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October 29, 2021

Chair Wendy Jacobs and DCHC MPO Board
101 City Hall Plaza
Durham, NC 27701

Dear Chair Jacobs and DCHC Board Members:

Thank you for requesting our proposal for the upcoming Executive Director's process.

We have worked with most of you on previous projects, as follows:

- Triangle J Director search process and 360 project
- Durham City and County Managers' search processes
- Chapel Hill Town Manager search process

We have also worked with several clients, including Durham and Chapel Hill, to hire Planning Directors and have assisted several transit agencies in hiring executives.

As you may remember Developmental Associates is not a traditional "headhunting" firm. Instead, we rely on more objective, systematic, and accurate methods to recruit, screen, and evaluate candidates that we call *Talent Identification and Assessment*. An article citing our work was published in *Supply and Demand Chain Magazine*.

<https://mail.google.com/mail/u/0/#inbox/FMfcgxwHNVvtbGIHfHMfNCGHBPqTDnG>

*In short, we provide you with much more detailed and in-depth information about the candidates than our competitors. **Our mission is to enable you to make the most informed decisions possible.***

Moreover, we have greatly improved our recruitment outcomes. Our success in identifying and hiring diverse candidates was on national display four years ago. Several television stations and news outlets recognized that North Carolina now has five female – African American Chiefs of Police in mid to large municipalities.

<https://www.newsobserver.com/news/local/article175431651.html>

Developmental Associates placed four of those Chiefs.

Additionally, we have helped several local governments enhance their diversity in key positions, such as Executive Director. During the last three years we helped Apex, NC; Chapel Hill, NC; Henderson, NC; and Statesboro, Georgia hire African American Managers.

Our approach has three goals with respect to recruitment, screening, and selection. After explaining those goals in this Executive Summary, we include a Scope of Services that details each of our services on pages 7-11.

First, we provide high quality candidates from a national and statewide recruitment base.

We provide four methods of recruitment.

1. We **target individuals** with whom we have worked directly. Having worked with thousands of executives through our consulting and training, we are well connected to leading local government candidates in the region. Moreover, during the last few years we have conducted numerous searches for local government executives and have established national and regional contacts through those processes. ***We have placed candidates from a variety of locations, such as Georgia, Idaho, Montana, California, Arizona, New York, Illinois, Florida, Washington DC, and Massachusetts.*** We would develop an attractive electronic brochure like the one at the end of this proposal to help draw the interest of candidates. This brochure not only provide information about the position, but also highlights the community and the organization.
2. We make **individual connections through social media**. We maintain lists of hundreds of local government executives that we can contact via email blasts and LinkedIn notices.
3. We know how to make the best use of the most widely referenced **professional journals and websites**. We can enhance the information provided to those sites by relying on a comprehensive study of the position and the organization that enables us to craft attractive, realistic, and comprehensive postings.
4. We have established a **national network** through our contract with NEOGOV, the number one HR application to governments nationwide. This service enables us to provide recruitment and applicant tracking solutions on a national level. We supplement that through our long-term affiliations with the International City Managers Association, and the North Carolina City and County Managers Association.

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

1. We develop a customized application that candidates must complete on-line. This application would be tailored to the specific challenges facing the DCHC MPO. In comparison to the traditional cover letter and resume, we are then able to match

candidates with the specific needs of the DCHC MPO. Moreover, we are then able to make “apples-to-apples” comparisons of candidates rather than trying to piece together disparate information from resumes that are each designed differently. As an additional bonus, we can then determine whether candidates are sufficiently motivated to fill out this unique application and whether they are tech-savvy.

2. We conduct intensive interviews with each of the top candidates (up to 15). We conduct these interviews using structured questions based on the needs of the DCHC MPO along with a detailed scoring system. The responses of each candidate are recorded and available to the Board for review.
3. Independent of the interview, we have one of our psychologists administer a psychological inventory called the **Emotional Intelligence Inventory (EQi 2.0)** – see page 12. This inventory, which is validated for employment, provides us with information on critical skills of the candidate, such as problem solving, assertiveness, interpersonal relations, and teamwork. This inventory is administered independent of the interview; in other words, the psychologist administers the EQ without knowing the interview results.
4. We have a third staff member administer an in-depth survey assessing candidate written challenges they would face as Executive Director. This survey is also independently scored. You then can view all of the above information on a spreadsheet prior to deciding which candidates to invite for even more in-depth assessment.

