

Marina Coast Water District

Executive Recruitment and Placement for General Manager

February 5, 2014

SUBMITTED BY:
LINDA KEGERREIS
Chief Workforce Officer

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Your Path to Performance

February 5, 2014

Marina Coast Water District
11 Reservation Road
Marina, CA 93933
ATTN: Jean Premutati

Sent via e-mail to: jpremutati@mcwd.org

Subject: Request for Proposal – Executive recruitment and placement for the position of General Manager

Dear Ms. Premutati:

Thank you for the opportunity to submit a proposal to assist the Marina Coast Water District (the “District”) with the executive recruitment and placement for the position of General Manager. CPS HR Consulting (CPS HR) is extremely qualified to assist the District with this very important recruitment. We have vast experience in assisting public agencies with executive search, screening, and placement.

CPS HR offers a broad spectrum of human resource services while delivering personalized, results-oriented service, utilizing best practice methods of recruitment and selection strategies from our team of recruitment experts. It is our commitment to work in partnership with your organization to a successful result.

We possess a number of important strengths to assist the District in accomplishing the goals for this recruitment, including:

- **The successful completion of approximately 1,700 recruitments for more than 600 clients.** We have extensive experience in the recruitment of all types of local government, executive and professional staff, including council/board appointed executives, department directors, and key professional and management positions. Although our client list covers a broad range, please note that each recruitment we conduct is uniquely designed to fit the needs of the individual client and is calculated to provide a strong, competitive pool of candidates.
- **We have extensive experience recruiting for various** executives and managers for a variety of cities, counties, special districts and nonprofit entities. We understand and appreciate the intricacies of managing the executive recruitment for an organization and bring that expertise and knowledge to the recruitment process.

- **In-depth understanding** of all state and local government operations, programs, and services. This understanding has been gained as consultants to local governments throughout the United States.

Again, thank you for the opportunity to be considered for this assignment. We are prepared to make the process as smooth as possible for the Marina Coast Water District. Should you have questions or comments about the information presented in this proposal, please contact Pam Derby at 916-471-3126 or pderby@cpshr.us.

Sincerely,



Linda Kegerreis
Chief Workforce Officer
241 Lathrop Way
Sacramento, CA 95815

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Qualifications

CPS HR Consulting has extensive experience in executive recruitment services. Our Joint Powers Authority Charter specifies that we provide human resources consulting services only to other public agencies or non-profit organizations. Our wealth of recruitment experience has been gained through more than 25 years of placing top and mid-level executives in public agencies throughout the United States.

Examples of our experience include the following successful recruitments conducted in just the last year:

Client	Position
City of Anaheim, CA	Chief of Police
California Earthquake Authority	Executive Director
Carmichael Recreation and Park District	District Administrator
City of Chandler, AZ	Assistant City Manager
Coconino County, AZ	County Manager Chief Health Officer
East Bay Regional Parks District	Chief of Stewardship
Town of Gilbert, AZ	Fire Chief Public Works Director
City of Las Vegas, NV	Fire Chief
City of Maricopa, AZ	Development Services Director City Manager
Modesto Irrigation District	General Counsel Assistant General Manager
Monterey Peninsula Regional Park District	General Manager
City of Morgan Hill, CA	Community Development Director Community Services Director
Nevada Irrigation District	General Manager

Client	Position
Port of Los Angeles	Chief Technology Officer
San Diego Regional Airport Authority	Business Development Director
City of San Jose, CA	Operations Division Manager-Regional Wastewater Facility
Santa Clara Valley Water District	Deputy Operating Officer of the Water Utility Operations and Maintenance Division
Southern Nevada Health District	Chief Health Officer Director of Administration Human Resources Director
City of Surprise, AZ	Chief Financial Officer
Texas Parks and Wildlife	Human Resources Director
City of Vallejo, CA	Chief Assistant City Attorney

In the last five years we have successfully recruited and placed an impressive number of candidates in various management positions for water agencies or departments. Detailed information is presented in the References section of this proposal.

Our approach to this process is effective for a number of reasons which include:

■ **Our expert recruiting staff**

Our Executive Recruiters possess a high level of expertise in recruiting and placing qualified managers, directors, and executive professionals. We have a retention rate that averages more than five years. Our staff of experts includes an exceptional group of full-time employees as well as a full complement of subject matter experts, intermittent, and part-time employees with a wide variety of public and private sector experience. This allows CPS HR to precisely match the needs of the client with CPS HR's expertise and provide a wide range of services.

■ **High level of client satisfaction**

Our client satisfaction rating averages 4.6 on a scale of 5. A client satisfaction survey is sent at the end of every engagement requesting feedback on the quality of our staff, our deliverables, and the overall consulting relationship. The answers to these questions are then compiled and analyzed to identify client satisfaction ratings which are used as a factor within the CPS HR performance management system. The ratings are weighted

very highly in each employee's individual performance plan and annual performance rating to ensure CPS HR continues to deliver on the high level of client satisfaction our clients have a right to expect from us.

