



## Office of the City Attorney

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### Memorandum

TO: Mayor & Commissioners  
FROM: Shawn D. Smith, City Attorney  
RE: Recommendations from City Manager Screening Committee  
DATE: 26 April 2012

#### Mayor and Commissioners

The Screening Committee met on Tuesday April 17<sup>th</sup> following your special meeting on the 16<sup>th</sup>. In conjunction with Colin Baenziger, they narrowed the list of candidates to thirteen at the time. There were distinct differences in categories of candidates.

Eight candidates filed timely applications and were determined to meet the minimum qualifications specified by the City Commission. Those candidates are John D'Agostino, Ed Green, Gary La Venia, Craig Lonon, Phillip Smith-Hanes, Andrew Mair, Susan Stanton, and Bob Vitas. The Committee unanimously voted to move these candidates forward for and in depth review.

Two candidates were determined not to have met the April 13, 2012 deadline, but were recommended to the Commission by the Committee for consideration. Those two candidates are Don Craig and Paul Shew. The Committee unanimously voted to recommend to the Commission that these candidates be allowed to move forward in the process.

Three candidates were determined to have timely applied, but lacked the minimum qualifications. Those three applicants are Thaddeus Cohen, Ken Davis and Margaret Romero. The Committee unanimously voted to recommend that the City Commission allow Mr. Cohen to move forward in the process. The vote of the Committee was 4-3 in recommending to the Commission that Mr. Davis and Ms. Romero progress in the process.

On Wednesday April 18, Don Craig and Andrew Mair both asked that their names be removed from further consideration. On April 21 Mr. Smith-Hanes also withdrew his application for the position. You may have also seen the media report on one of the other candidates who reportedly said he was merely testing his worth and did not plan to travel to Key West to pursue the position.

The Committee would like your input on whether to move Mr. Shew forward given his untimely application, and whether you would like them to consider Mr. Cohen, Mr. Davis and Ms. Romero despite their lack of specified qualifications. I plan to address these items under my report at your May 1, 2012 Commission meeting. I've also attached the resumes of the 10 remaining candidates for your ease in reference.

I remain available to answer any questions you may have in advance of the meeting. Thanks for your time.

  
Shawn D. Smith

**John O. D'Agostino**

175 Balcom Street, Mansfield, MA 02048

508-339-8057 (home)

508-922-7076 (cell)

jdagostino92257@me.com

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**Profile:**

**Strong background and extensive experience in public management with strengths in fiscal planning, budget preparation/analysis as well as contract negotiations. An innovative problem solver with a vision towards moving the organization forward. A proven track record in motivating staff and decision makers to accomplish organizational mission, goals and objectives.**

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**Accomplishments:**

- Money Magazine named Mansfield Massachusetts one of the top 100 communities in the country to live and work in 2005.
  - Recipient of the Tri-Town Chamber of Commerce President's Award in 2007 for attracting new and emerging businesses and industries to Mansfield.
  - Implemented a new trash program in Abington saving \$321,000
  - Negotiated Health Care plan design changes in Abington saving \$312,000
  - Successfully encouraged new companies to relocate to Abington and Mansfield.
  - Samsonite Luggage located World Headquarters in Mansfield generating over \$5 million a year to the local economy.
  - Successfully balanced fourteen municipal budgets ranging from \$42 million (Abington) to \$82 million (Mansfield).
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**Career History:****Town of Abington Massachusetts***Apr. 2010 – Present****Town Manager***

- Chief Administrative and Financial Officer, Town Population 16,400.
- Appoint Full-Time Departments Heads and set administrative policy for 20 departments. Responsibility for a total of 95 employees.
- Prepare, analyze, balance and manage a municipal budget totaling \$48 million dollars.
- Present a balanced Town Manager's Budget to the Board of Selectmen, Finance Committee and Town Meeting
- Collective Bargaining Agent responsible for all union and non-union contracts.
- Chief Procurement Officer for the purchase of all Goods and Services bids and contracts.
- Prepare and submit five-year capital outlay budget for the Town of Abington.
- Keep the Board informed on all operational, financial and personnel matters before the town.

**Town of Mansfield Massachusetts***Dec. 1997 – Dec. 2009****Town Manager***

- Chief Executive and Administrative Officer, town population 25,000.
- Appoint, manage and set administrative policy for 24 department heads with responsibilities for a total of 215 plus employees.
- Prepare, analyze, balance and present a total municipal budget of more than \$84 million to the Board of Selectmen, Finance Committee and Town Meeting.
- Collective Bargaining Agent responsible for all contract negotiations.
- Chief Procurement Officer for purchases of all goods and services.
- Establish long and short-term goals for the purpose of realizing the vision set forth in the master plan for the town.
- Serve as a member of the Capital Improvements Committee.
- Seek and create opportunities to successfully manage the unprecedented growth of the town.
- Address residential questions, concerns and comments on a variety of topics and issues.

**Town of Blackstone Massachusetts***Jan. 1995 – Dec 1997*

***Town Administrator***

- Administrative Officer for the Town of Blackstone with a population of 8,200.
- Supervise appointed department heads.
- Prepare fiscal budget of 25 million and present to the Board of Selectmen and Finance Committee to be finalized for presentation at town meeting.
- Chief Procurement Officer for purchases of all goods and services for the town.
- Assist in Collective Bargaining Negotiations for final approval by the Board of Selectmen.

**City of Springfield, Massachusetts***Feb 1989 – Jan 1995****Municipal Grants Manager***

- Develop, compose, coordinate and submit municipal grants for implementation.
- Secure Community Policing Grant Funds at both state and federal levels
- Coordination and administration of a team of grant writer from various departments within the city.
- Serve on the Board of Police Commissioners for the City of Springfield with a population of 125,000.

**Education:**

M.A. Public Administration, University of Hartford	<i>June 1993</i>
M.A. Human Resource Dev. American International College	<i>May 1990</i>
B.A. (minor Political Science-Maxwell School of Citizenship)	
Syracuse University	<i>May 1980</i>

**Affiliations and Membership:**

- **Massachusetts Municipal Manager's Association**
- **Massachusetts Municipal Personnel Administration**
- **ICMA (International City/County Management Association)**
- **Past Chairman of the Board of the Southeastern Massachusetts Health Group**

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**References:**

- Tom Korbus, President Samsonite Luggage 575 West Street, Mansfield MA 02048. 508-851-1400
- Chris Aiello, Chairman Abington Board of Selectmen 11 Hunts Pond Lane, Abington MA 23451-2178. (Cell) 781-248-4439
- Selectmen Sandra Levine, 20 Walnut Street, Mansfield, MA 02048. 508-339-8474
- State Representative Fred Jay Barrows, 215 North Main Street, Mansfield MA 02048. 508-339-7260 extension 201
- Mike Franey, Member, Abington Board of Selectmen 726 Washington Street, Abington, MA 02351-2022 (Home) 781-871-1154

**Ed Green**

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1005 Hickory Drive  
Rifle, CO 81650

Home: 970.625.5452  
Cell: 970.456.8605  
Email:  
sagebrushbend@msn.com

### Highlights

- Over two decades of experience as a senior level executive in the public and private sectors
- Process re-engineering experience resulting in staff reductions of 33%.
- Extensive project management experience.
- Proven track record leading organizations to high levels of achievement, including national awards.
- Knowledge and application of strategic planning concepts.

### Experience

**County Manager**, Garfield County, Glenwood Springs, CO 1998 – 2012  
Directed the activities of a 250-person organization involved in all aspects of the operation of Garfield County including Administrative functions, Road and Bridge Operations, Planning and Zoning, Engineering, Facilities Management, Community Corrections, the Public Health Program, Human Services, and Airport Operations.

Accomplishments include:

- Published first detailed line item budget in county history and established first ever financial policies and procedures and performance tracking. In 2010, won two national awards for budgeting and financial reporting and one in 2011 for financial reporting.
- By emphasizing accumulation of wealth as a county wide financial goal, realized a seven fold increase in total fund balances in thirteen years from \$15 million to \$118 million.
- Consistently held labor and benefit costs in check (ranging from 27 to 32% of total costs) over the past 6 years.
- Replaced/upgraded all County software/hardware including adding new CAD/GIS systems. Converted to a new financial system, and linked with new state human services data systems. Developed a very popular County Web Page with over one million hits per year. Networked county offices for better information transfer and management.
- Established the first Human Resources Department for the County. Conducted the first salary survey and introduced a web-based performance pay system. Instituted a comprehensive employee training program, and restructured the entire benefits program.
- Implemented a strategy to target the airport and surrounding area for development as an economic engine for Western Garfield County.
- Obtained FAA approval for a \$47 million project to improve the county's runway rating from BII to DII. Project was completed in late 2010 with resounding accolades from residents and community leaders.
- Introduced a comprehensive safety culture within the county that has significantly reduced injuries and cut costs.