Third, we provide you the most in-depth and accurate information possible about the top candidates for this position to enable you to make the most informed decisions possible.

It is **essential** to rely on three common and very comfortable methods as a part of the selection process: 1) reviews of resumes, 2) reference and background checks, and 3) interviews.

Nevertheless, these are the three least accurate methods for determining the true

competencies of candidates and they are the key methods used by our competition! One of many reasons for the limitations of these methods is that they rely mostly on indirect or inferential data. For example, resumes tell us what the candidate has done, but not how well he/she has performed. References rely on third-party observations that have often been shown to be unreliable and based more on familiarity than skills assessment. Interviews, when conducted in a systematic and behavioral-based fashion, can reveal certain key attributes: knowledge, verbal communication skills, and judgment (when situational questions are included). *Interviews, however, are not able to directly verify other critical skills, such as budget analysis, conflict resolution, project planning, meeting or group facilitation, leadership style, problem solving, writing, or even presentation skills.*

Assessment center processes and certain psychometric tests are of greater validity (almost twice as accurate) than the traditional three methods alone. Developmental Associates promotes the use of assessment centers in conjunction with other methods. In these processes, we design exercises that simulate the responsibilities of the position, such as making

budget presentations, developing written project plans, facilitating staff meetings, conducting performance-based role plays, and resolving HR issues with individual departments to directly observe the skills of candidates. *We independently supplement this first-hand assessment with the Emotional Intelligence Inventory (EQi 2.0) to validate what we have observed in the assessment center process. This additive combination of two highly valid methods, coupled with traditional methods, greatly enhances the accuracy and depth of information we can provide you.*

*Please keep in mind, that these methods do not limit the discretion of the Board; instead, they enhance the quality of information you would have at your discretion in making screening, assessment and in final interview decisions. **Moreover, given the current limitations on social contact, we can conduct these services virtually, if you so choose. Obviously, you would want to interview your finalists in person, but can do so with an in-depth understanding of their strengths and weaknesses. Moreover, we can assist you in designing the final interview questions and scoring rubric.***

Thank you for considering our services. We would be pleased to partner with you to find an outstanding Executive Director.

Submitted by:



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

**PROPOSAL: DCHC MPO
RECRUITMENT, SCREENING, AND SELECTION PROCESS:
EXECUTIVE DIRECTOR**

October 29, 2021

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Samples of Recruitment Materials **Sent as attachments to
this proposal**

HIRE WITH CONFIDENCE PLEDGE

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

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

B: QUALIFICATIONS

FIRM NAME: Developmental Associates, LLC

ADDRESS: 510 Meadowmont Village Circle #299, Chapel Hill 27517

PHONE: (919) 812-0132

EMAIL: skstraus@developmentalassociates.com

LEAD CONSULTANT: Stephen Straus, Ph.D. - President

Firm History

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

- We are a North Carolina-based firm specializing in public sector, nonprofit and educational organizations. We have provided high-level services for 30 years.
- We are the only established local government search firm whose central office is located in North Carolina.
- We are HUB Certified by NC DOA as a predominantly female-owned business.
- We are located in Durham County.
- We employ a multi-disciplinary team on each project with each of us specializing in recruitment, selection, training, background investigations, and executive coaching. We are diverse in race and gender.

Our Recent Clients

Local governments are quickly recognizing the benefits of the new approach offered by Developmental Associates. During the last three years we have either completed or are in the process of working with the following local governments and universities:

- The City of Durham
- Wake County
- The City of Savannah, Georgia
- The City of Williamsburg, Virginia
- The City of Danville, Virginia
- The City of Suffolk, Virginia
- The City of Statesboro, Georgia
- The City of Greensboro
- The City of Winston Salem
- The City of Fayetteville
- The Town of Chapel Hill
- The Town of Duck
- The City of Elizabeth City
- The Town of Apex
- The City of Wilmington, NC
- The Town of Stallings

- The Town of Matthews
- The Town of Garner
- The City of Raleigh
- Durham County
- Sampson County
- Cleveland County
- Transylvania County
- Cumberland County
- The Town of Holly Springs
- The City of Wilson
- Duke University
- NC State University
- East Carolina University
- The Town of Wrightsville Beach
- The Town of Morrisville
- The Town of Zebulon
- Onslow County
- The Town of Waynesville
- The University of North Carolina at Chapel Hill
- UNC School for the Arts
- The Town of Mills River
- The City of Asheboro
- The City of Concord
- The Town of Rolesville
- Villanova University
- The City of Orangeburg, South Carolina
- The City of Isle of Palms, South Carolina

See Section G: References - for a more detailed summary of placements.

