora - IAFF- International Association Fire Fighters; and General Employees of whom have been part of the FOP or the Florida State Lodge Fraternal Order of Police for many years. The new agreement included some language stipulating new hires could not make a higher rate of pay as current employees still on probation and already on board

with the City Police Department. Added language for the Fire Department stating you could only test for a promotion if you were in good standing with the department. All three bargaining agreements include the provision paying for annual stipends to individuals to be paid during the first pay period of December annually.

12. Please describe your philosophy and approach to building a strong team environment and motivating your employees to perform at their highest levels.

Respect for each member and their knowledge of their discipline. I look for members who are interested in the City, the discipline they represent, and teamwork. If someone is only worried about their department they will not look out for the bigger team or the City overall. I am direct and honest with employees and I expect the same, I have a good feel when you fit in with the organization and the leaders on-board.

13. How do you facilitate open and transparent communication with the Mayor & City Council, staff, residents, and other stakeholders?

I established weekly standing meetings with the Mayor and the City Council members beginning the first week of tenure as the City Manager. Actually it began after I accepted the position, I met with each member in the 45 days prior to beginning work so as to get to know their concerns and also to become familiar with the City and the issues in which the City Council viewed as their first priorities. I review items of interest during the weekly meetings and also the agenda for the next meeting, providing an overview of each item, I gather any questions they may have and then I follow-up with them. I send emails and updates or information during the week and also call them if I feel as though there could be an issue which may need their immediate attention. I provide information to the City Council via each agenda item, therefore the community can review all the information the City Council is provided. I also speak at several Community functions (Rotary, Women's Club, Kiwanis, HOA's or Community Organizations, Chamber, County and any other event in which I am invited). The Mayor is the spokesperson for the City, so I work closely with him to determine who will present or if a team approach. Providing information and a well written memo so the public can view it in advance of the City Council meeting has been the best way to communicate with the residents and also some of our stakeholders. I also meet with various stakeholders in reference to Development, the Wolf Branch Innovation District, or even on programs in which the schools wish to implement.

14. Palm Coast desires to be recognized as a community that encourages development consistent with its evolving vision from a largely residential planned community to a more diverse, mixed-use, residential, commercial, high-tech, and high-skill business center to diversify the City's tax base. Please tell us about any innovative strategies that you have used in your current or previous posts that successfully resulted in increased economic development, including providing some notable examples.

Identify or interview consultants, asking for input, looking for similar challenges, as to how to resolve the challenges, and then looking at their successes and missed successes. Involving the right experts from the start and listening to their comments, marrying the

input to the expectations of the City Council and the Community. Developing a plan with a reasonable implementation to include the diversification aspects expected and making sure your land development code language supports your plan. Knowing the direction of the project and verifying the project can support the direction is crucial to success, sustainability is the key. Advertising and promoting the area in a way to attract the right businesses, ad valorem tax programs can assist if a company is competing in similar Cities for a particular business, providing adjustment to the impact fees or a credit for the developer/builder of fees.

The Duke Energy Site Certification Study afforded the City the opportunity to view the property located in the Innovation District from the 50,000-foot prospective. The Study determined if loading or unloading of vehicles or trucks made sense, looked at the egress and ingress of the potential roads still to be built, and assessed whether the local job market could support specific types of jobs in the Life Sciences, Manufacturing, Industrial or a series of other specialties. Understanding the market and where you sit in that market is important, defining the industry and then trying to find some small wins as to bringing the right corporations or businesses to fill the niche's, one business at a time.

15. Please tell us about any notable intergovernmental partnership(s) you have developed or played a significant part in their implementation. As part of your answer, highlight any significant challenges that you had to overcome to help make the partnership(s) successful.

The City of Mount Dora recently partnered with not only SJRWMD but the City of Apopka to Interconnect the Reclaimed Water Lines. The City received funding from SJRWMD toward a partnership and both Cities have developed a relationship. The City of Mount Dora will build the interconnecting system and will purchase Reclaimed or Reuse water from Apopka and transfer the water to the subdivisions where there is a need for additional water in which to irrigate. Future plans will include an interconnection for potable water, since the City of Mount Dora has a large CUP and the City of Apopka may based on high volume usage at peak times need potable water. Some of the challenges include issuance of permits and agreements, since we are also in two different Counties, so MOU's and agreements have had to be updated to not only keep everyone informed but also to meet all liability and legal issues.

The City has partnered with Lake County on many projects over the years, currently we are partnering to improve the infrastructure of both the City and the County. The City has a Joint Planning Agreement (JPA) with the County and therefore several projects fall within the agreement, to include roads, utilities, and services. The City has been a financial partner and the County has been willing to write the grant request to the State for funding and the County has been the recipient of the state appropriations due to the roadway being a County Road.

16. What steps and/or processes have you used to track the performance of your organizations? Please include any specific examples involving performance metrics, and how you have communicated organizational efficiencies to the public and/or employees.

Florida Benchmark Consortium (FBC) involved since 2012 with this organization, but overall involved with metrics since 1996.

17. Palm Coast currently operates FiberNet, a municipal high-speed fiber-optic backbone that connects City sites and facilities. The City's economic development goals include the attraction of dynamic, high-paying technology jobs, bolstered by the enhancement of its fiber network, ideally with the assistance of a new public-private partnership (P3) to help leverage its assets. Please tell us about any municipal fiber experience you may have, as well as any P3 projects you or your organization(s) may have been involved with, highlighting your particular contributions to the development and/or maintenance of such partnerships.

I have dark fiber now and our goal is to install the conduit as we install new pipes in the Wolf Branch Innovation District and then run the fiber once the commercial businesses begin construction. We have had six different contractors provide options in which the City could install and provide fiber to the commercial and residential customers in the future. The City is looking into P3 - private/public partnerships due to the type of utility service fiber is considered, meaning we as a City can't sell the fiber directly, but must go through a third party based on the service expected and provided. The City has expressed and received interest in partnering with a private corporation, also with a corporation which will assist in the capital portion and establish the service and then share in profits.

18. When we conduct a comprehensive background investigation and reference checks, what will we find that may warrant explanation or that could be of concern to the City of Palm Coast?

There is a Robin Hayes in the North Carolina legislative and several others in other positions in several other states – no relation.

19. What will we find in an internet search of press coverage that may be controversial or of concern to the City of Palm Coast? Please provide whatever explanation you think is appropriate to help us understand what we will find.

Same as number 18. I am sure the City Council meetings in which I have participated will display different quotes and input. No controversial items.

20. Are you currently involved in any other searches and what is your status in those searches?

No

21. Please provide a full description of your current compensation and benefits package and your desired compensation and benefits package if you were selected for this position.

- Annual Salary – \$157,423
- Annual Merit based on performance review
- Premium Term Life Insurance at Twice annual base salary
- Vacation credited with 10 days initial and 10 days annually
- Sick accrual based on City policy for City Employees

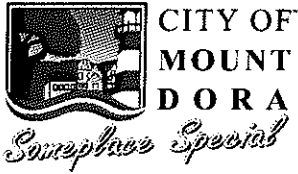
- Vehicle allowance of \$500 and increase per CPI
- Cell phone
- Retirement – 401A plan administered by ICMA-RC contribution rate of 15% of manager's base pay

22. If you were selected and offered an acceptable compensation package, what concerns or hesitations do you have that would have to be resolved before you would be ready to accept the position as the next Palm Coast City Manager?

I would need to provide the current employer at least a 30-day notice as per contract and it may be more toward of a 60-day notice. The timing of the resignation coincides with the beginning of the Budget Process, adequate time to allow for an Interim City Manager would need to be considered.

23. What are the three most important questions you have for Palm Coast Mayor & City Council?

- A. What obstacles and/or improvements do you believe will affect the FY 2019/20 budget cycle which will cause you to rethink the Strategic Action Plan?
- B. With the Innovation area and the future of the Fiber P3 program, what foreseeable challenges in educating the business community do you expect, and will there be an expected residential benefit due to the implementation of the program?
- C. Have you updated the Purchasing Policy to include the allowance of a P3 private/public partnership, and do you believe the private cooperation or business will need to compile to Municipal and State since there is an established partnership of sorts?



CITY OF MOUNT DORA STRATEGIC PLAN FISCAL YEAR 2017-18 ACCOMPLISHMENTS

Economic Development

- ✓ Created an Economic Development Plan
- ✓ Plan future growth of the Wolf Branch Innovation District
- ✓ Extended two-year no-cost to annex for the Wolf Branch Innovation District
- ✓ Established Special Events Standards and Fees
- ✓ Completed Phases I & II of WiFi/Bandwidth//Fiber Connection in Downtown CRA
- ✓ Entered into a negotiated territorial agreement for the JPA area with the County
- ✓ Hired Economic Development Manager
- ✓ Job sharing a position between Economic Development and City Clerk a new position to coordinate and support the Economic Development Manager
- ✓ Council approved several economic tax abatement programs, as well as several façade improvement programs
- ✓ Council approved the implementation of an Entertainment District within the Historic Downtown area
- ✓ Reviewed the current charter and uncovered definition of short-term rental allowances and staff defined a process to register such businesses
- ✓ Grandview plan as presented by RMA to expand commercial and residential in the NorthEast CRA.

Infrastructure

- ✓ Developed a Report on the Parking Lots, Sidewalks, and Streetscape Requirements
- ✓ Obtained CDBG grant for the Northeast CRA Stormwater Improvements
- ✓ Presented E-Sciences Tree Inventory Report
- ✓ Completed Lighting/Lamp Upgrades in Downtown CRA
- ✓ Constructed Library Butterfly Garden
- ✓ Relocated Enterprise Departments to the remodeled City Hall Annex to cohabit with Parks & Recreation
- ✓ Applied for State Revolving Funds for several utility projects

Fiscal (Resources)

- ✓ Increased the General Fund Balance Reserve from 10% to 17%
- ✓ Council approved the following updated fiscal policies:
 - FY 2018-19 Fee Schedule
 - Purchasing Policy Annual Revision
 - Library Donations Policy
 - Fund Balance Policy
 - Investment Policy
 - Various other policies
- ✓ Created new budget format in 2017-18 and 2018-19

- ✓ Re-evaluated the debt for the future due to the costs of the Public Works Facility
- ✓ Completed ratings process and received ratings from Fitch and S&P
- ✓ Obtained \$12MM Capital Improvement Bonds for construction of Parking Lots and Public Works Facility
- ✓ Obtained \$22MM Fire Assessment Bonds for construction of three Fire Stations
- ✓ Completed the Electric Rate Study and implemented rates, resulting insavings to customers
- ✓ In November 2018, Council hired a new City Attorney, who was appointed to succeed prior legal counsel in August 2018
- ✓ Completed audit with new auditors; closed the forensic audit that was opened in 2017; and addressed management comments
- ✓ Obtained SAFER grant, which partially funds the salaries of 12 new firefighters over 3 years
- ✓ Police Department sponsored student leadership program in partnership with the Chamber