- Completed financing, design, contract placement, and construction of a \$4 million Road and Bridge facility, a \$15 million detention center, a \$5 million administrative facility, a \$3 million human services facility plus a \$2.5 million addition to that facility, a \$1.5 million dollar events center, \$1.5 million community corrections facility, \$9 million justice center, \$2.6 million airport operations facility, \$3.5 million Sheriff's Annex, and numerous multi-million dollar airport improvements. Well over 90% have been completed on schedule / within budget.
- Helped to create a county-wide emergency management program focusing on improvements to emergency communications, LEPC capabilities, incident command structures, multi-agency coordination and recovery.
- Assured compliance with EPA regulations regarding closure / post-closure at County landfill and environmental remediation of contaminated areas under a Road and Bridge facility. Spearheaded the obtainment of a \$2.8 million grant from the Department of Energy to construct a water line to deal with area institutional controls.
- Transformed the county landfill into a profit center through an aggressive out of county rate structure, extensive recycling of metals, and an improved collections process. Increased fund balance from \$500k to \$5 million.
- Improved communication and cooperation within the county and with the community through various approaches including monthly round table discussions with a cross section of employees, focus groups with residents, a monthly full color newsletter to staff, and regular meetings with city managers.
- Directed a county wide year long initiative to restructure all senior programs in the county to assure better support and commitment from the cities and to place these programs on solid financial footing.
- Have had extensive experience in public relations working with the press and providing interviews to regional TV News channels.
- Using various customer advocacy techniques, have empowered employees to handle customer concerns and, when possible, resolve them to the customer's satisfaction. One example is implementation of a "hot shot team" concept to address resident concerns on roads rapidly. Have also led discussions with citizens to resolve issues of concern brought forth by a particular customer base. One example is resolution of turf specifications for our new riding arena to everyone's satisfaction.
- Coordinated the development of a renewable energy initiative with all county communities acquiring \$2 million in DOE grant funds and creating 6 separate programs to direct improvement dollars to residents and community facilities.
- Spearheaded a team approach to economic development that accomplished key initiatives including development of a strategic focus, branding, and marketing, restructuring of land use codes to make the county more attractive to the business community, emphasis on regionalization of economic development initiatives throughout the county, reinforcement of our commitment to the success of existing industries including oil and gas, and implementation of a focused marketing program to attract primary jobs.

Fluor Corporation, Cincinnati, OH

1996 - 1998

**Project Vice President & Director, Contracts and Asset Management**

Directed the activities of a 125-person organization placing \$150 million annually involved in prime contract / fee management, major subcontracting, purchasing, shipping, receiving, warehousing and property management at a key Department of Energy Environmental Remediation site.

Accomplishments included:

- Reduced cycle times through implementation of an extensive P-card system (including data system).
- Implemented a new process for developing the semi-annual fee plan that resulted in millions of dollars of additional revenue for the company.
- Reconfigured stock into project focused sub-stores. Increased turn ratio from 0.6 to 2.22 in 1.5 years.
- Spearheaded an improved staff augmentation process eliminating time-consuming involvement by procurement.
- Developed and implemented a balanced scorecard assessment system.
- Increased emphasis on acquisition planning and new procurement methods emphasizing a “best value” approach
- Converted a centralized organization to distributed, focused teams residing in close proximity to their customers.
- Received the *Minority Business Opportunity Committee Organization of the Year Award (1997)* and the *Cincinnati National Minority Supplier Development Council Corporation of the Year Award (1997)*.

**Procurement Manager**

National Renewable Energy Laboratory (NREL), Golden CO

1990 – 1996

Directed the activities of a 90-person organization responsible for placement of research agreements, AE and construction contracts, system contracts, and service contracts and miscellaneous purchases totaling \$140 million annually. Also directed the activities of support functions including contract administration, closeout, shipping, receiving and stores and property management.

Accomplishments included:

- Achieved dramatic reduction in cycle times using bank cards for small value purchases, systems contracts for common requirements, a streamlined RFP, selection and evaluation process for Research and Development subcontracts and simplified purchasing methods for large value PO's.
- Implemented the “100 foot circle” concept to support customers by placing self-directed work teams with the research community they support.
- Increased warehouse turn ratio from 0.5 to 3 in less than two years.
- Developed a comprehensive balanced scorecard performance measurement system.
- Assured complete compliance with DOT regulations through development and implementation of a comprehensive transportation safety manual and SOPs.



- Chaired laboratory-wide process improvement team initiatives for chemical mgmt., warehouse ops. and team rewards.
- Successfully passed external system reviews for procurement, property management and laboratory safety.
- Received 1993 SBA "Award of Distinction" in recognition of an outstanding small business program, the 1994 "Corporation of the Year" from Minority Enterprises, Inc and the SBA's 1995 "Dwight D. Eisenhower Award" a Presidential Award recognizing NREL as having the best socioeconomic program in the nation.

**Material Manager, Hughes Aircraft, Aurora CO**

1989 – 1990

Directed a 25-person organization responsible for delivery of critical components just in time to meet production requirements. Organization consisted of a subcontracts group, purchasing, material control, shipping, receiving, stores and property management functions.

Accomplishments included:

- Conducted process mapping of internal organizations and of customer / supplier interfaces.
- Developed key metrics for analysis of processes.
- Established JIT systems contracts for commodities including electronic components, sheet metal, and boards.
- Increased total dollar throughput of the organization by 1.5 times with a concomitant 10% staffing reduction.
- Passed AFPRO Procurement and Property Management Reviews with "flying colors".

**Rocky Flats Nuclear Weapons Plant**

Broomfield CO

1972 – 1989

**Department of Energy Warranted Contracting Officer**--Positions held included **Procurement Officer, Budget Analyst, Contract Negotiator, Chief, Contracts Section & Program Analyst.**

Responsibilities included:

- Coordinated the plant strategic planning process and helped develop the plant Productivity Enhancement Process which emphasized lean manufacturing techniques
- Developed the plant capital budget including construction, equipment, and data systems
- Negotiated key DOE contracts (\$50 to 100 million per year) including AE, construction, support service, interagency agreements and grants.
- Supervised surveillance of operating contractor including conduct of CPSR's and Pre-Award Reviews as well as oversight of the plant industrial relations program (*union agreements*).
- Served as the project lead for the transfer of the entire DOE wind energy program to NREL
- Served on a DOE wide project team to recommend sighting options for a proposed consolidated nuclear weapons facility
- Served on a project team to acquire a critical high energy rate forging plant facility from private industry and integrated it into Rocky Flats operations

- Served on a year long safety analysis review team initiative evaluating over 100 separate plant functions (*nuclear and Non-nuclear*), to assure compliance with stringent safety standards for nuclear facilities
- Acted as a troubleshooter, solving critical plant wide problems

**Other Experience**

- Member of County Health Pool Board: 1999 to 2003,
- Chairman of the Thornton Career Service Board: City of Thornton 1979-1985,
- Member of Board of Directors for Denver Area Minority Enterprise, Inc.: 1993-1995,
- Senior MP (*E-5*) – U.S. Army Reserves: 1971-1977,
- Production Planner – General Cable Corporation: 1971,
- Loaned Executive – United Way: 1973

**Education**

**M.B.A.**, (3.6 GPA) Colorado State University, Fort Collins, Colorado;

**B.S.**, *Production Management*, (3.05 GPA) University of Colorado, Boulder, Colorado

**Clearances Held**

U. S. Army Secret

Department of Energy “Q”

National Security Agency “EBI”

**Personal Information**

Married to my wife for over 35 years with three grown children and six grand children

Hobbies include weight lifting and aerobic exercise, hiking, snow shoeing, biking, and photography

*Gary F. La Venia, 52 E. Park Avenue, Maple Shade, NJ 08052*

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E-Mail: [gfl5154@comcast.net](mailto:gfl5154@comcast.net)

### Summary

With more than twenty-seven (27) years of government experience at the executive level, I am a proven leader with demonstrated skills in organizational development, management, finance, budget and human resources. I am experienced in management, policy development, review, interpretation and control of objectives, policies and procedures;

- Extensive management experience of government organizations on county and local level
- Strong leadership skills
- Proven organizational development ability
- Excellent communication/public relations skills
- Human Resource responsibility/labor relations & contract negotiations
- Proven Innovator
- Extensive finance & budget experience
- Certified Government Finance Officer
- Achievement Oriented
- Long standing membership on a number of State, County & Local Boards, Commissions, Committees & service organizations
- Employ a team approach to management

### Relevant Experience

#### **Township Manager, Township of Maple Shade, NJ**

**March 2010 – Present**

The Township of Maple Shade, located in Burlington County NJ, with a population of over 20,000 the municipality has an operating budget of over \$20,000,000; it has 100 municipal employees to include three organized labor groups. The Township, which is approximately 5 square miles, operates a Municipal Water and Wastewater Treatment utility. In addition to my duties as Township Manager I am the Executive Director of the Utility which has a budget in excess of \$14,000,000. I am also the Emergency Management Coordinator for the Township with the responsibility of working in concert with State, County and local officials to insure the necessary planning, precautions, and contingencies are in place to deal with and all emergent situations to include man-made and natural disasters.

#### **Duties and Responsibilities:**

- CAO of the Township of Maple Shade and the Maple Shade Utility Authority
- Responsible for the overall management of the day to day operation and business affairs for the municipality
- Executive Director of the Water and Waste Water Management Utility
- Manage all matters pertaining to finance and budget, purchasing, personnel administration, contract negotiations and administration.
- Possess all executive and administrative powers pertaining to personnel and related issues.
- Interact on a regular basis with federal, state and local officials, community leaders and all others doing business with the municipality
- Prepare and oversee both the Municipal and Utility operating and capital budgets
- Emergency Management Coordinator

**Achievements**

- ❖ Instituting new updated web-site
- ❖ Creating and installing new energy efficient, green HVAC and lighting for municipal complex to include solar arrays on several Township facilities
- ❖ Expanding and updating computer hardware, software and services
- ❖ Expanding television access to council meetings for local residents
- ❖ Instituting customer service training for municipal employees

**Director of Burlington County Improvement Authority  
Burlington County Shared Service Coordinator  
Burlington County Bridge Commission, Palmyra, NJ**

**February 2004 – February 2010**

Burlington County, New Jersey is 850 square miles, the largest county in the State; it extends from the Delaware River to the Atlantic Ocean. The population is approximately 550,000 residing in 40 municipalities. Once, almost 100% farmland, roughly one third of the region is now extensively developed. Growth occurred at a tremendous rate. The remaining area is predominately farmland and pinelands preservation area; the most farmland and open space of any county in the state. I am the first Director of the Burlington County Improvement Authority as such I was responsible for proposing, organizing and implementing all activities of both the Improvement Authority and the Burlington County Shared Services Forum