C. SCOPE OF SERVICES

DCHC MPO EXECUTIVE DIRECTOR

Directions: Below are the steps identified in the proposed Scope of Services, the dates when we could complete each step. This plan includes four meetings with the Board of Directors.

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	TIMELINE
<p>Step 1: Build a candidate profile and review and make suggestions to the job description by conducting a job and organizational analyses to identify expectations and competencies for the position with the following groups:</p> <ul style="list-style-type: none"> • MPO Board Search Committee • DCHC and City Staff • Others (such as DCHC TC Members, community members or partners) as identified by the Board Search Committee 	<ol style="list-style-type: none"> 1) Provides a foundation for defining the competencies sought in recruitment and in designing the selection process. 2) Builds stakeholder buy-in and perspective into the selection process. 3) Conducting a job analysis is essential for legal defensibility. 4) Conducting the organizational analyses identifies future challenges for a proactive Executive Director 5) We also can include surveys of the public and of DCHC MPO staff. 	<p style="color: red;">Day 1 (Requires Meeting with the Board Search Committee)</p>
<p>Step 2: Develop a recruitment strategy relying on multiple methods, as follows:</p> <p>a. Circulating and posting the job ad in leading professional journals, newspapers, and websites, including:</p> <ul style="list-style-type: none"> • AMPO – national and NC • APTA • NCPTA • ITE – national and NC • NARC • APA – national and NC <p>b. Targeted recruitment of leading candidates</p> <p>c. Posting on social media</p>	<ol style="list-style-type: none"> 1) Written ads for both print and online publications will typically generate the largest number of applications. 2) As the employing agency, the DCHC MPO would need to post the ads after they have been developed for any member-based organizations. (DA would post the ads and charge the DCHC MPO for those expenses, only; no additional fees.) 3) Developmental Associates would also develop an electronic recruitment brochure that highlights not only the position and flaunts the area as an excellent place to live and work. 4) We have direct access to several thousand local government executives across the country. We will send out a mass email to all of these executives, but also make direct contact with a number of those that we think would be a particularly good fit. 5) By targeting candidates and making individual contacts, Developmental Associates can supplement the candidate pool with executives with excellent credentials, both nationally and regionally. 	<p>Recruitment Days 5-35</p>

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	TIMELINE
<p>Step 3: Conduct initial (first) level screen of candidate applications/resumes</p> <ul style="list-style-type: none"> A media (Google) search (mentions of candidates in the news media) of the top candidates at this stage of the screening process 	<ol style="list-style-type: none"> 1) First level screening involves a structured process for evaluating resumes and supporting documents. We require all candidates to post their applications through NEOGOV to ensure they are responding to the specific requirements of the position and not just submitting a general resume. 2) The job analysis provides the basis for developing a structured screening guide to ensure consistent application of the selection criteria to each resume. 3) Narrow the field of candidates to a number that can be screened more intensively (through the secondary screening process described below). 4) Provides detailed and uniform information to the Board to enable you to make an informed decision about which candidates proceed in the process. 	<p>Send to Board Search Committee on Day 36</p> <p>Meet on Day 38</p> <p>(Requires closed meeting with the Board Search Committee)</p>
<p>Step 4: Conduct second level screening of candidates for the position. We employ two methods in the secondary screen. To ensure objectivity, a different member of our staff would conduct each method, and we keep a “firewall” between these methods. These four methods are as follows:</p> <ul style="list-style-type: none"> Video/phone interviews Electronic survey questions (short essays on accomplishments) 	<ol style="list-style-type: none"> 1) Such advanced screening methods are useful when there is a large group of qualified candidates, or the Board Search Committee is unfamiliar with many of the candidates. 2) The screening method would be driven by the job analyses (Step 1). 3) Upon completion the Board Search Committee would be ready to identify the finalists (up to 5) to invite to the final assessment process. 4) Provides detailed and uniform information to the Board Search Committee to enable you to make an informed decision about which candidates proceed in the process. 	<p>Send to Board Search Committee on Day 50</p> <p>Meet on Day 52</p> <p>(Requires closed meeting with the Board Search Committee)</p>
<p>Step 5: Design hiring process including Emotional Intelligence Testing (EQi – 2.0)</p>	<ol style="list-style-type: none"> 1) The hiring process should be valid (job related) to identify the best candidates. 2) The hiring process should provide an opportunity to assess the most critical competencies required for the position including the ability of the candidate to meet the primary challenges facing the DCHC MPO. 3) The hiring process should assess Emotional Intelligence (EI) as well as Cognitive Intelligence (IQ) and technical skills. The EQ-i 2.0 is an instrument that has been validated for employment. 	<p>By Day 52</p>