Growth Management

- ✓ Enacted the following updated growth management policies:
 - FY 2018-19 Fee Schedule
 - Naming or Renaming of City Streets and Facilities
- ✓ Completed Phases I & II of the Wi-Fi Plan for the Downtown/Highland Corridor
- ✓ Completed purchase of Gobie property for potential parking in the Downtown/Highland CRA
- ✓ Delivered a Letter of Intent for proposed purchase of property on Limit Avenue for the construction of the Public Works Facility
- ✓ Delivered a Letter of Intent for proposed purchase of property on Baker Street for future expansion in the Downtown/Highland CRA
- ✓ Delivered a Letter of Intent for proposed purchase of property on Limit Avenue for a Recreation Facility
- ✓ Enacted 4-hour time limit parking in the Downtown/Highland CRA
- ✓ Entered into a sponsorship agreement with a third party to provide shuttle service in the Downtown/Highland CRA
- ✓ Created and implemented Summer Camp program through partnership with Round Lake Charter School
- ✓ Created and implemented After-School programming through partnership with Round Lake Charter School
- ✓ Relocated IT Department to City Hall
- ✓ Reorganized Customer Service within the Finance Department and promoted Supervisor from within; hired two part-time Customer Service Representatives to assist

Public Safety

- ✓ Accepted the Fitch Report on the Wellness of the Fire Department
- ✓ Developed a Strategic Plan in the Fire Department based on the Fitch Report
- ✓ Added 5 new police officers in FY17-18 and 2 new School Resource Officers (SROs) in FY18-19
- ✓ Recruited, hired, trained, and onboarded 12 new firefighters funded by the SAFER grant
- ✓ Added an officer in the Downtown CRA
- ✓ Reduced property insurance rates (ISO) in partnership with the Fire Department
- ✓ Installed cameras in parks and facilities as needed
- ✓ UCR Crime Rate is down 4%

Inwork

Future

Develop a Master Plan for the Parks & Recreation Programs

Develop a WiFi/Bandwidth/Fiber Connection in the Downtown CRA. Phase III

Planning Special Events

JPA contract with County

Develop Master Mobility Plan (Traffic Management) as part of EAR/Comp Plan

Revise Impact Fees to include potential Mobility Fee

Contract with Dr. Richard Levey (beginning May 2017) to lead planning and development in Wolf Branch Innovation District - partnership with Lake

Work with PRMG to review all impact fees and make appropriate recommendations on future changes to the impact fee program

Design of Public Works Facility

Recreation Master Plan; 80% complete - Current Parks, Future Parks, Trail for Bicycling and 10-Minute Walkability, Passive and Interactive Activities, presented by consultant at most recent meeting

Design a Public Works Building - in design

Upgrade current facilities by maintaining preventive maintenance programs

Apply for the Stormwater In the North East CRA through a grant from CDBG and from the board

Design Stormwater Improvements in the North East CRA

Construction At-Risk Manager for Public Works Facility Build

Construction At-Risk Manager for Fire Stations Build

Identify location for Future Parking Lots in Downtown

Identify no more than three sites for future Fire Stations. (Potential to use City property or one site.)

Identify additional property on Limit Avenue for construction of Public Works Facility

Identify Post Office property for use as a Public Parking Facility

Identify available property for possible office space as well as property allows for analysis of use needs to be determined

Interconnect

Identify County/City water/wastewater piping

Identify design process with FDOT/County/City - Roadway system

Mountain Restoration - The stormwater system failed during Hurricane Ike, washing out the roadway and bleeding into Lake John and creating lift station

Develop a Master Mobility Plan - Traffic Management

Develop a WiFi/Bandwidth/Fiber Connection for the future commercial and residential at Wolf Branch Innovation District

Council Presentation of Special Events - March 2019

Purchase of land and construction of parks & recreation general purpose building

Plan & Develop Trail System - Wekiva

Plan & Develop Trail System - TavDora

Develop a Master Plan for Infrastructure to incorporate maintenance and future growth

Develop a Master Plan for Stormwater

SR 441 and SR 44 enhancements

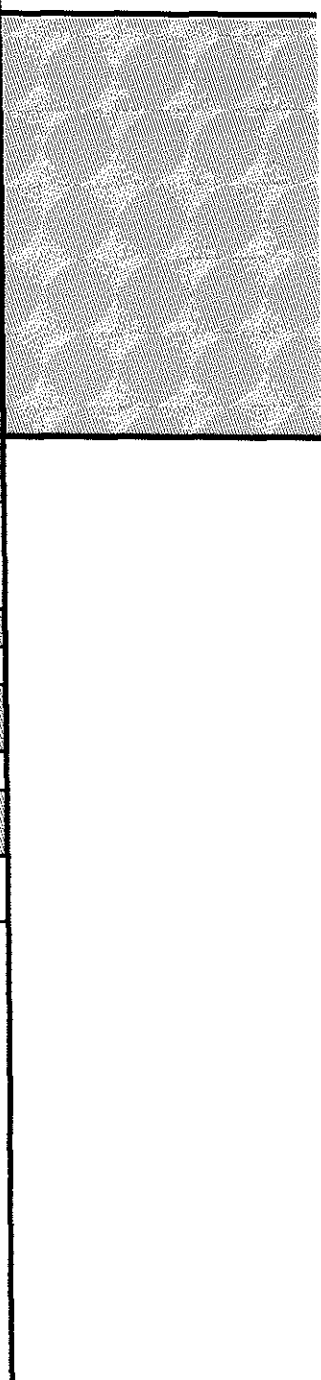
Construction of new Public Works Facility

Fire Assessment implementation of ISO Build of 3 new Fire Stations

Develop a Utility Master Plan to include Wolf Branch Innovation District

Remodeling of Public Safety Facility to a Police Department Facility as part of Capital Improvement Bond definition - future bond sale

Develop and implement an efficient sewer and reclaimed water system outside the interior city limits



Inwork	Future	
Avenue Pool Resurfacing	Replicate Budget Process and Reports / Focus on improving CIP documentation	
Paving of Library Parking Lot	Prepare sale of future bonds secured within the Capital Improvement bonding process to fund remodeling of Public Safety Facility (available bond funding)	
Job Program (NorthEast CRA) with CareerSource		
Job Program (Library) with CareerSource		
Sponsored Internship Program with a vocational and/or state college		
Outreach Program with Legislature to include Mount Dora High School, Mount		
Christian Academy and Homeschool students		
Lease Property: Finalize contract for lease/purchase of property for		
Downtown Parking		
Lease Property: Continue to negotiate with owners for future purchase of		
/		
Termination of the Mount Dora Golf Association contract		
Allocate CRA budgeted funds for purchase of property for a future parks &		
and on general purpose facility		
Implement cloud-based fiscal asset system for vehicles, mobile equipment and		
- Geotab		
Implement bar-coding system within the warehouse/inventory structure - WASP		
Recruit key personnel, such as Finance Director and newly-created position for+ IT		
Contracted with PRMG for a Utility (Water & Sewer) Rate Study - ongoing		
Contracted with PRMG to determine an allocation method for all enterprise funds		
and special revenue funds to general fund		
Developing a WiFi Plan for the Downtown/Highland Corridor - Phase IIIA	Develop a Building Master Plan for Infrastructure to incorporate maintenance and future growth	Valet Parking and Buses/Shuttle Council; Council denied prop
Contract to research/engineer and present options for surface parking lots in	Ask State Legislature to consider making Golden Triangle area a CRA to address	
Downtown CRA	blight	
Options to acquire additional properties for parking in Downtown CRA	Purchase of additional property for City Hall renovations and parking lot	
Develop a regional transportation network - County new Impact Fees and definition of	Trail lighting/mobility	
vs. transportation		
Termination of the Highland Tennis Courts through a State grant process and County		
dollars - add 4 tennis courts, 16 pickleball, concession and restrooms		
and an EAR		
National Accreditation for the Fire Department	Purchase property and build new Fire Station(s)	
Develop Public Safety Plan for deployment and implementation of the City's future	Goal in the Fire Department of a six (6) minute response time to an incident	
Fitch Report		
Install cameras in parks and facilities as needed	Pedestrian safety at 441 and other major intersections	
	Place into service an additional fire apparatus ladder truck through the use of the SAFER personnel	

First Year Game Plan
City of Palm Coast
Robin R. Hayes

Upon contractual agreement with the City Council of Palm Coast I would arrange for an initial meeting with each of the Legislative members. These meetings are outside the realm of the First Year Game Plan. The intent of the meetings will be to clarify each member's priorities, their interpretation of the Strategic Action Plan, their viewpoint on the future of the City, first priorities of the new City Manager, expectations as set forth by the Council for the City Manager in general, and input on general policy needs.

First 30 Days:

During the first week I would like to take a Tour of the City and City Facilities with each Legislative member individually. This process will allow me to hear and see what each member feels is important, providing a voice to their concerns, which will better enable me to see projects or issues from their perspective during the initial 30 days.

Tour the Parks and Recreation facilities, Conservation areas, as well as visually seeing the focus area or areas where blending the "city of parks and trails" to create the framework area would be beneficial. Based on the Strategic Action Plan there are several Objectives/Strategies in which could be underway, viewing each in comparison to the Master Plan will be a starting point.

The Parks & Recreation Director, Utility Director, Fire Chief, and the Public Works Director to provide a tour and a description of each of the properties they manage, indicate future improvements or maintenance issues as we tour the site. Inspect the Public Works facility and review the City Councils plan for replacing/renovating the facility.

Establish a weekly standing meeting with each Councilmember to discuss the Council's concerns or questions in reference to the agenda. During this meeting time period I have the opportunity to listen to individual concerns, answer questions on items which are not part of the Agenda process and also provide overall information on things of interest.

Establish a weekly Executive Staff meeting to review the status of current projects/programs and personnel. The weekly meeting will provide all directors information in reference to those items of concerns at the department level, keeping everyone involved and informed.

Meet the employees during an open house, then each month thereafter I will attend two departments and attend their staff meeting. This allows me to meet each of the employees in their work space and in their comfort zone.

Meet with the Directors and Senior Staff members enable each member to addressed departmental concerns, also what do they expect from the City Manager. Communicate my expectations, department goals, performance measures as to Department Directors, and direction for the next 30 days and going forward.

Review the Interlocal County/City Agreement for Policing/Public Safety Services with Sheriff Staly. If Sheriff Staly has time, tour the City for areas of concern from his perspective, outline how the City can assist in removing obstacles that may contribute to crime. Create a report to serve as a baseline to use when developing the performance measures for the service provided. Review other services, like the

SRO's and support during an event, the requirements, notifications and IAP's (who own's them and provides the data) response, assuming the Fire Department is also part of the process.