**Duties and Responsibilities:**

- Direct all activities and operations of the Improvement Authority
- Intricately involved with development and redevelopment projects in Burlington County
- Develop and oversee financings for governmental, non-profit & certain, specific private sector entities
- Manage a team of legal & financial consultants
- Work closely with federal, state, county, local government officials, business, community leaders' & citizen groups on a regular basis.
- Handle special projects, special events, orchestrate, organize and conduct varied meetings
- Direct and coordinate ongoing shared service & consolidation efforts of local governmental entities in the County primarily through the Burlington County Shared Services Forum which I established and oversee as the County Shared Services Coordinator
- Interact regularly with federal, state, county and local officials and community stake- holders

**Achievements**

- ❖ First Director of Burlington County Improvement Authority
- ❖ Formed the Burlington County Shared Services Forum recognized as one of the most innovative organizations of its kind in the State
- ❖ Organized and directed \$400,000,000 in pooled government lending's and \$100,000,000 in private sector conduit lending's to date, managing a team of professionals involved in the process to include attorneys, financial consultants, other financial professionals and government officials
- ❖ Directly involved in the formation of an elected the first vice-president of the New Jersey Shared Services Coordinators Association
- ❖ Oversaw the initiation and implementation of the Burlington County Storm Water Management Plan, Burlington County Energy Conservation Plan, and Rancocas Creek Clean-up ( a model project for the entire State)

- ❖ Published in the NJLOM Magazine, speaker at the NJ Government Finance Officers Association Conference, the New Jersey Association of Counties, and the New Jersey League of Municipalities Annual Conferences
- ❖ Burlington County Chamber of Commerce Voice of Business Award for Economic Development

**Township Manager, Township of Riverside, NJ**

**July 1986 – February 2004**

The Township of Riverside located on the Delaware River in Burlington County NJ has a population of over 15,000 with a budget of over \$20,000,000; it has 80 municipal employees to include two organized labor groups. The Township is 2.0 square miles making it the one of the most densely populated municipalities' in South Jersey. It is one of the most ethnically diverse communities in the county. The Township also has a Municipal Wastewater Treatment facility overseen by the municipality.

**Duties and Responsibilities:**

- Responsible for the overall management of the day to day operation and business affairs for the municipality
- Manage all matters pertaining to finance and budget, purchasing, personnel administration, contract negotiations and administration.
- Interacted on a regular basis with federal, state and local officials, community leaders and all others doing business with the municipality
- Deputy Treasurer worked closely with the CFO to insure efficient and effective fiscal management
- Purchasing Officer- Directed all purchasing for the Township
- Certified Municipal Welfare Director and Registrar of Vital Statistics

**Achievements**

- ❖ Reduced health benefit costs by 40% while maintaining the same level of coverage for all employees
- ❖ Overhauled and reinvigorated a very poor Public Works Department into an effective and efficient group of motivated employees
- ❖ Substantially reduced other insurance costs for the municipality by becoming one of the founding communities of the Burlington County Joint Insurance Fund for which I served as the first secretary and subsequently chairperson for 8 years
- ❖ Installed the first computer network for servicing every department in the organization thereby creating efficiency, reducing workload, and increasing productivity of the workforce which increased and improved services offered to our residents
- ❖ Instituted the first township newsletter
- ❖ Named Chairman of the NJ League of Municipalities Legislative Committee on Pension, Personnel, & Elections Committee

**Executive Assistant/Environmental Administrator  
Burlington County Health Department, Mt. Holly, NJ**

**February 1984 - July 1986**

The Burlington County Health Department provides complete health and environmental services to all 40 municipalities in the County of Burlington

**Duties and Responsibilities:**

- Personnel administration
- Overall supervision of the environmental staff
- Budget preparation and administration
- Right to Know Law administration for all of Burlington County
- Directly involved in the formation of the Burlington County Environmental Response Unit

**Achievements**

- ❖ Instituted the administration of the Right to Know Law for the County of Burlington and all municipalities in the county to include setting up a countywide education and training program for government professionals
- ❖ Directly involved in establishing the Burlington County Environmental Response Team
- ❖ Directly involved in establishing the Burlington County Hazardous Waste Disposal Program
- ❖ Employed as the first Environmental Administrator in Burlington County

**Education**

**Rutgers University Graduate School of Public Policy**

**Master of Public Policy**

Emphasis on Finance & Budget, Organizational Development, Personnel Administration

**Rutgers University**

**BA in Political Science (High Honors)**

Award for Outstanding Academic Achievement in Political Science, inducted into the Phi Sigma Lambda Honor Society

**Burlington County College**

**AA Social Science**

**Rutgers School of Continuing Education**

**Certified Government Finance Officer**

License #0888-0049

**Professional Affiliations**

Past Vice President - New Jersey Shared Services Coordinators Association  
Chairperson - Burlington County Local Advisory Council on Alcohol and Drug Abuse (LACADA)  
Burlington County Chamber of Commerce (Member of the Economic Development Committee)  
Member & past chairperson of the Riverside Twp. Redevelopment Advisory Committee  
Maple Shade Township Main Street NJ Board of Directors (part of Main Street USA)  
Burlington County Route 130 Advisory Committee (past chairman 1997 -2004)  
Member, Burlington County Anti-gang Task Force  
Member NJ League of Municipalities Legislative Committee (Past Chair Pensions, Personnel and Elections subcommittee)  
Maple Shade Advisory Board of Commerce  
Chairman for the Professional Managers Municipal Joint Insurance Fund (Past Chair of BURLCO JIF)  
Sitting member of the NJMEL  
ICMA

**CRAIG LONON**

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**E-Mail: [clonon@sbcglobal.net](mailto:clonon@sbcglobal.net)**

## **SUMMARY**

More than 30 years of local government experience with expertise in the following areas:

- Operations and Project Management
- Labor Relations
- Customer Service
- Organizational Change and Development
- Economic Development
- Conflict Management
- Strategic Planning & Operations Analysis
- Fiscal Operations and Budget
- Program Design and Implementation
- Media Relations
- Community Redevelopment
- Team Building

An innovative leader with demonstrated organizational, analytical and communications skills. Experienced in managing change and well versed in privatization. Results-oriented with foresight: a dedicated team player who is able to work independently within the organizational framework.

## **LOCAL GOVERNMENT EXPERIENCE**

**City Manager, City of Harlingen, Texas (Retired)**

**2006-2009**

Harlingen is a city of 75,000 located in the Rio Grand Valley in south Texas with 550 employees and an annual operating budget of \$92.9 million. Harlingen is a full service city with police, fire, sanitation, public works, library, health, leisure services, planning and zoning, 4A & 4B sales tax corporations and an airport with daily service from Southwest and Continental Airlines. Major achievements:

- Development and implementation of the city's first CIP,
- Implementation of voter approved single member district plan,
- Negotiated the city's first collective bargaining agreements,
- Implemented a program to annually improve 7% of city streets,
- Development and implementation of the Harlingen 100 strategic plan,
- Consolidation of two Economic Development operations for half the cost,
- Survival and repair of Hurricane Dolly damage,
- Voter approval of 4B sales tax,
- Negotiated with a Fortune 25 Company to create 700+ new jobs,
- Implemented a stalled bond program,
- Constructed a new Police Station, Fire Station and soccer complex,
- Implemented a performance based compensation and classification system,
- Implemented a new retirement system for employees hired after 10/1/07,
- Lowered the tax rate,
- Replaced of several key Department Heads for improved operations.

**City Manager, City of Cedar Park, Texas****2004-2005**

Cedar Park is a fast growing community located on the northwest side of Austin, Texas with 300 employees and a \$55million annual budget. The city has issued nearly 1000 single-family residential building permits each year since 1994. Cedar Park is a full service city, operations include police, fire, library, leisure services, planning and zoning, public works, sanitation, water and wastewater operations, and 4A & 4B sales tax corporations. Major achievements:

- Investigation and a plea bargain of a corrupt Mayor,
- Failure to negotiate a hockey arena management deal,
- Replaced several key employees to improve operations,
- Negotiated a town center site with a developer,
- Recruited a hospital to the city,
- Implemented a city staffed Economic Development operation,
- Implemented a city staffed Visitor's and Convention Bureau,
- Negotiated right of way and use agreements of the Highway 183 toll road,
- Implemented a central city communications operation.

**City Administrator, City of Conroe, Texas****1993-2004**

Conroe is located just north of Houston, has 400 employees and an annual budget of \$50.0 million. Conroe is a full service city; operations include civil service police and fire operations, sanitation, leisure services, planning, public works, water and wastewater operations, and community development. Major accomplishments include:

- Construction of three new major wastewater trunk systems,
- Construction of millions of dollars of water system improvements,
- Implemented of a performance based classification and compensation system,
- Revitalized downtown both aesthetically and with retail business development,
- Replaced a majority of the Department Heads for improved operations,
- Implemented an annual street improvement program,
- Revitalized every city park and built a new major athletic complex and amphitheater,
- Implemented 4B sales tax and Economic Development operations,
- Constructed new fire stations, a police station, service center, and city hall,
- Recruited numerous businesses and industries to Conroe,
- Expanded the city limits numerous times through annexations,
- Implemented a road TIRZ project to fund major road improvements.

**City Manager, City of Corsicana, Tx.****1981-1993**

Corsicana is a full service city of 25,000 located 55 miles south of Dallas. The list of achievements is as long as my tenure there, 11+ years and can be provided upon request.



**City Manager, City of Levelland, Tx**

**1979-1981**

Levelland is a full service city of 14,000 located in west Texas, 30 miles west of Lubbock. A list of achievements can be provided upon request.

**City Administrator, City of DeSoto, Tx**

**1977-1979**

I was assigned to the City Manager for coordination of community based studies, special projects and management plans including the drafting of final reports. I served as liaison to City Council and Department Heads. At the time DeSoto was a fast growing city in the Dallas/Fort Worth Metroplex.