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	TIMELINE
<p>Step 6: Conduct skill-based exercises to evaluate the (up to 5) finalists</p> <ul style="list-style-type: none"> • Recruit assessors to evaluate the candidates (Assessors can be identified and approved by the Board) • Analyze EQI in-depth and correlate results with those of the skill-based exercises 	<ol style="list-style-type: none"> 1) The exercises should enable the DCHC MPO to assess the strengths and weaknesses of each candidate and to determine those candidates that have the skills to fill the position. Skills-based exercises elicit skills that are not observable in an interview. The exercises will be valid, reliable, and unbiased. 2) The rating criteria will be premised on the job analysis and designed using objective, behavioral-based rating criteria. 3) The types of assessors recruited depend upon the types of exercises the candidates would perform. Assessors might include local government executives from several states and (possibly) community members. 4) Assessors must complete a Statement of Confidentiality. Moreover, no single assessor will know the overall outcome of the process. That information is provided to the Board only. 5) Assessors will be trained on how to apply behavioral-based rating systems when rating candidates. 6) The candidates will be sent preparatory information and given thorough explanations in advance of the process. 	<p>Days 65-66 (The afternoon of Day 66 requires a closed meeting with the DCHC Board)</p>
<p>Step 7: Facilitate final evaluation process by assisting the Board in developing final evaluation strategies and structuring the panel interviews:</p> <ul style="list-style-type: none"> • Develop interview questions and evaluation process with the Board 	<ol style="list-style-type: none"> 1) Assists the Board in developing a systematic approach for evaluating the final candidates. 2) Provides expertise to the Board in making your evaluations and hiring decision. 3) Upon request Developmental Associates can provide certain interview questions to ask candidates as well as clarify rating criteria. 4) DA can also facilitate the final interviews 	<p>Day 67</p>
<p>Step 8: Facilitate thorough background investigations to fit with Durham City HR requirements.</p>	<ol style="list-style-type: none"> 1) Both legally and due to the sensitive and highly public nature of the position of Executive Director, we recommend thorough reference checks and background investigation. 2) Someone outside the DCHC MPO should conduct the background investigation to ensure confidentiality. 3) We would coordinate the investigations and report detailed findings to the Board. 	

STEPS IN THE RECRUITMENT, SCREENING, AND SELECTION PROCESS	PURPOSE OF THE PROPOSED STEPS	TIMELINE
<p>Step 10: Provide executive coaching to the successful candidate and to any internal candidate</p> <ul style="list-style-type: none"> • Review the challenges facing the community and organization • Analyze the results of the selection process • Analyze the findings of the EQi • Develop a plan of action • Developmental feedback provided to internal candidates who are not selected. This includes a review of EQi and assessment center results 	<ol style="list-style-type: none"> 1) The assessment process provides rich information suitable for executive coaching. 2) The new Executive Director will be facing exciting but formidable new challenges. He/she can benefit from professional guidance in developing a plan of action to meet those challenges successful. 3) Feedback to internal candidates not selected often helps in their personal development and acceptance of the decision. This also paves the way for greater support of the selected candidate by incumbents. 	TBD

EMOTIONAL INTELLIGENCE FACTORS***SELF-PERCEPTION REALM**

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

SELF-EXPRESSION REALM

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

INTERPERSONAL REALM

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

DECISION MAKING REALM

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

STRESS-MANAGEMENT REALM

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

EQ-i 2.0, Multi-Health Systems (2011), All Rights Reserved

Adapted from *The EQ Edge*

Steven J. Stein, Ph.D. and Howard E. Book, M.D.