Meet with the City Attorney Reischmann to discuss open claims, litigation pending, and current legal issues facing the City. Discuss the process of agenda review and how to remain consistent, and on time. Discuss the City Attorney's involvement with the Budget process, writing Resolutions and/or Ordinances. Discuss the City Charter and what future challenges does he see with the current charter, is there a requirement to update it every so many years, or never? I could not find the City Charter online- so I would also promote placing it on the website for the Citizens to review as needed.

Reach out to the non-profit organizations and Community groups within the City, such as: the local Chamber, Business Assistance Center, Rotary, Kiwanis, Habitat for Humanity, Elks, Knights of Columbus, American Legion, etc. and schedule a meet and greet with each one. Find out what we can do for each organization and the needs of the community. Schedule a "meet and greet" with the community through HOA's or other organized community groups, providing them an outline of the next several months, find out their needs, ask the questions on their minds, as well as, "What do we need to improve upon and What is working well"?

Evaluate the Strategic Action Plan with the Department Directors/Senior Staff as to their interpretation of the role they play in accomplishing each Goal. Provide a white paper on the challenges facing each department, what is needed to accomplish each Goal and how to overcome impediments. Since I could not find the performance measures established for each Goal or Objective, I assume they will need to be defined. It is difficult to demonstrate accomplishments if the outcomes have not been determined, you are reaching for the stars with no indication of how far to reach.

Re-affirm the Strategic Action Plan with the City Council, present completed Strategies or Objective for each of the Goals. Provide update on the open Strategies/Objectives, updating the public using the website to publish accomplishments.

Review the Financials with Ms. Alves the Finance Director, starting with the current year CAFR, expected to be underway and close to finalization. Review the City's position on debt, pension information, insurance pool, and fund balance for each governmental fund, as well as the cash balance in the enterprise funds and the MD&A and Financial Notes. Update the City Council with this information along with submitting the CAFR to the GFOA, if it has been submitted then I will make sure the City Council is provided the Financial Status of the City.

Review the Financial Policies in place for Investments, Debt Coverage for each Fund, Fund Balance Requirements. as well as, Cash Balance Policies, Transfer policies, and other relevant policies. Develop a plan to correct potential policy violations or language.

Review the Current Year 2018-19 Budget and make sure the Mid-Year Review is performed and presented to the City Council. Discuss options to correct any discrepancies, review performance measures making sure the metrics are consistent and align with the expectations as set-forth in the Strategic Action Plan.

Review the FY 2019-20 Budget, sit with Mr. Falgout and each Director and review their operating budget request, to include position control. Review with the team the Capital Outlay (CO)request and all the Capital Improvement Projects (CIP). Align the request for CIP and CO with the proper fund source. Review the Liability and Health Insurance plans, worker's compensation, pension, debt, interfund transfers, and investments. Using the Budget Calendar make sure the City Council work sessions/shops

have been scheduled and determine the types of working schedules to provide the Council for effectively communicating the budget.

Meet with the Fire Department and other department directors to review the EOC plan. Make sure a plan is in place for the City to be able to respond to a natural disaster or hurricane. Evaluate the plan, make sure all players know their role, update the website with a recent training if available. Make sure all contracts for debris removal and monitoring are current and valid, bid an emergency contract with an allowance of up to \$2,000,000 (this will allow for repair to a facility, road or other infrastructure immediately). FEMA requires all contracts have been properly bid, check the purchasing policy to make sure it was followed. NIMS training is required by all involved in the recovery, training plan should validate compliance. Finance needs to make sure all files are ready and the 214's are available and the current staff understands how to fill out the forms. City Council needs to be informed as to the Charter and Purchasing Policy requirements, making sure Resolutions or other legal documents have been issued and approved by the City Council to allow the City to operate efficiently under the City Manager/Mayor as appropriate for operations. Policies need to be reviewed to include a pay policy, FEMA will require documentation.

Status on the Public Works building and also an update on the Stormwater plan recently put into effect. A timeline with Cost estimates and Task to be completed. A project meeting with the Engineering firms on record, along with staff for both the Public Works Building and the Stormwater projects.

Establish a workplan for the Innovation District based on the Strategic Action Plan, along with Economic Development Master Plans. Review the Innovation Kick Start Program and the Opportunity Zone. Develop initiatives to move the City beyond the initial 17% developed threshold in which it currently sits, establish the next threshold minimums, set timelines for each initiative based on sector information and normal Economic Growth patterns for similar areas. Wynn Newingham should be well versed and she should be able to use local economic data from similar communities and with similar programs to assist in developing the initiatives.

Assess the Fiber and connectivity in the City, bring in Magellan and review the Master Plan. If other options need to be considered, develop a plan and discuss with the City Council. Look for opportunities to not only improve by also to develop initiatives that are not just meeting the minimum requirements, but exceed the requirements. Will the City extend the fiber to the rural areas for consumption, if so, then has the City engaged a third-party provider to sell the service? Keep legal involved since there are statutes preventing City's from being a service provider. There are several opportunities to receive funding from the Federal Government if a City owns it Fiber and will provide it to the underserved community. There are also several Federal Government Appropriates available for providing WiFi to a "downtown" or central common area for tourism and can also be worked into the Economic Development package. The last option to be explored is the 5G option, determining when to begin this expansion is a bit tough, so I believe some extensive work sessions and also some educational opportunities exist.

60 Days

I've included a lot of items within the first 30 days of employment, for several reasons. The City Manager must provide the City Council a balanced Budget for consideration. So, with that being said, the Current Year Budget and the New Year 2019-2020 Proposed Budget must both be a priority. Along with the budget knowing the Financial status of the City is important in order to fund programs, such as fiber, stormwater projects, facility renovations or extensive maintenance. Even if a project is in the budget, once the CAFR has been completed you may find you need to reassess priorities or even better you can now afford to move forward with a build or a project. Reviewing the Strategic Action Plan is a must, along

with meeting with the Community and Community Organizations. I could continue with listing the priorities, but I believe all of the items must be assessed as described during the first 30 days, it is crucial, once the initial review and analysis has occurred, the second 60 days will include the follow-up and the assignment period.

Contracts need to be reviewed, to include any CCNA contracts, review contract's due to expire prior to the end of the fiscal year first, etc. Validate the need and present to the City Council or extend if allowed. Review all contracts in the next several months, part of the review includes a validation process verifying all contracts were properly bid or included as part of a legal piggyback process. Work with Legal and Purchasing to valid the process and update the Purchasing Manual and Policy, to work along with the Budge Adoption in September.

Part of the overall Contractual review period includes reviewing all the Master Plan's. If the current year budget includes a plan or Master plan – where are we, when will it be complete for review by the council – did we fund expected CIP's as part of the implementation phase- did we meet the performance measures assigned to the project? Do we have a Master Plan for the Utilities, Stormwater, Infrastructure, Economic Development, Information Technology, or for Parks & Recreation. Is the Comprehensive Plan or EAR due to be updated, if so then they need to be considered and funded through the budget process, the COMP Plan and the Parks & Recreation Master Plan usually work hand-in-hand.

Look at the funding sources as part of the Budget process – Impact Fees, Fire Assessment Fees, and other Special Revenues. When was the last time an Impact fee Rate Study was performed? With growth the need to know the Impact Fees reflect the current value to serve is critical, otherwise the fees collected will not pay for the service in which you expect to provide. Are the Impact Fees being spent in accordance with the Florida Statute, if needed meet with Finance and the City Attorney. Involvement with the Community Development Director, Utility and Public Works Director, as well as the City Engineer and Finance will be imperative while undergoing a review of the fee structure and special revenues.

Water and Sewer Rate Study – has one been performed recently? Are the rate payers paying the correct amount for base charges and for consumption of the service? Future CIP and normal operating functions need to be considered, as well as the Capital Outlay (fixed assets – equipment) that may be needed to fund future operations of the systems. Water and Treatment Plants require maintenance and sometimes modification a R&R program should be considered, especially if the CUP is in question, or needs to be expanded for the expected future growth.

90 Days

Now that I've worked with the Department Directors for some time, a retreat will be planned. As part of the team building a SWAT analysis will be performed by each department director. One on the department and one by each of the directors (identifying their strengths and weaknesses); teamwork will be a focus, learning how to lean and to work as a new team.

During each quarter I would like to take a Tour of the City and City Facilities with each Legislative member individually, in some cases these tours are focused on a particular facility or project.

Communication is aided by being at the facility or where the project is being worked, I believe the message can be conveyed in person better than in writing for certain projects.

The Budget process is still in the building phase, identifying all projects and programs is essential. Review of the departmental budgets and the City Council priorities will continue to be a focus. Develop the Performance Measures for each of the programs (measuring success as we go) and look to join Florida

Benchmark Consortium or ICMA according to the City Councils policy requirements and the fit of the City within these organizations.

Ensuring the departments have planned for Training of each employee in the upcoming year and Succession planning is vital. Each department director will be asked to prepare a succession planning template, looking at critical positions and evaluating needs. Validating the salary table structure and future pay adjustments, continue to compare pay schedules to local City's, keeping the City competitive for both pay and benefits.

120-to the end of the first year

During each quarter I would like to take a Tour of the City and City Facilities with each Legislative member individually, in some cases these tours are focused on a particular facility or project. Communication is aided by being at the facility or where the project is being worked, I believe the message can be conveyed in person better than in writing for certain projects.

Each quarter I will update the City Council on the Strategic Action Plan, where we are, what we've accomplished, what is in work, items on hold and why, and proposed changes or deletions to the plan.

Continue to brief the City Council during each meeting, as part of the City Manager's report on the status of projects or programs, financials, contract's and general items relating to the policies as set forth by the City Council.

During the budget process, presenting the Purchasing Manual, Investment Policy, Fund Balance and Reserve Policies, and the other related polices for review and approval. Indicating the Budget was balanced and included adherence to each of the policies, this will be part of the future process of the Budget.

The normal workweek will include operational items, some of which I may need to brief you on and others will be completed by the department. I view the department directors as "experts" in their field and they will provide input and advise on specific items. Each department director will be held accountable for their actions and they must own the process, the same for myself.

MANAGEMENT PROFILE

EVERYTHING **DiSC**
MANAGEMENT

Robin Hayes

Saturday, February 23, 2019

This report is provided by:

Strategic Government Resources, Inc.
PO Box 1642
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www.GovernmentResource.com



WILEY

INTRODUCTION TO DiSC®

Welcome to Everything DiSC®

Robin, have you ever wondered why connecting with some people is easier for you than with others?

Maybe you've noticed that you have an easier time managing people who focus on creating lively environments and relationships.

Or, maybe you're more comfortable working with those who take an optimistic, fast-paced approach than those who work at a steadier pace.

Or, perhaps you relate best to people who are more enthusiastic than analytical.

Everything DiSC® is a simple tool that offers information to help you understand yourself and others better—and this can be of tremendous use as a manager. This report uses your individual assessment data to provide a wealth of information about your management priorities and preferences. In addition, you'll learn how to connect better with people whose priorities and preferences differ from yours.