■ **We are a public agency**

As a public agency ourselves, we understand the challenges and issues you face. We share a common perspective with our clients; we understand how to work with and within government. Our consultants are drawn from public and private sector organizations, and employ strategy, innovation, and flexibility to find candidates who can work well in such a critical position for the District. We work collaboratively with you to generate creative and practical solutions. This understanding of public sector culture and policy sets CPS HR uniquely apart from our competitors.

Samples of Tools

As noted in Phase II, Task 2 in our following suggested Scope of Services, assessing candidates happens in a number of ways. Resumes are carefully vetted for the minimum qualifications advertised in the marketing materials, which are based on the desires of the District. In addition, a supplemental questionnaire will be developed in conjunction with the Board of Directors to provide information not easily obtained through resume materials. Subsequently, candidates who meet the minimum qualifications will participate in a thorough screening interview with the consultant (sample questions follow), either via telephone/video conference or in person if geographically permitting. These interviews last approximately one hour and are designed to ascertain administrative skills, management style, technical expertise, and organizational fit. In addition, several leadership evaluation tests are available to us through our association with Hogan Assessments. A description of the most popular assessment is provided in the Additional Services section and is a separate cost from those included in our Cost Proposal. A sample Client Report, which is what we use to outline recommended candidates, is also included on the following pages and includes information regarding the recruitment process, candidate profiles, candidate application materials, and supplemental questionnaires.

**District
GENERAL MANAGER
PRELIMINARY INTERVIEW**

Name: _____
Date: _____

1. What is it about this particular opportunity that caused you to apply?
2. Where does XXX fit in your career plans?
3. What do you know about XXX and what do you see as its primary areas of concern in the near and distant future?

Data:

Operating budget: \$
CIP \$
Overall budget
Staff:
Direct reports
Report to: _____

4. What are your strongest areas of expertise?
5. How do you establish and maintain a successful working relationship with the Board?
6. What experience have you had with: (technical areas determined by Board)
7. If hired, how will you establish yourself as the leader of the organization and get those under you, to follow your lead?
8. How do you monitor the performance of key managers and what do you do if someone is not meeting expectations?
9. What would your current boss(es) say he/she/they appreciate most about you?
10. What would peers or subordinates likely say in response to the same question?
11. How do you think the latter group would most wish for you to modify your style or approach?
12. What do you consider to be one or two of your most significant work-related accomplishments?

13 What kind of **legacy** will you be leaving behind in your current organization?
What will you be remembered for?

14 What do you consider to be your key strengths that you would bring to this position? Weaknesses, areas of improvement?

Baggage?

15 Any final comments or questions?

Terms of employment clear on resume? Yes No

Education: Confirm degrees / dates

Current salary: \$ _____

References provided? Yes No

CONSULTANT'S SUMMARY CONCLUSION:

Date, 2012

Client Agency Name

Recruitment for
(Position Title)

CONFIDENTIAL

SUBMITTED BY:

CPS HR Consulting
241 Lathrop Way
Sacramento, CA 95815
t: 916-471-XXXX f: 916-561-XXXX
E-mail
Tax ID: 68-0067209
www.cps.co.gov





Transmittal Letter goes here, if any

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Client Report
Recruitment for XXX

Summary of Activities

The following report presents the results of the recruitment process for the xxx position. Summary profiles of key candidates are included in the report for ease of comparison followed by resumes submitted by candidates.

The approach to the recruitment process was aggressive and included the following activities:

ADVERTISING

Advertisements for this position were placed in the following publications and web sites:

*Western City Website
Jobs Available
ICMA Newsletter/Website
NACO.org
NFBPA
International Hispanic Network
CPS Executive Search Website*

OUTREACH

- **Information Packet** - A brochure was prepared describing the position, the City, the characteristics of an ideal candidate, salary and benefits, and the application and selection procedure. The brochure was distributed to approximately xxx potential candidates and referral sources.
- **Personal Contacts** – Personal contacts were initiated with many xxx professionals to determine personal interest in the position or to request referrals of qualified candidates.
- **Candidate Follow-Up** – Follow-up contacts were made with strong potential candidates who we knew or who were identified through referrals. In addition, all those who submitted a resume received a letter of acknowledgement.

APPLICANT POOL

The response to the recruitment process was positive and included candidates with a variety of relevant backgrounds. XXX resumes have been received.

PRELIMINARY EVALUATION

The preliminary evaluation of candidates included the following steps:

- Each resume was evaluated against the City's needs as described in the recruitment brochure.
- XXX candidates, whose qualifications most closely fit the City's desired qualifications, were chosen to participate in preliminary interviews.