Third Edition (2011)

D: COST**PROPOSED FEES FOR THIS PROJECT**

BASIC FEE	ADDITIONAL OPTIONS (Including Maximums)
\$23,500	<ul style="list-style-type: none"> • EQi- Analysis @ \$200 per candidate (up to 5) • Coaching and Feedback @ \$250 for the successful candidate • Background @\$2250 per candidate* • Hourly fee for additional work requested by the DCHC MPO @\$200 per hour

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

The maximum total fee would be \$24,500 (excluding coaching). We charge no other fees or expenses (unless the DCHC MPO wants DA to post and pay for the recruitment ads).

Litigation support, expert witness testimony, and depositions would be billed at an hourly rate of \$250.00 per hour unless Developmental Associates is responsible for losing a grievance or legal case. In that event, there would be no charge for litigation support.

E: ORGANIZATION AND STAFFING

Steve Straus would be the lead consultant on this project. He would team with Heather Lee, Janice Jackson, Joe Durham, and Holly Danford.

Steve Straus is President and Founder of North Carolina-based Developmental Associates. He earned his Bachelors' Degree from the Wharton School of Business at the University of Pennsylvania, a Master of Public Administration from the University of North Carolina at Chapel Hill and a Ph.D. from Duke University in Political Science. Dr. Straus is a former Assistant City Manager in Southern Pines. Steve has been a long-time member and frequent presenter with the NC City and County Managers Association. For 26 years he has taught in the Master of Public Administrative Programs at NC State University and UNC Chapel Hill and has served on the faculty at the School of Government at UNC-Chapel Hill. He has published in the leading public sector journals.

Heather Lee is a Partner with North Carolina-based Developmental Associates where she has worked since 2004. Heather earned an M.S. and a Ph.D. from North Carolina State University in Industrial/Organizational Psychology. Dr. Lee earned her undergraduate degree in Psychology with a minor in Social Work at Florida State University. Heather, a Certified Senior Professional in Human Resources (SPHR), is an organizational consultant specializing in the nonprofit, governmental, and educational sectors.

As a passionate advocate for assessing and developing emotional intelligence in the workplace, Heather blends academic training and evidence-based solutions with a practitioner approach to leadership assessment and development. Areas of practice include the Talent Identification areas of executive recruitment and selection, and Talent Development areas of coaching, training, executive leadership, and team development using a variety of tools.

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

Joe Durham has worked in leadership positions for local government (city and county), state government, and the private sector. He retired from Wake County Government where he worked for 13 years serving as Deputy County Manager and Interim County Manager.

He previously worked as County Manager for Edgecombe County and in various leadership roles with the City of Sanford, Richmond County, and the City of Rocky Mount. He has also worked with the Wooten Company (engineering, planning, and architecture) and the State of North Carolina (Department of Natural Resources and Community Development). Mr. Durham earned a BS from East Carolina in Urban and Regional Planning and has also done graduate work in local government management at ECU and UNC-Chapel Hill.

Joe retired in 2016 as Wake County Deputy Manager. Joe has substantial experience (over 30 years) and connections in local government.

Janice Jackson has served as City Manager of Albany, GA, and Administrator of the consolidated Augusta, GA government. She also worked as a General Manager/Assistant County Manager in Mecklenburg County, NC. She was the first student at the College of William and Mary to pursue the interdisciplinary major in Public Policy, completing it with a concentration in Urban Policy. Later, she was a recipient of the Alfred P. Sloan/Association for Public Policy Analysis and Management Fellowship and earned a Masters' Degree in Public Policy with a concentration in Management from Duke University.

Holly Danford is the Client Services Manager. She has worked in various capacities with DA since 2013. As Client Services Manager, Holly works with employers and candidates to make sure their needs are met, questions answered, and excellent customer service is delivered on a consistent basis. She takes the lead in analyzing the qualifications of candidates during the screening processes.