**EDUCATION**

**Master of Public Administration-University of North Texas**

**B.A. Political Science-University of Texas at Arlington**

**PROFESSIONAL ASSOCIATIONS**

- Texas City Management Association – Past President
- International City Management Association
- Region 10 – Texas City Management Association Past President

**CIVIC AFFILIATIONS**

- Harlingen Airport Board – Ex-Officio Member (2006-2009)
- Harlingen Utility Board – Ex-Officio Member (2006-2009)
- Past Member Cedar Park Chamber Board Member
- Past Member Greater Conroe/Lake Conroe Area Chamber Board
- 1999 Conroe Chamber Lobsterfest Chairman
- 1999 Montgomery County United Way Golf Chairman
- Leadership Montgomery County Board 1995-2001

**SPECIAL RECOGNITIONS**

- President Texas City Management Association 2004-05
- Texas City Management Association- Lifetime Achievement Award
- 1991 Chamber Achievement Award - Corsicana
- 1988 Arthur J. Keeney Industrial Development Award

**AREAS OF EXPERTISE**

- FEMA Coordination
- Agency Coordination

**REGISTRATIONS**

ASPA Fellow

ICMA Credentialed Manager

National Incident Management System (NIMS Certification)

**PROFESSIONAL HISTORY**

Government Management Specialist, PEER Consultants, P.C., Burlington, MA 2010 to present

City Manager, Rye, N.Y, 2003 to 2009

Village Manager, Ossining, N.Y., 1997 to 2003

County Administrator, Barnstable, MA, 1995 to 1996

Town Manager, Rocky Hill, CT, 1990 to 1995

Town Manager, Franklin, MA, 1984 to 1990

City Manager, Willimantic, CT, 1979 to 1983

**AFFILIATIONS**

Fellow, American Society for Public Administration

International City/County Management Association

**EDUCATION**

B.A. Business Administration

Masters of Public Administration

Post Graduate Public Administration

**BACKGROUND**

Mr. Shew has over thirty years of experience as a City/ County and Town Manager with City Manager in Massachusetts, New York and Connecticut. Communities managed ranged in size from 15,000 to 280,000 in full time population. They each carried with them different institutional controls and mechanisms. Experience with these communities spanned two Presidential Declaration Floods, work with the US Corps of Engineers; recovery with FEMA; a full field assessment with DHUD; economic development and redevelopment; creation of Project Updates; creation of community outreach and reporting systems; reception and reporting on substantial federal funds without adverse findings; compliance with all DEP, EPA rules and regulations; no adverse findings in procurement or disbursement of federal, state or local funds; and the maintenance of triple A bond rating.

**SELECTED EXPERIENCE**

**Metro Nashville / Davidson County, Long-Term Community Recovery Plan** Government Management Specialist for development of the plan to help guide the long term social, economic and environmental recovery efforts following a disaster and ensure proposed projects are sustainable and will mitigate the impact of similar future events. Conducted an analysis of organization and capacity to determine policies and procedures that could impact the recovery plan. Plan was fast-tracked to accelerate the beginning of the long-term recovery process and to promote the securing of needed funding for the identified projects.

**City Manager, Rye, N.Y.** Created a high performance management team that interfaced with residents and outside agencies with high recovery for damaged infrastructure. Expanded use of enterprise funds to explore optimal operational structures. Established EOC and recovery operations in Presidential Declaration flooding. Coordinated with schools and superintendent with focus on pedestrian and campus safety.

**Village Manager, Ossining, N.Y.** Coordinated the revitalization of the Central Business District including relocation of police/court complex, design of a new fire headquarters, new natatorium and brokering a complex US Post Office as a CBD anchor. Construction of an extended commercial pier for commuter boat traffic to NYC and acquisition of property for future waterfront development. Engaged the Russell Sage Foundation to determine best practices in demographic changes.

**County Administrator, Barnstable, MA** Major focus on environmental work and coordination of efforts with other jurisdictions with emphasis on land use, controlled development and assessment of charges. Instituted changes in personnel time aggregation and reduced accumulated liabilities. Met with all 15 towns in their jurisdictions for assistance. Oversaw closing of the county hospital and relocation of displaced employees.

**Town Manager, Rocky Hill, CT** Attracted two major corporations to the city and negotiated agreements which resulted in significant increases in tax

revenue for the city. Served as Director of Public Safety and Finance Director during the city's search to fill those positions. Managed City for five years without tax increases.

**Town Manager, Franklin, MA** Negotiated the largest public/private agreement in the Commonwealth between the Commonwealth, MBTA, Town of Franklin, National Development Associates and YMCA. Focused on balancing sustainable demands on infrastructure, demands on financing and services caused by new growth. Implemented sustainable growth legislation balancing available infrastructure and demands for residential growth to match growth rate against capacity. Developed Central Business District traffic plan, pedestrian safety, parks and sanitation services

**City Manager, Willimantic, CT** Oversaw the rebuilding of the city's financial systems including required staffing, equipment and knowledge to establish best practices. Consolidation of town and city government to form one governing body, to eliminate 'dual taxation' of city residents. Oversight of DHUD entitlement program through Redevelopment Agency. Worked with collective bargaining units to establish common grounds.

**International City County Management Association- Credentialed Member**

2012 FCCMA Winter Institute- Relevancy of Local Government ...

2011 ICMA University- Baldrige: A Model for Excellence...

2011 ICMA University- Using Surveys to Improve Performance

2010 PM Magazine publication, short article on Volunteers

2005 Day Laborers in Westchester County, A Model... PM Magazine

2003 Post Office location in the CBD as Anchor...PM Magazine

64<sup>th</sup> Annual ASPA Conference, Washington, DC. Presentation Economic Development and the use of Public/Private Partnerships.

**Professional international work**

1989- ICMA International Management Exchange Program- South Staffordshire, England with Graham Haywood and SOLACE

1995. IMEP with Sweden. Hans Granquist, President of Swedish Mngrs

1997- First ICMA exchange with South Africa. Johannesburg. Three more followed.

2000- IMEP exchange with India. (various municipals)

2008- Japan Local Government Center, NYC. CLAIR program graduate with the Miyagi Prefecture

**Other Professional Experience**



## SUSAN A. STANTON, ICMA-CM

P.O. Box 3463 □ Palm Beach, Fl 33480 □ (602) 622-0682 □ susanstanton58@yahoo.com

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### EXECUTIVE SUMMARY

Dynamic, results-driven City Manager with demonstrated executive success providing strong, visionary and innovative management to drive performance in challenging economies. An authentic manager, who offers commitment to valuing people, creativity, integrity, diversity, openness, respect, and teamwork and who attracts talented people and inspires them to succeed.

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### AREAS OF EXPERTISE

- Leadership & Supervision
  - Finance and Budget
  - Vision & Mission Planning
  - Labor Relations
  - Economic Development
  - Project Administration
  - Organization Development
  - Staff Development
  - Contract Administration
  - Crisis Management
  - Staff Development
  - Recruitment & Staffing
  - Strategic Problem Solving
  - Team Building and Leadership
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### RELEVANT LOCAL GOVERNMENT EXPERIENCE

#### Special Assistant to the City Manager, City of Fort Lauderdale, Fl

2012 - Present

Encompassing nearly 36 square miles with a population of 182,521, Fort Lauderdale is the largest of Broward County's 31 municipalities and the state's seventh largest city. With a FY 2012 budget of \$632 million, the City employs 1,850 staff members.

##### Duties and Responsibilities

- Conduct management efficiency studies of city operations, management systems and implement findings to improve productivity and reduce cost.
- Provide management oversight of the City's utilization of \$1.9 million in CDBG funds and \$970,000 in Home Investment Partnerships Funds used to promote affordable housing in the City.
- Assist the City improve the administration of a \$9.3 million program design to provide transitional and emergency housing opportunities for persons with HIV/AIDS.

#### City Manager, City of Lake Worth, Fl

2009-2011

Lake Worth is a diverse city with population of 35,800 and is located on the east coast in Palm Beach County, Florida. Since 2007, the City lost 50% of its total assessed land value and is challenged by substantial foreclosure of residential properties, slum and blight and a history of high turnover of its executive and management staff.

##### Duties and Responsibilities as City Manager:

- Chief executive officer of a municipal government with 318 full time staff with an FY 2012 Budget of \$172 million. Oversight responsibilities for the following functions: electric and water utility system, police, streets, stormwater drainage, sewer, parks, recreation, planning, zoning, building, community development, finance, library services, beach development and solid waste management.
- Administered the City during a State of Financial Urgency and restored fiscal solvency and financial discipline.

##### Achievements:

- Privatized and outsourced costly and ineffectively managed public service functions and reduced FY 2012 personnel expense by \$1.2 million without any reduction in service levels to the public.
- Implemented critical cost saving modifications to City's Pension program which saved \$1.3 million in FY 2012.
- Reduced the annual cost of police protection by \$2.3 million by collaboratively renegotiating a multi-year Law Enforcement Service Agreement without reducing levels of service.
- Reduced the cost of Fire and EMS service by \$11.8 million by renegotiating a ten year Fire and EMS Merger Agreement and removing excessive supplemental fire payments previously agreed to by the City.
- Declared a State of Financial Urgency which allowed the City to dramatically reduce personnel cost and expedite the resolution of a collective bargaining impasse with the City's three labor unions.
- Instituted the use of Financial Forecasting to identify and address projected long range deficits and accurately aligning projected expenditures with available revenues which empowered elected officials to make difficult economic decisions based on accurate financial data and reports.