Cornerstone Principles

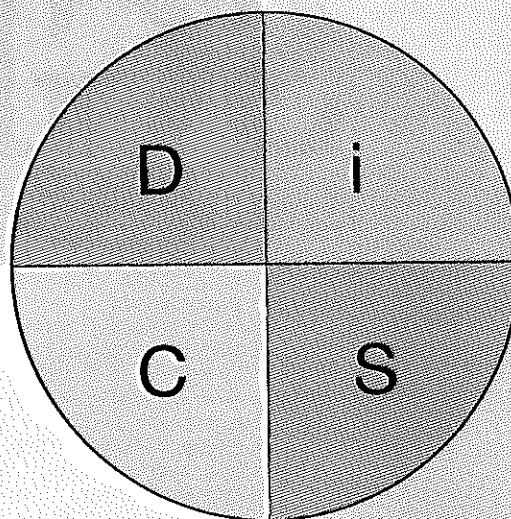
- ▶ All DiSC styles are **equally valuable**, and people with all styles can be effective managers.
- ▶ Your management style is also influenced by **other factors** such as life experiences, education, and maturity.
- ▶ **Understanding yourself** better is the first step to becoming more effective with your employees and your manager.
- ▶ Learning about other people's DiSC styles can help you **understand their priorities** and how they may differ from your own.
- ▶ You can improve the quality of your management experience by using DiSC to build more **effective relationships**.

DOMINANCE

- Direct
- Results-oriented
- Firm
- Strong-willed
- Forceful

INFLUENCE

- Outgoing
- Enthusiastic
- Optimistic
- High-spirited
- Lively



- Analytical
- Reserved
- Precise
- Private
- Systematic

- Even-tempered
- Accommodating
- Patient
- Humble
- Tactful

CONSCIENTIOUSNESS

STEADINESS

YOUR DiSC[®] OVERVIEW

How is this report personalized to you, Robin?

In order to get the most out of your *Everything DiSC Management[®] Profile*, you'll need to understand your personal map.

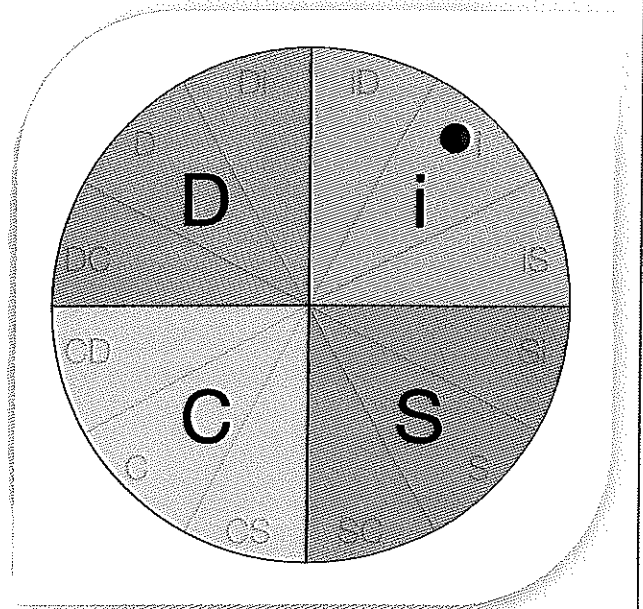
Your Dot

As you saw on the previous page, the Everything DiSC[®] model is made up of four basic styles: D, i, S, and C. Each style is divided into three regions. The picture to the right illustrates the 12 different regions where a person's dot might be located.

Your DiSC[®] Style: i

Your dot location indicates your DiSC style. Because your dot is located in the middle of the i region, you have an i style.

Keep in mind that everyone is a blend of all four styles, but most people tend strongly toward one or two styles. Whether your dot is in the center of one style or in a region that borders two, **no dot location is better than another**. All DiSC[®] styles are equal and valuable in their own ways.



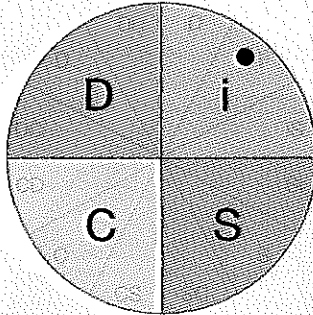
Close to the Edge or Close to the Center?

A dot's **distance from the edge** of the circle shows how naturally inclined a person is to encompass the characteristics of his or her DiSC style. A dot positioned toward the edge of the circle indicates a strong inclination toward the characteristics of the style. A dot located between the edge and the center of the circle indicates a moderate inclination. And a dot positioned close to the center of the circle indicates a slight inclination. A dot in the center of the circle is no better than one on the edge, and vice versa. Your dot location is near the edge of the circle, so you are **strongly inclined** and probably relate well to the characteristics associated with the i style.

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

Your Dot Tells a Story

Your DiSC Style Is: **i**



Like other managers with the **i** style, Robin, you probably enjoy relating to other people. You tend to have a fairly extensive network of friends and colleagues, and you may view a roomful of strangers as a fun opportunity to connect. Similarly, you're likely to get personal satisfaction out of introducing people who would not otherwise meet.

Because you're optimistic and enthusiastic, you may find it easy to get the people you manage excited about your goals and ideas. When you speak, you're likely to promote your opinions with passion. Many people probably find your enthusiasm contagious. However, those who are more skeptical may feel that you are overly optimistic at times.

When communicating, you tend to be expressive, and you may dial up your volume and gestures to get people's attention. Compared to most managers, you have a stronger urge to process your feelings by verbalizing them. At times, your somewhat talkative nature may cause you to monopolize conversations, particularly with those who are more soft-spoken.

In terms of time management, you like to have a variety of tasks on your plate and probably grow bored with routine. Most likely, you maintain your enthusiasm and drive under time pressure. Although you're often excited to start a new project, you may sometimes dive in without adequate planning or resources. Because you're probably confident in your ability to improvise, you may prefer a more free-flowing approach.

You probably enjoy making gut-instinct decisions, but you also tend to be accepting of other people's ideas. In fact, when people offer opinions or weigh in, you sometimes may be reluctant to give negative feedback for fear of being seen as the "bad guy." At times, your optimism may also cause you to overestimate your own abilities or misjudge the difficulty of a task.

You genuinely enjoy being around other people, so you probably encourage people to work collaboratively. Most likely, you see team brainstorming sessions as leading to endless possibilities, and you tend to actively solicit ideas from other people. However, because you naturally want to connect and collaborate with others, you may not always realize that some people require more personal space.

Like others with the **i** style, you may tie your self-worth closely to your social circle. You strive to make favorable impressions whenever possible, and you're most likely comfortable being the center of attention. In fact, you probably enjoy telling stories and entertaining others in a colorful, engaging way.

In conflict, you may be inclined to brush any unpleasantness under the rug for as long as possible. However, if your anger, frustration, or hurt reaches a breaking point, you may say things you later regret. For you, venting may feel like a therapeutic process, but it may make the people you manage highly uncomfortable.

Robin, like others with the **i** style, your most valuable contributions as a manager may include your ability to generate excitement, your high energy, and your desire to bring people together. In fact, these are probably some of the qualities that others admire most about you.

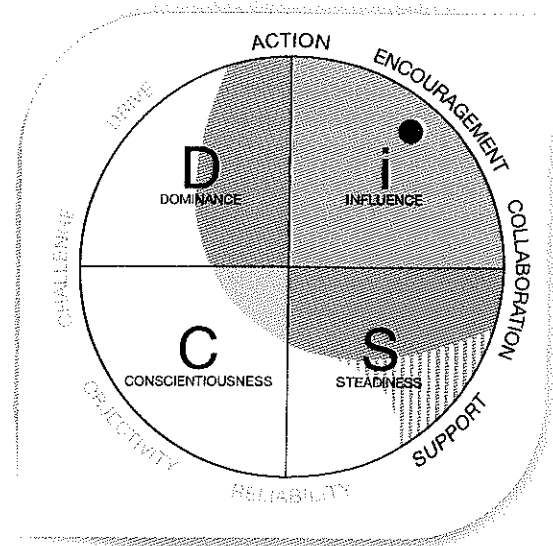
YOUR DiSC[®] PRIORITIES & SHADING

Your Shading Expands the Story

Robin, while your dot location and your DiSC[®] style can say a great deal about you, your map **shading** is also important.

The eight words around the Everything DiSC map are what we call **priorities**, or the primary areas where people focus their energy. The closer your shading comes to a priority, the more likely you are to focus your energy on that area. Everyone has at least three priorities, and sometimes people have four or five. **Having five priorities is no better than having three, and vice versa.**

Typically, people with the i style have shading that touches **Encouragement**, **Action**, and **Collaboration**. Your shading stretches to include **Support**, which isn't characteristic of your style.



What Priorities Shape *Your* Management Experience?

► Providing Encouragement

Robin, like other managers with the i style, you tend to value people's emotional needs and want members of your team to feel good about their contributions. Therefore, you probably take time to give people recognition and celebrate group victories. You focus on providing encouragement so people feel energized and optimistic about their work.

► Valuing Collaboration

You tend to recognize the importance of group effort, making it a key component of how you work. Most likely, you include others in important activities and decisions, and you may pride yourself on your ability to build team spirit by getting everyone involved. You value collaboration because you think it not only leads to better outcomes, but it makes the job more fun.

► Taking Action

Managers with the i style usually like excitement and fast movement. Most likely, you're energized by innovative, groundbreaking solutions, and you're eager to hit the ground running. In fact, your pace might be a bit fast for some of the people you manage, but rather than slow down, you may encourage them to catch up with you. Because you emphasize action, you may inspire your team to push forward quickly.

► Giving Support

Moreover, you place a high priority on supporting others, although this is not typical of the i style. You may prefer to have harmony in your relationships, and people probably know you're ready to help or listen patiently when needed. Because an orderly, peaceful environment is important to you, you're willing to put your own needs aside to give support to others.

YOUR MANAGEMENT PREFERENCES

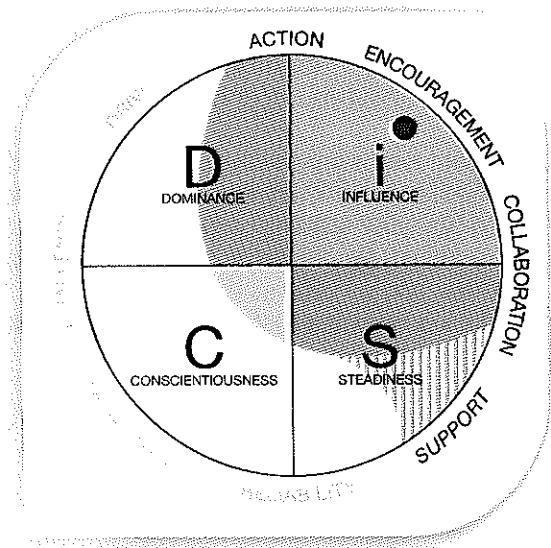
What Do You Enjoy About Managing?