Dr. Danford has her BA in Political Science, Master's in Public Administration and Ph.D. in Public Administration, all from NC State University. Holly has worked for almost 20 years in federal, state, and local government capacities. She is a US Air Force veteran and teaches State and local government as an Adjunct Professor at North Carolina State University. Her background is in Public Health and Veterans Affairs.

We would not contract out any services.

MWBE UTILIZATION

NAME	ROLE WITH DA	RACE	GENDER
Stephen Straus	President	White American	Male
Heather Lee	Partner	White American	Female
Janice Jackson	Senior Consultant	Black American	Female
Joe Durham	Senior Consultant	Black American	Male
Holly Danford	Client Services Mgr	White American	Female

F: INSURANCE

Commercial General Liability Insurance: "Occurrence" basis, including products and completed operations, property damage, bodily injury, and personal & advertising injury with limits **\$1,000,000** per occurrence and **\$2,000,000** aggregate.

G: REFERENCES**REFERENCES**

<p>Town of Chapel Hill Town Manager Maurice Jones (919) 968-2743 mjones@townofchapelhill.org Also feel free to contact Mayor Pam Hemminger or any one of the Town Council members. Mayor Hemminger’s phone is: (919) 968-2714 <i>DA has helped the Town hire several department head positions and also with succession planning. We recently work with the Town to hire Maurice Jones as Manager. We just completed a process in which we helped the Town Council hire a new Town Attorney.</i></p>	<p>City of Durham Retired City Manager Tom Bonfield tjbonfield@gmail.com (919) 323-9437 Mayor Steve Sewell Steve.Schewel@durhamnc.gov (919) 560-4333 <i>DA assisted Tom in hiring a Deputy Manager and Assistant Directors in Parks and Recreation. We have also helped Durham hire outstanding Police and Fire Chiefs and other department directors. We also worked with the City Council this year to select their new Manager, Wanda Page.</i></p>
<p>Wake County County Manager David Ellis David.Ellis@wakegov.com (919) 856-6160 <i>We worked with Mr. Ellis over the last twelve months to hire two Deputy Managers – the Chief Community Vitality Officer and the Chief Innovation and Information Officer as well as the Human Services Director.</i></p>	<p>Cumberland County County Manager Amy Canon (910) 678-7723 acannon@co.cumberland.nc.us <i>DA recently assisted Cumberland County in hiring two Assistant Managers and several other department directors including Health Director. Cumberland County is one of our clients that uses us for all their executive search processes.</i></p>
<p>City of Savannah Mayor Van Johnson MayorJohnson@savannahga.gov (912) 651-6444 HR Director Jeff Grant (912) 541-3218 jgrant01@savannahga.gov <i>We have partnered with the City of Savannah to hire their new City Manager. We also assessed candidates for Chief of Police, and helped hire its IT Director, Fire Chief, Assistant Chiefs of Police (2) and Assistant Fire Chief.</i></p>	<p>City of Danville, Virginia Manager Ken Larking klarking@danvilleva.gov (434) 799-5100 <i>DA worked with Mr. Larking to hire a Chief of Police in 2017 and a Fire Chief in 2019. We are currently working with Danville to hire an Economic Development Director, a Transit Director and a Planning Director.</i></p>
<p>City of Greensboro Interim Manager Chris Wilson (336) 373-2002 christian.wilson@greensboro-nc.gov <i>DA has assisted in Greensboro in hiring several assistant managers, department directors and higher-level staff. We helped hire David Parrish as an Assistant and the Council valued his work enough to appoint him as Manager about three years ago.</i></p>	<p>Town of Apex Manager Katy Crosby (919) 249-3400 catherine.crosby@apexnc.org <i>In 2021 we worked with the Town to hire Ms. Crosby as Town Manager as well as the Chief of Police. Both are the first African Americans to hold those positions in Apex. We have also helped hire the Assistant Town Manager, Water Resources Director, Deputy Police Chief, and Assistant Fire Chief.</i></p>