## RELEVANT LOCAL GOVERNMENT EXPERIENCE

### City Manager, City of Lake Worth, Fl (continued)

- Renegotiated an agreement to secure a \$5 million grant from the Palm Beach County Cultural Facilities Bond for the redesign and redevelopment of the beach and averted the forfeiture of these funds due to inaction and indecision.
- Established a Utility Conservation Program to provide free residential and commercial utility audits and grants to qualified residents to reduce wasteful consumption of electric and water.
- Designed and financed the construction of a \$17 million Reverse Osmosis Water Treatment and \$10 million Deep Well Injection system to improve the City's long term water system
- Developed a long-range Electric Improvement Plan that could be accomplished with in house staff and a city created apprentice program.
- Implemented the "Energized Lake Worth" plan which included GHG Emission Inventory of the City and Communities energy consumption patterns

### City Manager, City of Largo, Fl Assistant City Manager, City of Largo, Fl

1992-2007

1990-1992

The City of Largo is a city with a population of 77,600 residents covering approximately 17 square miles. It is located in the State's most densely populated region in central Pinellas County, Florida. The City is known for being family friendly and dedicated to providing superior services to promote pride and enhance the quality of life to its residents.

#### Duties and Responsibilities as City Manager:

- Chief executive officer of a municipal government with 875 full time staff with a FY 2012 Budget of \$156 million. Oversight responsibilities for the following functions: police, fire, EMS, advanced waste water treatment, solid waste, housing, streets, stormwater drainage, sewer, reclaimed water, parks, recreation, planning, zoning, building, community development, finance, library services, cultural arts and golf.
- Develop, implement, and evaluate redevelopment strategies to attract businesses by successfully adopting Community Redevelopment Districts which addressed conditions of slum and blight and supported private investment through plans, policies and programs that afforded maximum rehabilitation and redevelopment.
- Foster positive employer-employee relationships which promoted high employee morale.

#### Achievements:

- Demonstrated open and transparent communications with the Mayor, City Commission, employees, and community and exemplified the best principles and practices of the council-manager form of government.
- Prepared and shared information equally with all members of the City Commission; provided the Commission with alternatives, fiscal impact analysis and recommendations on all matters affecting the community.
- Planned, organized, and managed redevelopment projects to provide incentives and remove barriers for community redevelopment and reinvestment.
- Responsible for negotiating a private/public partnership that created a downtown mixed-use development which entailed retail and professional office construction with townhomes and apartments
- Expanded the City's economic and property tax value by \$330 million dollars by the establishment of a multi-year Annexation Management Program which started in 1997.
- Supervised the financing and construction of a \$22 million dollar library and the renovation of an \$11 million dollar city complex. Coordinated the purchase, acquisition, and financing of commercial and residential property for the construction of a regional park to stimulate reinvestment in the downtown.
- Instituted a comprehensive evaluation system of all employee positions, classifications and job structure and design to ensure personnel system was fair to employees and meeting current and future needs of the organization. The process included job restructuring, manpower forecasting and organization realignment.
- Created an innovative *program to increase productivity, reduce absenteeism and control preventable healthcare costs. The program consisted of voluntary seminars throughout the year, an annual employee health screening event, employee assistance programs and the creation of participant wellness plans with specific goals to address health related risks and to promote healthy behavior and lifestyle choices.*
- Established an innovative succession planning program designed to ensure stability and continuity in leadership and management functions in all work programs, divisions and departments. Program included the creations of leadership workshops for executives, supervisors and employees to prepare managers for future promotion and responsibility.

## OTHER PROFESSIONAL EXPERIENCE

### **City Administrator, City of Berea, KY**

1986-1990

The City of Berea, located in the Kentucky Bluegrass, is a college community with a population of 12,000 residents and an FY 1990 budget of \$7.2 million. In FY 1990, the City employed 85 employees in the departments of Administration, Finance, Police, Fire, Planning, Public Works, Solid Waste, Land Fill Management, Recreation, and Industrial Development. Developed a comprehensive economic development program in the creation of a large Industrial Park which resulted in four international manufacturing firms locating in the City.

### **Administrative Assistant to the City Manager, City of Champaign, IL**

1984-1986

The City of Champaign, home of the University of Illinois with a population of 60,000 residents and an FY 1986 budget of \$26 million. In FY 1986, the City employed 380 employees. Major accomplishments included coordinating a \$4 million renovation project of City Hall and conducted and prepared policy analyses and recommendations for City Council consideration on issues relating to the operations, responsibilities and functions of city departments.

### **Administrative Assistant to the Borough Manager, Ketchikan, AK**

1983-1984

The Ketchikan Gateway Borough consists of several islands in Southeast Alaska's Inside Passage and the Tongass Narrows with a population of 14,000 residents and an FY 1984 budget of \$4.3 million. Accomplishments included acting as the Boroughs' primary representative for negotiating labor contracts with International Organization of Masters, Mates and Pilots (MMP) and the Inland Boatmen's Union (IBU) which reduced operating costs and strengthened management rights and conducted performance analysis of Borough operations and made recommendations for the reorganization of staff and management control systems.

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## EDUCATION

University of Florida, Graduate School, Public Administration  
 University of Florida, College of Political Science  
 Harvard University, John F. Kennedy School of Government  
 Senior Executive in State and Local Government  
 University of Oklahoma, Economic Development Institute  
 University of Virginia, Weldon Cooper Center for Public Service  
 Leading, Educating and Developing

Masters in Public Administration  
 Bachelor of Arts  
 Continuing Education  
 Certificate of Completion  
 Continuing Education

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## EMERGENCY MANAGEMENT TRAINING

- US. Dept of Homeland Security, WMD Radiological/Nuclear Course, Bechtel Nevada; 2005.
- US Dept of Homeland Security, WMD Training and Incident Command (COBRA), 2004
- New Mexico Institute of Mining and Technology, Incident Response to Terrorist Bombing, Energetic Materials Research and Testing Center, 2003.
- Emergency Management Institute, Disaster Preparation, Hurricane Recovery and Mitigation, 1992, 1994
- Emergency Management Institute Integrated Emergency Management for Hurricanes, Consequences of Terrorism, National Emergency Training Center, 1998, and 2000,

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## PERSONAL

Completed the New York City, Chicago, and Marine Corp. Marathons. Certified as an Advanced SCUBA Diver and a licensed Lay Eucharistic Minister with the Episcopal Diocese of Southeast Florida

**References Provided Upon Request**

# BOB VITAS

820 Ravenswood Court, Lake Zurich, Illinois 60047

Home: 847-847-7946 Mobile: 224-202-4107 E-Mail: bobvitas@gmail.com

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## RESUME

A high impact local government chief administrative officer with diverse experience in overseeing complex multidisciplinary organizations coupled with extensive private sector management consulting experience focused on USAID democracy and governance projects overseas in post conflict transition countries and in the U.S. on FEMA disaster relief programs. Innovative, results orientated leader that strongly encourages team work, individual performance and a collaborative approach to achieve organizational excellence and promote community prosperity. Highly skilled in strategic planning and community visioning, successfully managed both rapid growth and economic recovering communities producing significant results. Innate ability to communicate successfully with donors, elected and appointed officials, staff, general public, businesses, and the media to achieve important organizational goals. Provided professional management or consulting services for more than 100 government entities, ranging in size from communities of 5,000 to capitol cities of over 1.57M. Areas of expertise and specialized knowledge:

- Turn Around and Change Management
- Strategic Management Planning
- Organizational Analysis and Project Management
- Monitoring and Evaluation
- Labor Relations and Personnel Management
- Economic and Community Development
- Financial Management and Budgeting
- Public Procurement & Debt Management
- Constituent and Customer Relations
- Intergovernmental Relations

## LOCAL GOVERNMENT MANAGEMENT EXPERIENCE

- Village Administrator*** 2007 – 2011  
Village of Lake Zurich, Illinois population 19,964, \$45M budget and 172 full time employees
- City Administrator*** 2000 – 2001  
City of Lewiston, Maine, population 35,690, \$67.7M budget and 550 employees
- Town Administrator*** 1991 – 2000  
Town of Menasha, Wisconsin, population 16,546, \$22M budget and 198 employees
- Administrator Finance/Personnel*** 1987– 1989  
City of McHenry, Illinois, population 13,656, \$11.9M budget and 183 employees
- Director of Development Services*** 1985 – 1987  
City of East Moline, Illinois, population 20,960, \$12.5M budget and 152 employees
- Assistant to City Manager*** 1982 – 1985  
City of Crystal Lake, Illinois, population 42,142
- Administrative Intern*** 1980 – 1982  
Village of Willowbrook, Illinois, population 8,967

## GOVERNMENT MANAGEMENT CONSULTING EXPERIENCE

- Associate, short term, USAID Democracy and Governance proposal, Republic of Uganda*** 2012  
Management Systems International, Washington, D.C

## BOB VITAS

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- Associate, short term, USAID Monitoring & Evaluation contract, Republic of Serbia* 2007  
The Mitchell Group, Inc., Washington, D.C.
- Vice President, Community Municipal Economic Development Programs* 2006 – 2007  
America's Development Foundation, a 501c (3) corporation, Alexandria, Virginia
- Operations Manager and Deputy Team Leader– City of New Orleans* 2005 – 2006  
*Regional Program Manager – South Central and South Western Louisiana*  
*U. S. Department of Homeland Security - FEMA Long Term Community Recovery Program*  
AECOM International Development, Washington, D.C.
- Project Manager – City of Belgrade Metropolitan Project* 2001- 2005  
*Chief Municipal Advisor - Financial Management and Citizen Participation*  
*Senior Municipal Management & Financial Management Advisor*  
*USAID Serbia Local Government Reform Program, Republic of Serbia (former Yugoslavia)*  
AECOM International Development (formerly PADCO), Washington, D.C.
- Deputy Director, Division of Urban Management, Finance, and Governance* 2000  
*Senior Financial Advisor, short term, USAID contract Republic of Zambia*  
Planning & Development Collaborative International (PADCO), Washington, DC
- Government Finance Advisor, short term contract, Federation of Bosnia-Herzegovina* 1998  
International City and County Management Association, Washington, DC
- Government Management Advisor, short term contract, Federation of Bosnia-Herzegovina* 1996  
International City and County Management Association, Washington, DC
- Special Agent and Registered Representative* 1990 – 1991  
The Prudential Insurance Company of America, Illinois