Different people find different aspects of their work motivating. Like other people with the *i* style, you may enjoy working with others toward a common goal, and you may strive to create a high-energy environment where people can express themselves. In addition, you likely appreciate that management allows you to help others succeed in their professional development. Furthermore, you may appreciate the ability to foster a supportive environment where people listen to one another's needs, and this is less typical of the *i* style.

You probably enjoy many of the following aspects of your work:

MOTIVATORS

- Developing warm relationships with team members
- Keeping things moving
- Inspiring others to do their best
- Promoting creativity
- Building an optimistic mindset in others
- Getting people involved
- Increasing enthusiasm
- Supporting people when they express their concerns and frustrations
- Considering the needs and opinions of others



What do your priorities say about what motivates you and what you find stressful?

What Drains Your Energy as a Manager?

Then there are those management responsibilities that are stressful for you. Because you want to maintain friendly relationships and be well-liked, you may have problems pushing people to get results, especially if doing so requires you to confront them. Furthermore, you may dislike an atmosphere that feels dull or hinders your energetic pace. At the same time, unlike others with the *i* style, you may find it difficult to manage people who are too aggressive or combative.

Many of the following aspects of your work may be stressful for you:

STRESSORS

- Giving people unpleasant feedback
- Being forceful or insistent with others
- Making tough decisions independently
- Working steadily toward long-term goals
- Managing challenging or skeptical people
- Being unable to use your intuition
- Having to slow your pace
- Having to reprimand people
- Dealing with angry or argumentative people

YOUR DIRECTING & DELEGATING STYLE

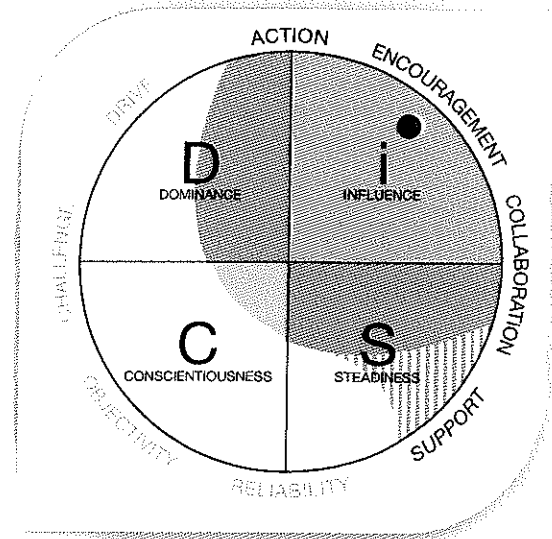
As a manager, you may find that effectively directing and delegating to your employees is more complex than simply handing off an assignment with a "please" and "thank you." Perhaps you've noticed that individual employees respond positively to different types of instruction and feedback. Some want specific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

Robin, because you place a **strong emphasis on encouragement**, you tend to be optimistic about people and their abilities. Therefore, you usually give individuals the benefit of the doubt and may assign tasks to team members without making sure they have the skills to get the job done.

You also prefer to **collaborate**, and the people you manage may be empowered by your trust in their abilities. However, when situations require a more direct approach, you may have trouble being tough and holding people accountable.

Because you **focus on action**, you tend to be fast-paced when directing a team. You probably try to get others excited about their tasks, but you may occasionally be vague about the specifics in your eagerness to get people moving.

Furthermore, you tend to be **supportive**, which isn't typical for someone with the i style. As such, you usually make sure people know you're there to help when needed.



How Do You Approach Directing & Delegating?

STRENGTHS

- Giving direction in a friendly and positive manner
- Making people feel that they are important contributors
- Encouraging creativity in the execution of tasks
- Generating enthusiasm
- Getting people moving
- Making yourself available to help

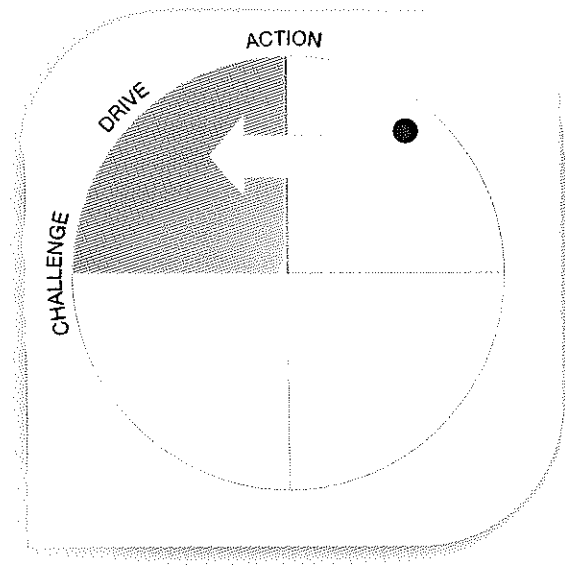
CHALLENGES

- Pushing people to complete their tasks
- Judging people's abilities or competencies, without overestimating them
- Highlighting the importance of routine tasks
- Creating a reliable setting
- Giving clear, detailed explanations
- Analyzing options before assigning a task

DIRECTING & DELEGATING TO THE D STYLE

How Does the D Style Like to Work?

People with the D style prioritize the bottom line and are driven to get results. Furthermore, they are willing to take risks in pursuit of success, probably even more so than you. They strive for ambitious goals and want the freedom to make their own decisions without having to ask for input from other people. And because they value their independence, they may not share your preference to collaborate and work closely as a team. Their autonomy also makes them less likely to require the encouragement you frequently offer.



Potential Problems When Working Together

People with the D style are often questioning and skeptical, and they may challenge your authority if they disagree with your decisions. They don't share your focus on other people's feelings and may be blunt or assertive when expressing their opinions. And because you tend to assume the best in people, you may mistake their self-assured attitude as competence, even if they don't have the necessary skills or experience. In these cases, you may be surprised when they fail to deliver what you expected.

How to Be Effective with the D Style

Like you, people with the D style are fast-paced and want to work on exciting projects that will make a big impact. Therefore, encourage them to tackle more adventurous tasks. Give them freedom to decide on methods and tactics, but make sure they don't try to make decisions that exceed their qualifications. If they have exhibited sound judgment in the past, show respect for their bold ideas and decision-making ability. Given your i style, you may need to focus more closely on their skill level and make sure to check in more frequently if they lack experience.

If they're less experienced:

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

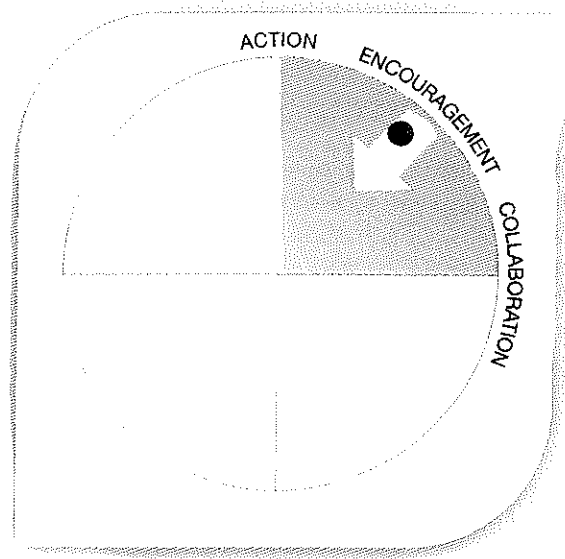
If they're more experienced:

- Show them the most practical way to be productive.
- Be direct about the results you expect.
- Set a deadline and let them figure out how to proceed.
- Make sure they understand the consequences of their shortcuts.
- Specify the limits of their authority while still allowing for some autonomy.

DIRECTING & DELEGATING TO THE I STYLE

How Does the i Style Like to Work?

People who share your i style are generally upbeat and optimistic. You're both usually sociable and openly expressive, and they probably appreciate your tendency to provide them with encouragement. They typically share your enthusiasm for exciting tasks and your eagerness to interact with others. Furthermore, they're outgoing when it comes to expressing their thoughts and feelings. Just as you tend to be at ease when ideas and conversation flow freely, they may be most relaxed when they can be upfront about their needs.



Potential Problems When Working Together

People who share your i style like to work in a fun environment, and you both probably appreciate the social aspects of the job. Like you, they enjoy spending time with other people, channeling their high energy into collaborative efforts. However, at times, your "i" employees may allow social needs to take precedence over the bottom line, and you may neglect to push them for practical results. And because you may find it easy to develop friendly relationships with them, it may be difficult for you to give them negative feedback.

How to Be Effective with the i Style

Like you, these individuals tend to move quickly. Because they seek new or exciting projects, they may become restless if they are forced to work for long periods of time on routine tasks. They share your tendency to improvise and make spontaneous decisions. As a result, you may need to check in frequently with those who lack experience to make sure they are on track and meeting deadlines. For those who are more experienced, encourage creativity and experimentation, but make sure vital details or tasks don't slip through the cracks.

If they're less experienced:

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

If they're more experienced:

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

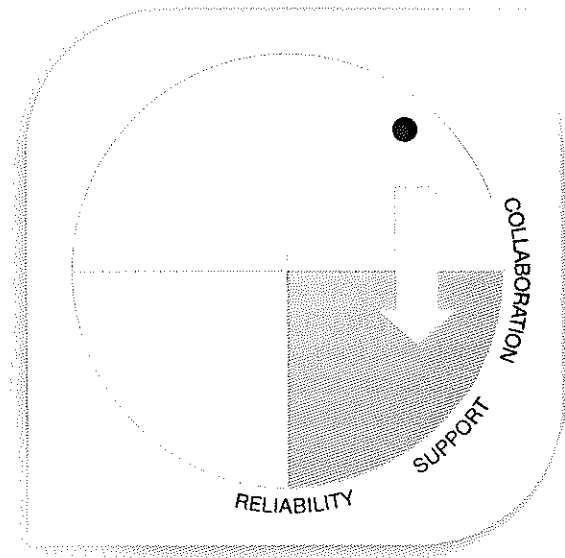
DIRECTING & DELEGATING TO THE S STYLE

How Does the S Style Like to Work?

People with the S style tend to be accommodating and flexible, and you share their supportive nature even though it's less typical for someone with the i style. Therefore, they'll respond positively to your friendly manner and genuine interest in their needs. However, because they want to be sure they know exactly what is required, they want to be given clear guidance, yet may be too soft-spoken to ask for it. Consequently, you may need to make an extra effort to supply the step-by-step instruction that they like.

Potential Problems When Working Together

These individuals tend to make steady progress toward predictable goals, while you're more likely to rely on the power of enthusiasm and big ideas. Therefore, they may become uncomfortable if you delegate high-pressure tasks to them or urge them to take risks. They dislike dealing with abrupt changes, so your tendency to improvise and make quick adjustments may leave them disoriented. As a result, they may look for more stability from you, while you may become frustrated with their hesitancy to take chances.