<p>The City of Charlotte Retired Police Chief Kerr Putney (704) 650-0367 putneyk@hotmail.com <i>DA helped Charlotte hire two Assistant City Managers, and Corporate Communications Director. Moreover, we conduct the promotional processes for the Charlotte-Mecklenburg Police Department.</i></p>	<p>City of Fayetteville Manager Doug Hewitt dhewett@ci.fay.nc.us (910) 309-0284 <i>DA assisted Fayetteville in hiring its Police Chief, Director of Engineering and Infrastructure, and a Human Relations Director. This year we helped them hire an Assistant City Manager and Economic and Community Development Director.</i></p>
<p>City of Winston Salem Manager Lee Garrity (336)747-7380 leeg@cityofws.org <i>DA assisted Winston Salem in hiring its Chiefs of Police and Fire. We have also worked with them to hire several other department directors. This year we have assisted the City in hiring two Assistant City Managers.</i></p>	<p>City of Reidsville Mayor Jay Donecker (336) 342-5093 jay.donecker@gmail.com <i>DA has worked with the City to hire two City Managers as well as several department directors. We are currently working with Reidsville to hire a Chief of Police.</i></p>
<p>Town of Garner City Manager Rodney Dickerson (919) 218-3764 rdickerson@garnernc.gov <i>Feel free to contact any of the Town Council. The Town contracted with DA to hire its Town Manager. We have also helped them hire the Police Chief, HR Director, and Economic Development Director.</i></p>	<p>City of Williamsburg, Virginia Manager Andrew Trivette atrivette@williamsburgva.gov (757) 220-6100 Mayor Paul Freiling pfreiling@williamsburgva.gov (757) 220-6101 <i>DA partnered with Williamsburg to hire a Manager in 2018 and a Police Chief in 2017.</i></p>
<p>City of Concord Manager Lloyd Payne paynel@concordnc.gov (740) 920-5215 <i>DA worked with the City of Concord to hire Mr. Payne in 2018.</i></p>	<p>Town of Matthews Manager Hazen Blodgett hblodgett@matthewsnc.gov (704) 708-1230 <i>We have worked with Mr. Blodgett to hire an outstanding Assistant Town Manager and several key department heads, including Police and Fire Chief.</i></p>
<p>Town of Morrisville Manager Martha Paige (919) 463-6150 mpaige@townofmorrisville.org <i>DA worked with a split Council to arrive at an enthusiastic and unanimous decision to hire its City Manager – Martha Paige in 2014. We have recently assisted Morrisville in hiring a Finance Director, Chief of Police, and Fire Chief</i></p>	<p>Onslow County Assistant Manager Sheri Slater sheri_slater@onslowcountync.gov (910) 389-1851 <i>DA has assisted Onslow County in hiring several department directors including Health and Social Services Director. We helped them hire Sharon Russell as Deputy Manager. Ms. Russell is now the County Manager.</i></p>
<p>Cleveland County Manager Brian Epley brian.epley@clevelandcounty.com (704) 484-4800 <i>DA partnered with Cleveland County to hire its Emergency Services Manager, Social Services Director and Health Director.</i></p>	<p>Transylvania County Former Chair Mike Hawkins (828) 553-2863 <i>DA assisted the County in hiring a Manager in 2014 and Social Services Director in 2015 and Finance Director in 2018.</i></p>

<p>City of Statesboro, Georgia Mayor Johnathan McCollar jonathan.mccollar@statesboroga.gov (912) 764-5468 <i>DA worked with the City of Statesboro to hire a Chief of Police in 2016 and to hire a City Manager in 2019. We also helped the City hire a Human Resources Director in 2019.</i></p>	<p>Town of Southern Pines Manager Reagan Parsons (910) 692-7021 Parsons@southernpines.net <i>We have worked with Reagan to hire a number of department directors and assistant managers.</i></p>
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STEPHEN K. STRAUS, Ph.D.

BUSINESS ADDRESS:

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Chapel Hill, NC 27517
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phone: (919) 812-0132

EDUCATION:

Ph.D. in Political Science, December 1986

- Duke University, Durham, North Carolina

Master of Public Administration, 1980

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

B.S. in Economics, 1972

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

B.A. in Sociology, 1972

- The University of Pennsylvania, Philadelphia, Pennsylvania

PROFESSIONAL EXPERIENCE:

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

Projects include:

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

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

Courses include:

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

FACULTY APPOINTMENTS

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

Courses Taught:

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

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

OTHER WORK EXPERIENCE

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

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

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

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

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

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

PUBLICATIONS:

Dissertation:

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

Articles:

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

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

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

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

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

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

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

Co-authored book chapter:

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