### EDUCATION

- Master of Arts in Public Affairs (MPA)*, concentration Urban Management and Development  
Northern Illinois University, De Kalb, Illinois, 1982
- Bachelors of Arts, Political Science*, double major - International Relations and Public Law, Russian Minor  
Northern Illinois University, De Kalb, Illinois, 1979

### NATIONAL INCIDENT MANAGEMENT SYSTEM CERTIFICATIONS

- United States Department of Homeland Security FEMA Emergency Management Institute  
ICS 100 Introduction to the Incident Command System November 2008  
ICS 200 ICS for Single Resources and Initial Action Incidents January 2009
- United States Department of Homeland Security FEMA Center for Domestic Preparedness  
ICS 300 Intermediate ICS for Expanding Incidents January 2009
- Texas A&M University System - United States Department of Homeland Security Office of Grants and Training  
Senior Officials Workshop for All-Hazards Preparedness February 2009  
Public Information in a Weapons of Mass Destruction/Terrorism Incident January 2010  
Mayoral Institute Seminar for All-Hazards Preparedness March 2010



## **BOB VITAS**

**820 Ravenswood Court, Lake Zurich, Illinois 60047**

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### **PROFESSIONAL AFFILIATIONS**

- International Council of Shopping Centers 2008 - present
- Illinois City Management Association 1985-1991, 2007 - present
- International City/County Management Association 1980-2004, 2011 - present
  - International Task Force 1999 - 2000
  - Committee on International Management Issues 1997 - 1999
- Chicago Sister Cities International - Belgrade Committee Member 2006 - present

### **RECENT ACCOMPLISHMENTS**

- Under my direction Lake Zurich achieved its first prestigious Government Finance Officers Association of the US and Canada Distinguished Budget Presentation Award for Fiscal Year 12 on first attempt
- Restructured and reorganized the organization in FYs 9, 10 and 11 resulting in a reduction of 26 full time positions and a permanent cost savings in excess of \$2.5 million in salary and fringe benefits while not impacting level or quality of municipal services
- Successfully initiated and orchestrated a public referendum in November 2010 to authorize the Village of Lake Zurich to impose a local non home rule sales tax of .5% projected to raise \$2.0M in FY 2012 for public infrastructure improvements and general property tax relief in future years
- Crafted and instituted a 2.5% Municipal Utility Tax raising \$750K in new revenue for FY 2011 to assist with general fund expenditures to maintain service levels
- In concert with Finance Director and consultants devised a financial plan to restructure and refund all existing TIF obligation debt resolving a long-standing internal financial crisis affecting all municipal funds
- Maintained the Village's Moody A-1 Bond Rating for all prior Village debt obligations and obtained a Standard and Poor AA positive bond rating upgrade for the restructuring and refunding of \$16 million in TIF obligation debt resulting in a \$1 million cost savings to the taxpayers
- Instituted Capital Improvement Plan and Budget to address public infrastructure, capital equipment, and public facility needs as funded by the new local non home rule sales tax and other revenue sources
- Managed to fully fund the public safety pension fund annual actuarial requirements for both police and fire the past three fiscal years, reversing a 17 history of negligent underfunding thereby increasing the combined general fund tax levy contributions from \$400K to \$2.5M while correspondingly reducing other expenditures
- Prepared and conducted a Request for Qualifications for legal services resulting in a significant reduction in annual legal saving taxpayers nearly \$200K annually replacing corporation counsel after 22 years of service
- Renegotiated contractual relationship between Lake Zurich and Rural Fire Protection District resulting in \$600K in increased revenue to the Village from four adjoining municipalities the past three fiscal years
- Completed an Intergovernmental Agreement with the Village of North Barrington and Lake County on behalf of the Wynstone Property Owners Association for extension of sanitary sewer services outside of Village and generating \$840K in connection fees and significant new annual water and sewer revenues for Lake Zurich
- Negotiated memorandum of agreement with Canadian National (CN) rail road obtaining \$2M for mitigation costs to alleviate impacts of increasing rail operations pursuant to final environmental impact statement issued from United States Surface Transportation Board in Washington, DC
- Attracted and retained two new commercial businesses in the downtown TIF district, orchestrated the development of a new park, oversaw the remediation of two downtown Brownfield sites, the demolition of three buildings to create pad ready sites, and settled a six year old lawsuit involving a tenant allowing for future remediation of the site, and demolition the several remaining buildings to create pad ready sites
- Successfully resolved long standing 18 year dispute with Village of Kildeer resulting in a new understanding allowing for the development of new commercial properties on Illinois Route 12 and Illinois Route 22

## **BOB VITAS**

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- Oversaw and managed the process for execution of a new master redevelopment agreement for the downtown TIF district which will potentially lead to private investment of up to \$260M
  - Initiated and directed process by which a one of a kind Form Base Code, Development Regulations and Overlay District were adopted for the redevelopment of the downtown TIF district
  - Coordinated and negotiated the successful conclusion of a \$9M lawsuit involving the Village of Lake Zurich TIF district, the developer and lending institution which commenced in 1997, resulting in the return of all affected Village property, payment of \$750K non-disputed funds by the Village, termination of the development agreement, and limiting total loss to under \$250K to assist in satisfying mechanic liens
  - Creatively developed financial solutions for both the foreclosed Coventry Creek and Flint Crossing residential developments with two lending institutions to remove properties from foreclosure and return to active development status at no Village cost
  - Initiated and developed a tailored comprehensive strategic management planning system to provide for more transparent, accountable and efficient government; including community outreach measures, internal self assessments, and performance measurement tools resulting in the establishment of clear and attainable strategic goals and objectives linked to realistic financial resources, budgetary plans and delivery of services
  - Coordinated Lake Zurich's first Citizen Satisfaction Survey through the Northern Illinois University Public Opinion Laboratory and integrated results as a component of the Overall Strategic Management Planning process which I developed for the Village
  - Researched and acquired updated hardware and software equipment necessary for the live transmission of all official Village meetings and related agenda materials via the Internet and television broadcasting to improve public access and to promote more open and transparent government operations on Granicus platform
  - Re-examined existing labor agreements based on the downturn of the economy and renegotiated the terms of the final contract year resulting in a \$700K cost saving to the taxpayers for FY 2011. All employees accepted a salary freeze and ten percent increase in individual health insurance premium costs
  - Implemented a new merit based pay for performance evaluation system for all Village employees
  - Prepared a new Employee Handbook in accordance with all current applicable Federal and State employment laws, replacing an outdated 1988 Personnel Policy Manual in FY 2011
  - Evaluated Village's partially self-funded health insurance program and migrated to a fully funded plan, resulting in a recurring \$1M reduction in annual premium costs to the Village
  - Created Assistant Village Administrator position to bolster administrative oversight of the organization
  - Created Human Resources Manager to lead a new Human Resources Division within the Administration
  - Directed consultants in development of a Job Classification and Compensation Plan and Management Audit for implementation in FY 2010 to establish internal and external equity for non-union employees after salary plan was abandoned 17 years earlier
  - Instituted internship programs with Northern Illinois University and University of Illinois at Chicago in the Administration, Finance and Building and Zoning/Economic Development Departments to mentor young professionals and benefit the organization
  - NIU MPA Intern Supervisor of the Year Award 2011
  - Outsourced electronic payroll function to replace paper based system to enhance efficiency and accountability

*Further supplemental information available upon request*

3436 Gardenview Way  
Tallahassee, Florida 32309  
850.559.1348

## Thaddeus L. Cohen, AIA

[thaddeus.cohen@earthlink.net](mailto:thaddeus.cohen@earthlink.net)

Senior executive with an accomplished record in the public and private sectors. Developed innovative policy and program solutions to complex, multidisciplinary statewide and local challenges. Expertise in architecture and urban design with the ability to interpret a client's vision and construct a team of professionals who are capable of realizing the concept.

Demonstrated organizational focus on strategic planning with the ability to implement conceptual plans. Management approach considers the needs of stakeholders while confronting complex issues and fashioning highly effective teams.

### OUTSTANDING ACCOMPLISHMENTS

- Author of the City of Pensacola's *Deepwater Horizon Oil Spill Long Term Recovery Plan*. The Plan established strategies that align with the Economic Recovery portion of the Secretary of the Navy Ray Mabus' *America's Gulf Coast Report*. The Secretary's announcement of the *America Gulf Coast Report* in Pensacola and Environmental Protection Agency Administrator Lisa Jackson's decision to host the first Gulf Coast Ecosystem Restoration Task Force meeting in Pensacola were direct results of the Plan.
- Principal team negotiator in the development of the \$52M Community Maritime Park, a 40-acre development that includes a minor league baseball stadium, 7000-seat amphitheater venue, and 500,000 square feet of private mixed-use development. Financing for the project included a City land donation, Build America Bonds, Tax Increment Funds, and New Market Tax Credits.
- Redefined the strategic direction for the Port of Pensacola, and attracted the first major tenant to the Port in five years, Offshore Inland Oil and Marine Services Inc. Incentives included a relocation package provided by the Community Redevelopment Agency with wharfage and dockage relief contributed by the Port. Overall effort produced 50 jobs and \$6.2M in economic activity in the first six months of operation.
- Established an "Enlivening Public Spaces and Branding Strategy" that created a specialty center branded as the "Entertainment District," credited with the resurgence of the downtown retail core. The Entertainment District increased food and beverage establishments by five percent with a twelve percent increase in the labor force over two-and-a-half years.

### LEADERSHIP SKILLS

General Administration • Legislative Affairs • Policy Formulation and Implementation • Organizational Transformation • Strategic Planning • Citizen Involvement Initiatives • Capital Budget Development • Economic Community Development Strategies • Program and Construction Management • Contract Monitoring • Negotiation Strategies • Government Relations

### PROFESSIONAL EXPERIENCE

#### City of Pensacola, Florida

*Assistant City Manager and Community Redevelopment Agency Director, 2008 – 2011*

*A full-service, municipal government with a \$217M annual budget and 860 employees supporting a community of 52,000 residents.*

Provided strategic direction for the Parks and Recreation Department, Housing Department, Saenger Theater, and Port of Pensacola. Provided day to day management for the Planning, Building Inspections, Neighborhood Enhancement Team, and the Community Redevelopment Agency.