How to Be Effective with the S Style

Like you, people with the S style may be most comfortable in friendly, cooperative environments. While they share your preference to collaborate with others, they will seldom push for more authority within the group because they are much more comfortable working behind the scenes. Give them step-by-step instructions and make sure they're comfortable with a task before setting them loose. If they have more experience, give them as much responsibility as you can, but make it clear that you're available to advise them when needed.

If they're less experienced:

- Give clear, step-by-step directions.
- Ask questions to confirm their understanding.
- Check in with them frequently.
- Refrain from giving them too much responsibility too quickly.
- Avoid pushing them to move ahead before they are ready.

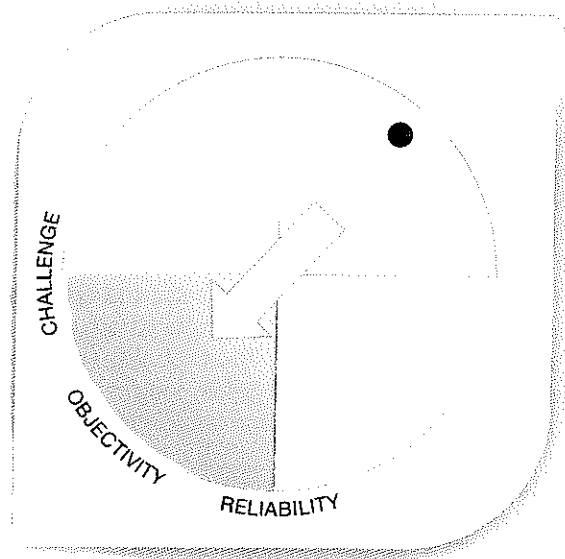
If they're more experienced:

- Ask enough questions to elicit their concerns.
- Give them additional responsibilities when they seem ready for more challenges.
- Encourage them to take initiative.
- Make yourself available as an advisor.
- Ask them directly what kind of support they need.

DIRECTING & DELEGATING TO THE C STYLE

How Does the C Style Like to Work?

People with the C style relate best to clear objectives and fact-based ideas. They take time to analyze concepts and closely examine solutions. Because they rely on logic and objectivity, your tendency to make decisions based on gut instinct may frustrate them. Furthermore, they're comfortable working alone, and they may even avoid the collaboration that you prefer. In fact, they require only very minimal face time and appreciate environments that foster independence.



Potential Problems When Working Together

These individuals want to produce dependable outcomes, so they tend to thoroughly consider all the consequences before choosing a plan. They prefer to go over options and proposals carefully, which is in contrast to your tendency to move quickly. Therefore, they may become annoyed if you pressure them to multi-task or rush their efforts, and they may see your push for exciting options as careless or sloppy. In turn, you may think their tendency to go over solutions repeatedly stands in the way of progress.

How to Be Effective with the C Style

People with the C style want to work in an environment where they feel free to point out flaws and question inefficiencies. You may believe that their objections stifle creativity, but remember that they are more concerned with high quality and getting things right. Those with less experience may spend too much time analyzing and perfecting their work, so be sure to check in often enough to keep them on track. For those with more experience, allow more autonomy but set clear deadlines that keep them moving forward.

If they're less experienced:

- Avoid forcing them to collaborate unless it's necessary.
- Help them achieve quality without putting deadlines at risk.
- Communicate with clarity rather than enthusiasm.
- Make sure they have the resources they need.
- Check in to make sure they aren't getting bogged down.

If they're more experienced:

- Check in when necessary to ensure forward progress.
- Encourage them to ask for more direction if they need it.
- Listen to their concerns about quality.
- Allow them to work independently when possible.
- Give them opportunities to help solve complex issues.

MOTIVATION AND THE ENVIRONMENT YOU CREATE

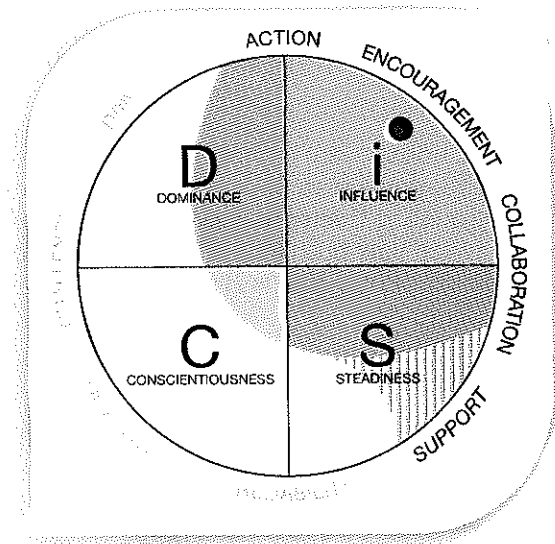
You can't motivate people. They have to motivate themselves. As a manager, however, you can create an environment where it's easy for people to find their own natural motivation. This means building an atmosphere that addresses employees' basic needs and preferences so they can do their best work, and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

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

Most likely, your **tendency to take action** might help establish a high-energy setting where people want to get going and keep moving. The people you manage may be inspired by your fast pace, and your emphasis on forward momentum can help instill confidence that they are going to help make things happen quickly.

Similarly, your **strong preference for collaboration** may strengthen the bond among team members, which is often essential for reaching goals. People who feel that group efforts are appreciated are more likely to seek opportunities to brainstorm together and make improvements, without concern for who should receive the most credit.

Furthermore, unlike others with the *i* style, you have an extra priority that may influence motivation and the environment you create. Since you tend to **offer support**, the people you manage probably feel that someone cares about them, which can be extremely motivating for some.



The Environment You Create

- Because you deliver positive feedback, people feel good about their contributions.
- Your optimism and enthusiasm can make work more fun.
- Your passion and high energy may inspire people to move quickly.
- Because you build teams, people feel a sense of camaraderie.
- When you put confidence in others, they may feel empowered to use creative approaches.
- Because you are understanding and patient, workers are less frustrated when attempting new things.

MOTIVATION AND THE D STYLE

What Are the Motivational Needs of the D Style?

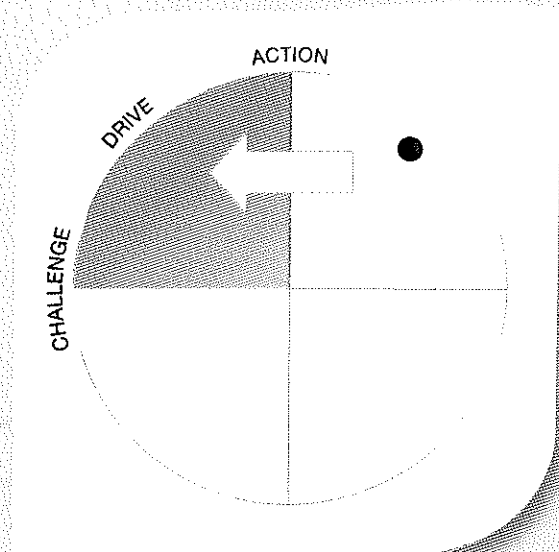
Employees with the D style are motivated to win, so they probably care more about the bottom line than how they get there. They're driven to achieve, probably more so than you, so they often thrive in competitive environments and can sometimes turn the most collaborative task into a contest. Furthermore, they share your desire to move quickly and want to make a big impact with innovative or daring ideas. In fact, they may be so focused on individual career growth that they disregard the needs of others, and you may have trouble understanding their challenging approach.

What **demotivates** the D style?

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

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

- Employees with this style may embrace conflict as a way to create win-lose situations.
- They may be energized by the competitive aspects of conflict.
- They may waste energy dwelling on who is at fault.



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

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

What's the best way for you to **recognize and reward** the D style?

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

MOTIVATION AND THE i STYLE

What Are the Motivational Needs of the i Style?

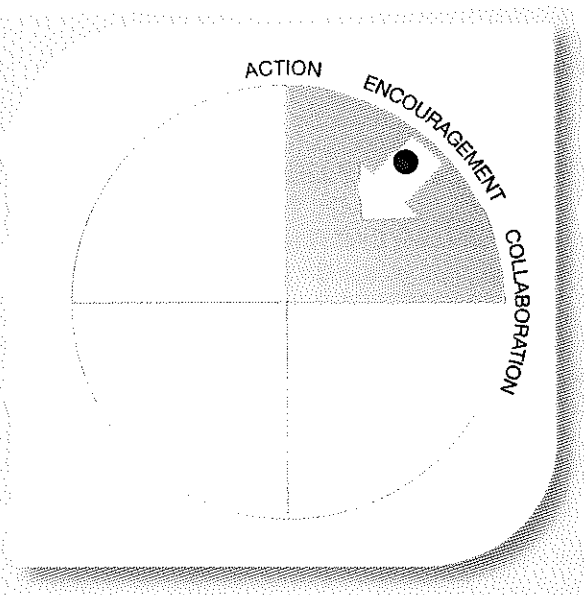
Employees with the i style look for high-energy environments where adventurous or groundbreaking ideas are valued. They're eager to collaborate, as you probably are, so they're likely to put a lot of energy into socializing and maintaining relationships. Because they like fun, vibrant settings, they often move quickly and indulge in a variety of tasks, and you probably don't have much trouble keeping up with their fast pace. Those with the i style are also motivated by public recognition, and like you, they appreciate a warm and encouraging environment.

What **demotivates** the i style?

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

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

- Conflict may make them emotional or angry, and as a result may negatively affect their performance.
- They may take conflict personally, which could de-energize them.
- They may dwell on the conflict rather than focus on their tasks.



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

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

What's the best way for you to **recognize and reward** the i style?

- Praise them publicly, making sure the whole team knows when they've accomplished something great.
- Let them know that others appreciate the energy and enthusiasm they consistently bring to the table.
- Reward them by giving them opportunities to shine.
- Recognize their contributions by recommending them for awards or advancement opportunities.

MOTIVATION AND THE S STYLE

What Are the Motivational Needs of the S Style?

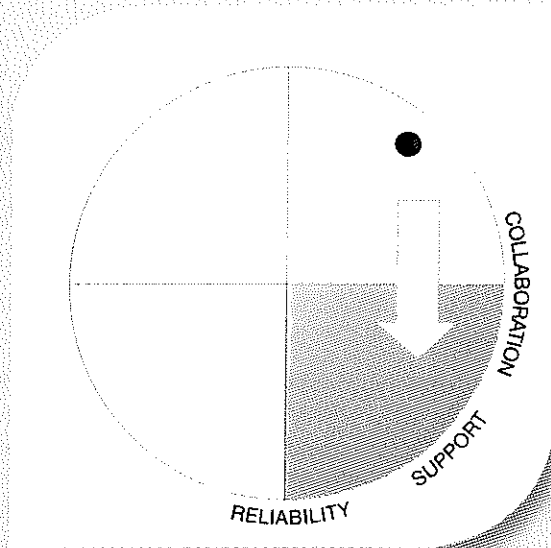
People with the S style prefer a calm, structured atmosphere where tension and conflict are rare. Like you, they tend to be supportive, and may even withhold their own opinions to accommodate or please other people. In addition, they like to connect with colleagues on a personal level by working in a collaborative setting, and you may appreciate their affinity for teamwork. Furthermore, they want to be seen as reliable and to have enough time to perform their duties without being rushed or stressed, which probably isn't as important to you.

What **demotivates** the S style?

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

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

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



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

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

What's the best way for you to **recognize and reward** the S style?

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

MOTIVATION AND THE C STYLE

What Are the Motivational Needs of the C Style?

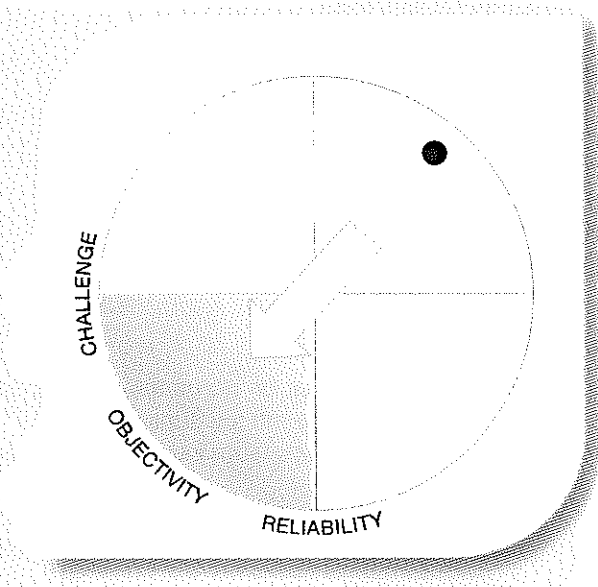
Employees with the C style look for an environment where they will have time to analyze ideas and ensure flawless outcomes. They want to produce work that's reliable, so they prefer to maintain a moderate pace and exercise a sense of caution, which isn't one of your top priorities. Because they tend to be even more objective than you are, they like to weigh all the options and gather all the facts before making decisions. Also, they want to master their responsibilities, so they often challenge ideas to ensure accuracy, an approach you probably don't share.

What **demotivates** the C style?

- Being required to work collaboratively
- Receiving vague or ambiguous directions
- Having to deal with strong displays of emotion
- Being forced to let errors slide
- Having to make quick decisions
- Being wrong

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

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



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

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

What's the best way for you to **recognize and reward** the C style?

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

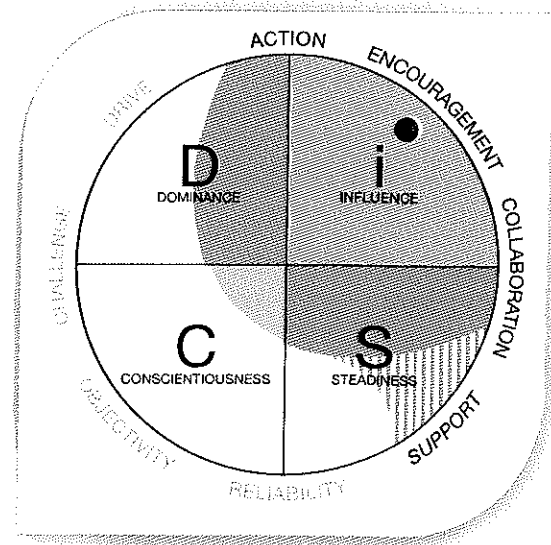
YOUR APPROACH TO DEVELOPING OTHERS

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

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

Robin, you usually want the best for the people you manage, and this interest in their well-being often helps you address their development needs. Most likely, you're optimistic about people's abilities and encourage them to reach for their loftiest goals. When it comes to career growth, you may motivate people to take quick action and be creative as they find ways to use their strengths. And because you usually let people know that you're eager to help them develop, they probably feel comfortable approaching you with their questions and concerns. Overall, you find ways to give people confidence as they identify their talents and provide opportunities for them to showcase these talents.

Furthermore, unlike others with the i style, you also have an extra priority that might influence your approach to developing others. To you, developing others encompasses giving support and being there to assist people when they need it.



Your Development Approach

ADVANTAGES

- Encouraging creative or daring ideas for people's development
- Making yourself available for mentoring
- Boosting others' self-confidence with your belief in their abilities
- Pushing people to move quickly in their development
- Inspiring people to think big
- Taking the time to listen to people's real concerns

DISADVANTAGES

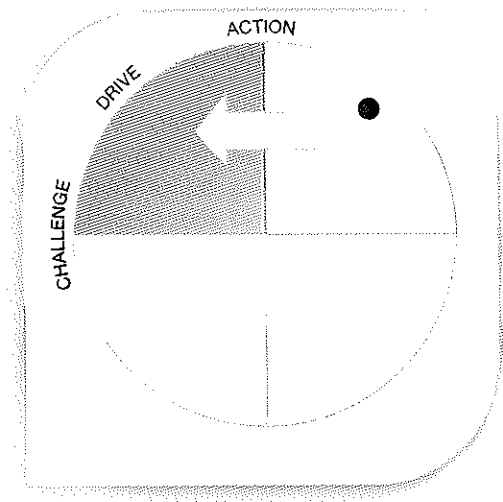
- Pushing people at a pace that doesn't allow them time to develop necessary skills
- Being unrealistically optimistic about some people's development options
- Failing to take a long-range view of people's development needs
- Putting too much emphasis on positive behaviors at the expense of addressing problems
- Failing to consider whether development plans are well-suited to the person
- Being too accepting when people don't quite meet objectives

DEVELOPING YOUR “D” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Drive

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

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

Action

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

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

Challenge

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

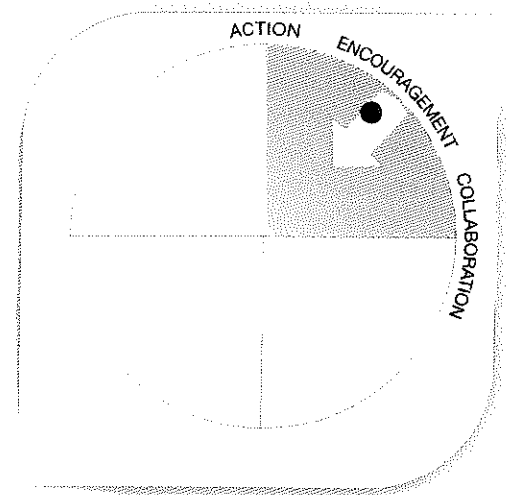
- Allow them to work independently to the degree that they don't damage team unity.
- Reassert your authority if necessary.
- Set up a system so they know when you are suggesting and when you are telling.

DEVELOPING YOUR “I” EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Encouragement

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

- Continue to be optimistic when assessing their development, but don't ignore problems.
- You may need to offer tougher feedback at times.
- Check to make sure they understand your feedback.

Action

Like you, these individuals are interested in fast-paced innovation, and they may avoid development opportunities that require in-depth analysis. Because you are equally likely to push for action, the two of you may come up with development plans that are vague or overly optimistic. Instead, it may be helpful to look at promising opportunities that might require more attention to detail.

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

Collaboration

Like you, these individuals love working with other people, and this can be a great source of strength in their development. However, because you both value collaboration above individual accomplishment, the two of you may focus exclusively on collective efforts at the expense of personal goals. Remember that sometimes independent efforts are as important as teamwork when it comes to personal growth.

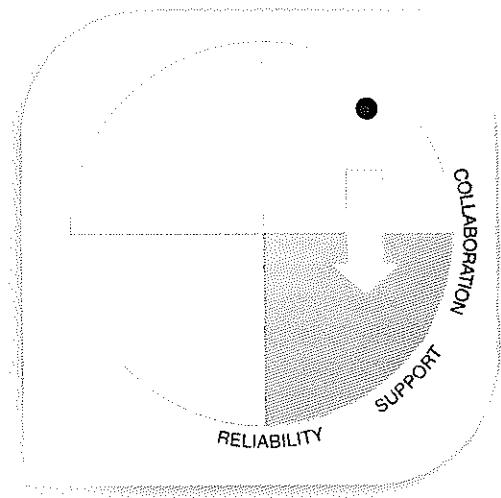
- Encourage them to pursue opportunities that involve working with others.
- Allow them to lead small groups.
- Remind them that their growth will also depend on independent work.

DEVELOPING YOUR "S" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Support

While it's not typical for the i style, you tend to be supportive and offer the reassurance that people with the S style need. As a result, they probably appreciate the level of patience and consideration you extend to their development. Still, because you focus on people's emotional needs, you may not push them to reach beyond their comfort zones.

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

Reliability

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

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

Collaboration

Like you, people with the S style are comfortable working with others, but their focus on collaboration may be at the expense of individual opportunities for growth. And since you both want harmonious relationships, you may have trouble providing tough feedback. Trying to avoid hurting their feelings may deprive them of constructive criticism that could help them down the line.

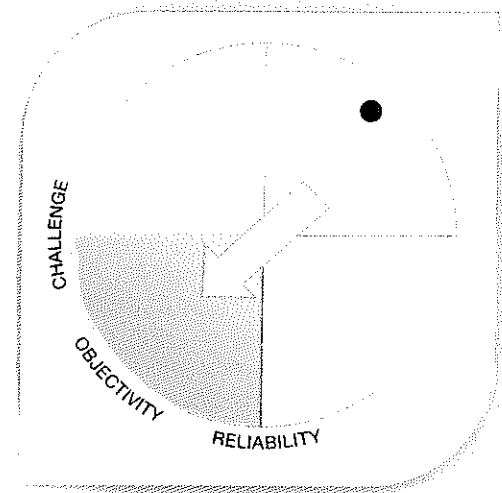
- Encourage them to pursue collaborative opportunities while furthering their own development.
- Show them that they have the strength to work autonomously.
- Offer constructive feedback when necessary.

DEVELOPING YOUR "C" EMPLOYEES

Areas Where They Have Strong Potential

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

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



Obstacles and Strategies in the Development Process

Objectivity

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

- Steer them toward analytical development opportunities.
- Respect their independence, but remind them to fill you in on their progress.
- Avoid forcing them to socialize, but reinforce the importance of teamwork.

Reliability

People with the C style want development opportunities that are clear and well planned, so they may reject your tendency to keep moving forward, leaving the specifics for later. Further, they may be less interested in your daring or innovative ideas for development, even though playing it safe isn't likely to lead to growth.

- Put development opportunities into a clear, well-organized framework.
- Encourage them to look beyond safe and predictable development plans.
- Ensure that they see the drawbacks of playing it safe.