- Management team participant in developing the City's 30-month budget. Developed Citywide departmental priorities that maintained critical City services while reducing staff positions by 12 percent between 2008 and 2011.
- Led citywide citizen engagement effort during the State-mandated update of the City's Comprehensive Plan. The plan was recognized by the Florida Department of Community Affairs for its innovative strategies in transportation and land use.
- Principal author of the Community Redevelopment Agency's *Community Redevelopment Plan 2010* to create a vision for downtown. The *Plan* achieved the first update since 1985, establishing the downtown strategic framework for the next fifteen years.
- Implemented the traffic management "retail strategy" that increased downtown vehicular traffic by 80 percent and pedestrian traffic by 25 percent in the City's retail core.
- Led the Community Redevelopment Agency and City's participation in the development of a downtown technology park. Created the conceptual plan establishing the design guidelines and infrastructure parameters and coordinated activities associated with the construction of the site development.
- Optimized operations at the City of Pensacola Municipal Golf Course by restructuring and reinvestment efforts resulting in a 35 percent reduction in operational cost as part of an investment strategy to redesign and modernizes greens and fairways and renovate and rebrand the clubhouse concessionaire operations.
- Established the City's New Year's event, the *Pelican Drop*™, gaining regional and national media coverage. The event was attended by over 50,000 participants, and is acknowledged as the premier event in Northwest Florida and the Gulf Coast, leading to 100 percent occupancy in downtown hotels and increased retail sales.

**Florida Department of Community Affairs, Tallahassee, Florida**  
*Secretary, 2004 – 2007*

*The State of Florida's land planning, emergency management, housing and community development agency.*

Responsible for the Department's policies and operations organized into three service areas: The Division of Community Planning develops and administers Florida's growth management programs; The Division of Housing and Community Development administers State and Federal programs designed to provide community and economic development assistance; and The Division of Emergency Management leads the State's emergency response team and provides response, planning, and mitigation for manmade and natural disaster.

- The Division of Emergency Management delivered \$3B in State match for FEMA hurricane disaster dollars in 2004-2005.
- Developed policies and administered \$1.2B in HUD disaster supplemental dollars to hurricane-affected communities in 2004-2005. In coordination with FEMA, the Division of Community Planning prepared the most comprehensive citizen-based, long-term recovery plans to address the catastrophic damages caused by these storms.
- Passed SB 360 (2005) "pay as you grow" legislation to ensure that roads, schools, sewer, and water were available to meet the needs of the communities in one of the fastest growing states in the nation.
- Created the Coastal High Hazard Study Commission through an Executive Order from the Governor. The Commission, a blue ribbon committee, evaluated the State's regulatory framework related to coastal

development polices in the Department of Environmental Protection, the Office of Insurance, the Building Code Commission, the Division of Emergency Management, and other stakeholders.

- Successfully developed and passed legislation with the Florida Building Commission to bring Florida panhandle counties under a unified Building Code, resulting in lower home owner insurance costs under the insurance industry's community rating system.
- Funded university research on establishing higher residential construction standards to promote sheltering in place in order to reduce evacuation requirements.
- Led the State's first ever development and implementation of fiscal impact analysis modeling and visual planning tools to assist regions in forecasting their visions and budgets.
- Launched the State's coordinated effort of SB 444 (2005), tethering the State's Water Management District's regional water plans to Regional Planning Council's Strategic Regional Policy Plans and ensuring a stronger connection between land development and the use of the State's water resources.
- Spearheaded and funded regional planning efforts like the Sustainable Emerald Coast, Sustainable Treasure Coast, Issues 2005 Southwest Florida, and Orlando's "How Shall We Grow?" visioning efforts. Such indicatives positioned these communities to successfully obtain \$11M in Federal funding from the Sustainable Communities program in 2010.

**Thaddeus Cohen Architect, PA**, Delray Beach, Florida  
*President, 1984 – 2004*

*An award-winning architectural and planning firm focused on urban design, community planning, transportation, education, health care, criminal justice, and recreational facilities.*

Principal of a 10-person organization, providing leadership and vision for the firm's projects. Served as the lead for business development, project delivery oversight, proposal preparation, and staff development.

- Responsible for highly-visible K-6 educational projects in Miami-Dade, Broward, and Palm Beach County School Districts.
- Developed the architectural design criteria and guidelines for the double tracking and station expansion of the South Florida Tri-County Commuter Rail system.
- Developed the award-winning Anne Kolb Nature Center as a part of the last remaining 1,500 acre environmentally-sensitive land in Broward County, Florida along the inter-coastal waterway.
- Authored redevelopment studies for Florida communities as varied as Bahama Village, Key West, Sistrunk Neighborhood Fort Lauderdale, and Northwest Neighborhood West Palm Beach.
- Designed the award-winning Harry and Harriette T. Moore Museum in Mims, Florida dedicated to Harry T. Moore, the NAACP organizer killed on the Christmas Day 1951 bombing of their home.
- Provided construction administration services for several criminal justice facilities including the North Broward County Courthouse, 750-bed Male Correctional Facility in Moore Haven, Florida, and the 1350-bed Male Correctional Facility in South Bay, Florida.

## STATE ACTIVITIES

**Florida Communities Trust** – *Chair, 2004-2006*

**Legislative Committee on Intergovernmental Relations** – *Member, 2004-2006*

**Sustainable Emerald Coast** – *Member, 2006*

**Sustainable Treasure Coast** – *Co Chair*, 2004  
**Florida Housing Finance Corporation** – *Board Member*, 2004-2006  
**Coastal High Hazard Study Commission** – *Co-Chair*, 2005  
**Acquisition and Restoration Council** – *Member*, 2004-2006  
**Hurricane Housing Work Group** – *Member*, 2004-2005

## PROFESSIONAL ACTIVITIES

**Urban Land Institute** – *Florida Committee for Regional Cooperation*, 2003-2004  
**American Institute of Architects Florida** – *Board of Directors*, 2003  
**Fiscal Impact Analysis Model Study Group** – *Governor's Appointee*, 2002-2003  
**Growth Management Study Commission** – *Governor's Appointee*, 2000-2001  
**1000 Friends of Florida** – *Board of Directors*, 1999-2004  
**Saint Andrews School**, Boca Raton, Florida – *Board of Directors*, 1999-2003  
**American Institute of Architects Florida**, Palm Beach Chapter – *President*, 1997-1999  
**Chamber of Commerce**, Delray Beach, Florida  
**Delray Beach Housing Authority** – *Vice Chairman*, 1995-1998  
**Commission on Affordable Housing**, Palm Beach County – *Chairman*, 1990-1996  
**Council for Black Economic Development**, Broward County – *Chairman*, 1987-1995  
**Broward Economic Development Council/Broward Alliance** – *Board of Directors*, 1986-1995  
**Partners in Excellence**, Broward County – *Board of Directors*, 1984-1986

## AWARDS

**Palm Beach Chapter AIA**: Design of Loxahatchee Preserve Nature Center, West Palm Beach, Florida – *1999 Design Award of Honor*  
**Palm Beach Chapter AIA**: Design of Anne Kolb Nature Center, Hollywood, Florida – *1998 Design of Merit*  
**Florida Department of State**, Division of Cultural Affairs – *1997 Florida Design Arts Award of Merit*  
Design of Loxahatchee Preserve Nature Center, West Palm Beach, Florida  
**Palm Beach Chapter AIA**: Design of Sabal Palm Youth Center, West Palm Beach, Florida – *1997 Design Award of Merit*  
**Achievement Citation Award**, Social Policy – *Northwest Neighborhood Comprehensive Redevelopment Plan*, Miami/Fort Lauderdale, Florida  
**Minority Development Business Council** – *1989 Minority Business Advocate of the Year*

## REGISTRATION

Registered Architect Florida

## ACADEMIC CREDENTIALS

Bachelor of Architecture, Kent State University, Kent, Ohio

# KENNETH BROOKS DAVIS

P.O. Box 1518, Islamorada, FL 33036 / Phone: 305.796.7494 / Email: kbd3548@aol.com

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## CAREER TARGET: CITY MANAGER, KEY WEST, FLORIDA

**Over 20 years of experience that includes leadership positions with the United States Army, Drug Enforcement Administration, and United States Coast Guard. Former Resident Agent-in-Charge for the DEA's Florida Keys operation. Top Secret Clearance. Multiple awards and recognitions for performance. Long time resident of the Florida Keys and native Floridian.**

Summary: Highly skilled in building strong, sustainable relationships at all levels of government. In-depth awareness and experience with cultural diversity from positions in U.S. and international operations. Background as a spokesperson and advocate for an organization's programs and objectives. Advanced abilities and proven success in resolving conflicts among parties with differing agendas. Experience in supervising large teams, controlling multimillion-dollar assets, and managing financial, HR, and administrative functions. Strong background in managing and conducting financial audits.

### Knowledge/Skill Areas:

- Promoting Tourist City Image and Attractions
- Managing Relationships with High-Ranking Officials
- Building Relationships with Community Members
- Connecting with People from Diverse Backgrounds
- Establishing and implementing a Vision for Success
- Demonstrating Fiscal / Operational Responsibility

*"I am a passionate advocate for tourist cities such as Key West. They are an integral part of America and deserve the very best leaders to showcase their vitality, vibrancy, and value. I am the type of manager and advocate who can bring this level of leadership and dedication to the City of Key West."*

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## PROFESSIONAL EXPERIENCE

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DEPARTMENT OF DEFENSE / UNITED STATES ARMY – Baghdad, Iraq  
**Director, National Information and Investigation Advisory/Transition, 2010-2011**

Provided leadership and direction for all areas of the NIIA (the equivalent of the FBI in Iraq), serving as the senior advisor to the Deputy Minister of the Interior, Director of the NIIA. Recruited, hired, mentored, and led team of 30 comprised of professionals from the FBI, Secret Service, DEA, DHS, NCIS, OSI, and other agencies. Oversaw infrastructure, housing, logistics, maintenance, and security activities affecting 12,000 personnel.