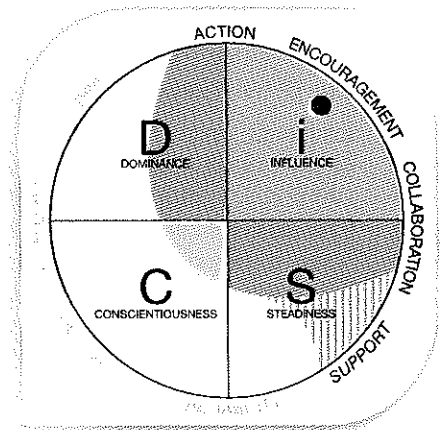
Challenge

These individuals are often skeptical, so they may probe ideas for flaws even after others have accepted them. They frequently question solutions, which may be frustrating as you work with them to create a development path. And their tendency to say "no" may come across as dismissive or resistant.

- Expect that you'll have to back up your ideas with evidence if you want buy-in.
- Hold them accountable if they question your ideas in a disrespectful way.
- Give them time to think over your suggestions before making final decisions together.

HOW YOUR MANAGER SEES YOU

One of the most important but often overlooked aspects of management is sometimes called “managing up.” This refers to effectively working with and influencing your own manager. Understanding how your manager sees you is important, but sometimes difficult. This page provides insight into how your manager might see you.



► Encouraging

Robin, since you have an i style, you probably come across as enthusiastic and people-oriented. Your manager may appreciate your tendency to inspire people to keep a positive outlook. On the other hand, because you're sometimes overly optimistic, some managers may be concerned that you let your emotions cloud your judgment, while others may not identify with your emphasis on a lively work environment.

- Some managers may see you as unrealistically optimistic.
- Your manager may prioritize facts over passion.

► Active

Many managers will appreciate that you get going quickly on tasks and projects. Furthermore, they may like how your energetic push toward new opportunities gives the organization momentum. On the other hand, some managers may see your speed as sloppy or reckless, while others may worry that your excitement could cause you to overlook other important factors.

- Your manager may see shortcuts as evidence of sloppy work.
- Some managers may find your more adventurous ideas to be impractical or unrealistic.

► Collaborative

Because of your emphasis on teamwork, your manager probably feels comfortable that you'll gather a lot of input to create stronger solutions. Many managers may also appreciate your openness to ideas even if they didn't originate with you. However, your consistently collaborative approach may lead some managers to think that you're more interested in the group process than in getting things done.

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

► Supportive

In addition, you tend to be supportive, which isn't typical of the i style, and many managers may see your willingness to help as a great asset in making their jobs less stressful. However, some managers may think you have trouble holding people accountable for subpar performances.

- Your manager may see you as too lenient at times with people who are underperforming.
- Some managers may see you as too willing to compromise on goals rather than pressure others.

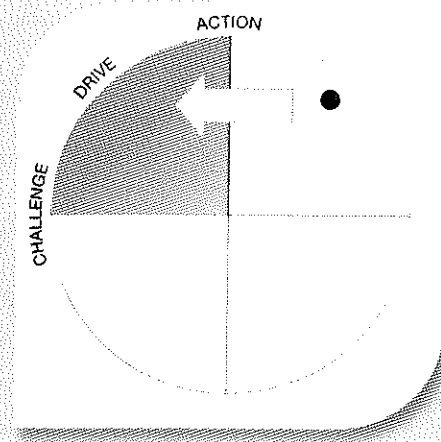
WORKING WITH "D" MANAGERS

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

Their Priorities & Preferences

Managers with the D style put a strong emphasis on drive and are active in pursuing bottom-line results. They can be demanding and blunt and won't hesitate to voice their skepticism. Overall, they respond best to people who can quickly help them achieve success.

- Unlike you, their drive for results may cause them to overlook people's feelings or make compromises to quality.
- Like you, they prioritize action and want to keep progressing at a rapid pace.
- Unlike you, they tend to openly challenge the status quo and pressure others to meet their high standards.



Advocating & Getting Buy-In

Managers with the D style want to see concrete results as fast as possible, so you may get buy-in by showing how your plan will quickly affect the bottom line. And because they respect confidence, your natural self-assurance might help your proposals get serious consideration. However, if you present your ideas enthusiastically without illustrating the substance, these managers may dismiss them as frivolous. Like you, they want to keep things moving quickly and may become frustrated when something or someone slows progress. Avoid unnecessary details, but be ready with facts in case they challenge your assumptions. Furthermore, they want to feel in control, so show respect for their leadership by offering them an ownership stake in the solution.

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

Dealing with Conflict

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

- Avoid viewing their directness as a personal attack.
- Don't gloss over disagreements just to keep things friendly.
- Keep the discussion focused on the issue at hand.

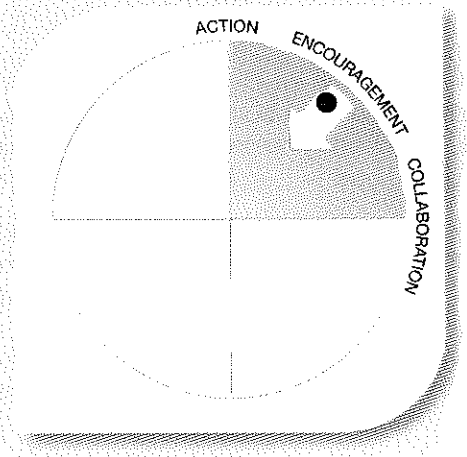
WORKING WITH “I” MANAGERS

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

Their Priorities & Preferences

Managers with the i style tend to be energetic and encourage others to do their best. Overall, they want to lead a fast-paced but friendly team, and they will likely respond best to people who like to create an optimistic team spirit.

- Like you, they give people recognition and celebrate group victories.
- Like you, they prefer to work with others and prioritize teamwork.
- Like you, they focus on action and move quickly while striving for forward progress.



Advocating & Getting Buy-In

Managers who share your i style look for cooperation and want to know how your plans will affect other people. Like you, they're interested in finding ways to interact, and they believe collaboration leads to better outcomes. To gain their buy-in, show them how team members can work together to reach your goals. Use your energetic approach to show them that your solution has the power to invigorate people, but avoid exaggerated claims that might mask legitimate flaws. Furthermore, they share your desire for fast movement and groundbreaking solutions, so lay out the big picture, and assure them that things will happen quickly once you have their buy-in.

- Emphasize how your ideas can quickly energize people.
- Discuss the effect of your ideas on other people.
- Refrain from overestimating an idea's true potential.

Dealing with Conflict

Managers who share your i style want to maintain friendly relationships. However, self-expression is very important to them, so they may demand to be heard in a conflict situation. Because you have a similar approach, you and an “i” manager may say harsh things to one another that are difficult to take back. Furthermore, you both may have trouble letting things go later. Therefore, when things get tense, express your concern for their feelings and a desire to work through the conflict quickly but thoroughly, and avoid personal attacks. Let them know that a disagreement now doesn't mean a poor relationship down the road.

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

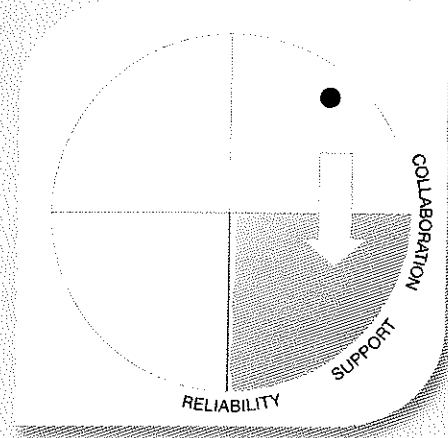
WORKING WITH “S” MANAGERS

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

Their Priorities & Preferences

Managers with the S style tend to be accommodating and dependable. Overall, they want to lead a team in a calm setting where tension is rare, and they will likely respond best to people who are friendly team players.

- Like you, they emphasize supporting others and have empathy for people's needs.
- Like you, they prioritize collaboration and want people to work together harmoniously.
- Unlike you, they often dodge change in order to maintain a dependable setting.



Advocating & Getting Buy-In

Managers with the S style want to see how your ideas can contribute to steady progress and reliable results. They are less spontaneous than you tend to be and would need time to prepare for any major changes that you might suggest. While they'll probably let you lead the discussion, remember that excessive enthusiasm is unlikely to help you gain their buy-in. Because they often weigh both sides of a decision, they may want more time to consider your proposal. Furthermore, like you, they're interested in collaboration and team unity. Capitalize on this mutual interest by specifying how your solution can create opportunities to bring the group together. And remember that if the plan feels disorganized, you may not earn their needed support. Present your ideas as clearly as you can, and be ready with details to address their concerns.

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

Dealing with Conflict

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

- Address the situation directly rather than masking your differences.
- Don't assume that their silence means they agree with you.
- Follow up to make sure the issue is resolved.

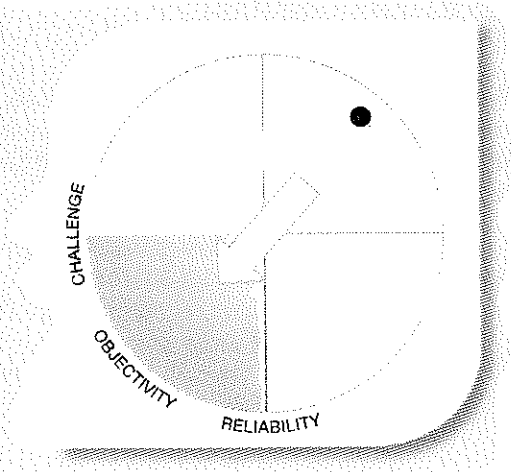
WORKING WITH "C" MANAGERS

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

Their Priorities & Preferences

Managers with the C style put a strong emphasis on logic and maintaining a stable environment. Overall, they want to lead by setting high standards, and they will likely respond best to people who share their concern for high-quality outcomes.

- Unlike you, they spend a lot of time on objective analysis to ensure accuracy.
- Unlike you, they tend to move cautiously in order to deliver a reliable outcome.
- Unlike you, they tend to show open skepticism for ideas that aren't backed up by facts.



Advocating & Getting Buy-In

Managers with the C style want to see how your ideas can lead to a high-quality solution. Because they want to anticipate potential issues or complications, they're likely to ask a lot of questions. For this reason, your big-picture focus may fail to get their buy-in. If you want them to act, prove your competence by utilizing facts and logic. Furthermore, they're more interested in reliability than speed, so you may need to slow down and show them that you've thought through all of the consequences of your plan. They're unlikely to respond well to overly enthusiastic presentations. In fact, if you come across as too passionate, they're more likely to view your efforts as chaotic and unsafe. By giving them the information they want and the time to process it, you will be much more likely to get them on your side.

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

Dealing with Conflict

Because managers with the C style view conflict as a disagreement over who is correct, they may avoid direct aggression and remain objective instead. If emotions begin to run high, however, they may withdraw or refuse to discuss the matter further. You tend to gloss over differences, but if forced to confront the situation, you may become emotional. In such cases, they may not understand your need to express yourself. Therefore, you may need to focus more on facts to make sure you hear their side of the story. Don't insist on immediate resolution since they may need time to process. State your position factually and give them time to present their side.

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

APPENDIX: OVERVIEW OF THE DISC® STYLES

The graphic below provides a snapshot of the four basic DISC® styles.