Consulted with NIIA senior leadership to advise on planning, management, and leadership decisions. Worked jointly with Deputy Minister on training initiatives and policy/procedure development.

- **Built excellent alliance with the Deputy Minister of the Interior** essential to the success of the NIIA Advisory mission, with the NIIA outperforming other intelligence agencies in practicing rule of law, evidence-based prosecutions, and technical expertise for gathering/disseminating criminal intelligence.
- **Maintained higher level of staff continuity than any other Director** through extensive efforts in staff recruiting, performance evaluation, and long-term planning to meet mission-critical goals.
- **Developed positive relationships with leaders in the Iraqi government**, persuading them to set aside cultural, political, and religious differences to allow NIIA to succeed for the benefit of all parties.
- **Facilitated highly positive results incorporated into Congressional reports** for direct response to Congress, with an emphasis on collaborations between numerous entities (military and civilian).
- **Planned and executed programs within high-risk areas**, engaging with Iraqi counterparts 3-5x per week and maintaining record of zero injuries and accidents despite multiple dangers.

DYNCORP INTERNATIONAL / U.S. GOVERNMENT – Baghdad, Iraq  
**Senior Advisor, Technical & Electronic Surveillance, Law Enforcement, 2009-2010**

Led and coordinated execution of technical and electronic surveillance programs critical to counter-intelligence investigations under the Iraqi Rule of Law, functioning as an advisor to the Major General, Director of Technical Affairs. Identified need for legislation of surveillance laws to enhance Iraqi law enforcement and protect citizens' rights. Managed purchase of technical and electronic surveillance. Conducted extensive number of financial audits as Inspector.

- **Assisted in security and safety planning/execution for major "Rule of Law" event** for Iraq, with plan subsequently used by Iraq agencies to prepare security and gather intelligence for future key events.
- **Requested for return to Federal Service** and subsequent Director position in 2010 based on leadership, management, and success in this position.

DRUG ENFORCEMENT ADMINISTRATION – Multiple Locations  
**Agent in Charge / Inspector / Special Agent, 1986-2008**

Built distinguished record of achievement and advancement through increasingly responsible positions with the DEA. Completed numerous assignments across multiple locations, including the Florida Keys, Washington, D.C., and California. Earned multiple Exceptional Performance Awards and Exceptional Service Awards.

- **Served as Resident Agent-in-Charge, Florida Keys.** Planned, coordinated, and led federal/global conspiracy and financial investigations for the DEA's Key Largo and Key West offices.
  - **Formed operational task force comprised of local, state, and federal agencies, leading to \$100,000+ in assets seized for Key West.**
  - **Recruited and managed confidential sources who played key role in meeting goals and objectives critical to the success of the office.**
- **Served as Inspector, Office of Inspector General in Washington, D.C.** Conducted comprehensive inspections to ensure compliance with laws. Traveled at a moment's notice to investigate and report on critical incidents. Provided recommendations for managing offices in various countries worldwide.

*\*\* Prior experience as Special Agent with the U.S. Coast Guard Intelligence, 1980-1986 \*\**

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## EDUCATION & CREDENTIALS

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**Master in Public Administration Program (inc); Bachelor of Science in Criminal Justice**  
 NATIONAL UNIVERSITY – San Diego, CA

**Training:** U.S. Advisor Training & Combat Life Saving Course; Financial Audit Training; DEA Basic Agent Training; Group Supervisor Institute, DEA; Management Development OPM Executive Seminar Center; Clandestine Lab Invest/Safety, DEA; Asian Organized Crime Conference; Financial Investigations & Asset Forfeiture, DEA; Contemporary Problems in U/C, DEA; Advanced Agent Training, DEA; Criminal Investigations Training, FLETC; Maritime Law Enforcement Academy, USCG; Small Boat Navigation & Handling, USCG; Certified Scuba Diver

**Awards:** Joint Service Civilian Commendation Medal, U.S. Army, 2011; Civilian Global War on Terrorism Medal, U.S. Army, 2011; Special Service Award, DEA Administrator, 2005; Exceptional Service Awards (2), DEA Administrator, 2003, 1997; Exceptional Performance Awards (4), DEA Administrator, 2000, 1998, 1995, 1991; Outstanding Contributions, AFFNA, 1998; Sustained Superior Performance, DEA, 1994; Sustained Superior Perf Award, DEA, 1990; Good Conduct Medal, Meritorious Service Medal & Humanitarian Service Medal, USCG

**Affiliations:** Member, Key West Rotary; Founder, Thursday Night Men's Club (Baghdad). **Publications:** Author of numerous pieces on Baghdad for Florida Keys publications. **Designation:** Top Secret Clearance with Special Compartmentalized Access, Leading and Managing in Critical Incidents



## **Margaret A. Romero**

1615 Washington St. Key West, Florida  
305-296-3284 / 561-523-4433

### **Professional Profile**

Seasoned professional with successful consulting, project management, organizational change, and marketing experience. Significant achievements in innovative new business development, strategic planning, alliance partnerships, relationship management and event management. Proven expertise with data gathering, analysis, and interpretation, corporate facilitation, process improvement, program management, and proposal and contract development. Reputation as an innovative and energetic self-starter with excellent leadership, organizational, communications, and teaming skills.

### **Professional Experience**

#### **Executive Consultant**

- Led or influenced consulting engagements focused on improving Client and Supplier relationships and process improvements. Activities included Client/Supplier data gathering, compilation and analysis, creation of unique workshop content based on framework for "as-is" and "to-be" models by identifying and prioritizing improvement areas, facilitation of sessions to identify root causes, develop problem statements, discover alternative solutions, articulate action plans, monitor progress of action plan implementation to drive recommended changes, development and delivery of executive presentations
- Provided appropriate training and tools for clients' personnel to better conduct effective team meetings and become self-sufficient in areas of continued improvement
- Developed subject matter expertise in the areas of governance, organizational relationship management, organizational trust, and leadership competence
- Performed as Trusted Advisor to Executive Level Management, operations personnel, and staff
- Served on numerous task forces focused on increased customer sat experience in multiple industry environments
- Created best practices guidance on effective governance and organizational relationship management – both inter and intra company.

#### **Global Business Partner Manager**

- Managed overall coordination and execution of Division participation for Worldwide Business Partner Executive Conferences. Duties included coordination of internal clients (exec and staff), external vendors and partners regarding logistics, marketing collateral, development of executive speeches, coordination of elective sessions and trade show area, Sponsor and Partner attendee processing and tracking, executive participation, and expense reconciliation. All projects on time and under budget with high sat ratings.
- Served as spokesperson for Division on Partner Initiatives with specific focus on incentives, communications, productivity and satisfaction levels
- Developed Partner Strategies for multiple Division projects designed to improve participation rates and satisfaction (30 % and 50% respectively).

#### **Latin America Channels Manager**

- Assisted Worldwide executive team in development of first Worldwide Channels White Paper; co-wrote Worldwide Harmony Strategy for Brands, Industries and Channels. This included the design of required management systems, tools, processes and measurements.
- Built channels organization in Latin America from the ground up to 30% + overall contribution
- Created and delivered unique channel education classes for Latin American executives, management and staff focused on growing Channel business in LA countries.
- Participated in crafting strategies and resolving client concerns involving utilization of International Business Partners in Latin America

## Program Manager for Small & Medium Business and Business Partners

- Created and implemented company's 1<sup>st</sup> electronics channels for PCs, 1st Aftermarket Alliance, and 1<sup>st</sup> Services Business Partner, as well as innovative programs for Partners
  - Responsible for all aspects of program implementation from design to national roll-out. Included executive sponsorship of concept, initial business cases, staffing, documentation of required processes, guidelines for multi divisional approvals, advertising, budget, training development for management and staff, tracking and evaluation processes.
- Researched and created training materials for "Marketing to Entrepreneurs" and "Fast Growing SMB Businesses", coordinated T3s ( Teach the Teachers) and roll-out of national programs
- Interfaced to and advised Area Executive Management to grow both SMB and Partner business. Results over the 2 year period was growth in those areas by 40%

## Other Key Assignments

Baldrige Quality Award Examiner  
Developed and led Transformational Leadership Programs  
Multiple Marketing Programs and Sales positions  
Math Teacher at the Junior and Senior High School levels

## Education

Barry University, Bachelor of Science, Mathematics  
IBM Certified Consultant - Business Strategy, Organizational Change Management

## Other

Participant in Family Owned Major Appliance Franchise Dealership

## Employment History

1973 – 1974 Immaculate Conception School; Hialeah FL; Math Teacher  
1974 – 1977 Miami – Dade County Public Schools; Miami, FL; Jr. and Sr. HS Math Teacher  
1977 – 2006 IBM (International Business Machines); Armonk, NY; positions as listed  
2006 – 2012 Family Business and Civic Involvement (includes 3 years city budget meetings)

## Relevant Skills

Business Acumen  
Channels / Alliance Experience  
Communications, Presentations

- verbal / written
- cross level / cross-function

Contract Development  
Event Management  
Global Perspective

Leadership / Relationship Management  
Microsoft Excel, Power Point, and Word  
New Business Background  
Organizational Trust / Governance  
Program Development  
Project Management  
Sales / Marketing Experience  
Strategy Formulation

## Relevant Characteristics

Assertive  
Creative  
Deadline Sensitive  
Detail oriented  
Flexible  
Innovative  
Logical

Organized  
Persevering  
Professional demeanor  
Responsive  
Self-starter  
Team-Player  
Thorough