SCREENING CRITERIA

The criteria used in the preliminary evaluation of candidates was based upon the job profile established at the beginning of the recruitment process and included the following as noted in the brochure:

The ideal candidate will be an experienced local government executive or top-line assistant with a strong record of accomplishment, strategic planning, integrity, professionalism, and a significant background in budgeting, supervision, capital projects, and work with elected officials. This enthusiastic and results-oriented leader will bring outstanding communication, critical thinking, and interpersonal qualities.

Specific requirements are as follows:

Qualifications

Experience: At least five years of progressively responsible administrative experience in a management capacity in local government with an understanding of budget administration and supervision of professional staff is expected. Familiarity with strategic planning and administrative services such as human services or financial operations would be beneficial.

Education: A Bachelor's degree in public or business administration, or related field is required. A Master's degree is highly desirable.

Management Style

In addition to the above, the ideal candidate will be:

- a critical thinker with the courage to pursue creative ideas
- an excellent communicator, orally and in writing
- collaborative, inside and outside the organization

*Client Report
Recruitment for XXX*

- passionate about public service and community
- a proponent of the City's values and principles
- remains current with the profession, its trends and best-practices
- someone who values employees and supports their professional development
- a team player; in touch with other members regularly
- able to find common sense solutions
- a positive, "can do" advocate
- flexible

Scope of Services

Our Understanding of the Work to Be Performed

The Marina Coast Water District is interested in selecting an executive search firm to provide executive recruitment services for a new General Manager beginning in March 2014. The purpose of the District is to install and operate a water supply, water distribution system, and wastewater collection system. The District serves approximately 30,000 residents through 8,000 connections in its Marina and Fort Ord service areas and operates with an authorized staff of 40 full-time employees. The General Manager is responsible for organizing and directing the work of the District, subject to approval from the Board of Directors, and providing day-to-day leadership for the District. Additionally, the General Manager provides the necessary leadership for the District to continue its exceptional conservation efforts and work on diversifying water sources.

Key Stakeholder Involvement

The Board of Directors must be intimately involved in the search for a new General Manager. For this reason, our approach assumes their direct participation in key phases of the search process, including the development of the candidate profiles and recruitment strategies, the selection of final candidates, interviews with the finalists, and ultimately, the selection of a new General Manager. Additionally, at the discretion of the Board of Directors, other key stakeholders may also be invited to participate in focus group sessions, or round-table meetings to provide input for the development of the candidate profile.

District's Needs

A critical first step in a successful executive search is for the Board of Directors to define the professional and personal qualities required of the General Manager. To be certain this occurs, we have developed a very effective process that will permit the Board of Directors to clarify the preferred future direction for the District; the specific challenges the District is likely to face in achieving this future direction; the working style and organizational climate the Board of Directors wishes to establish with the General Manager; and ultimately, the professional and personal qualities that will be required of the General Manager.

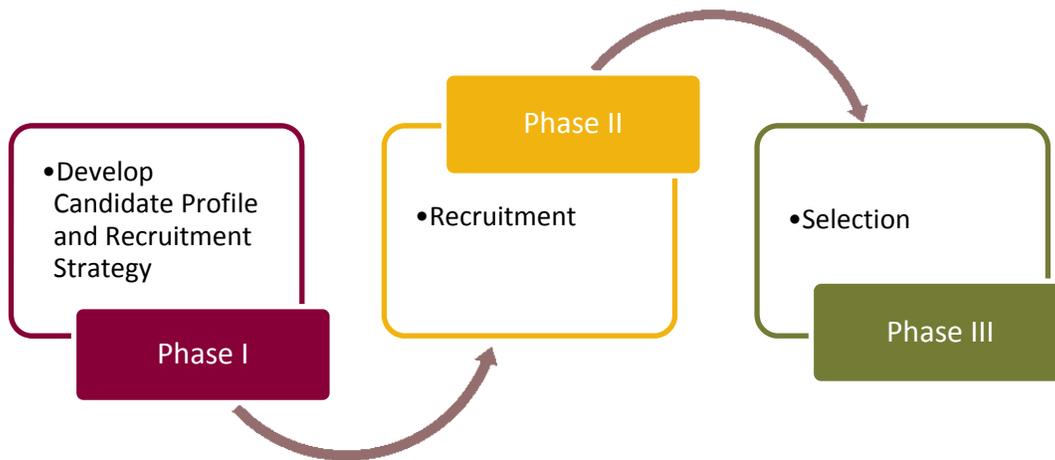
Assertive and Proactive Recruitment

The best candidates are often not actively seeking a new position. They may be very satisfied with their current situation, and may only consider a change if a more attractive career opportunity is presented to them. Yet, among potential applicants there are those who, though personally satisfied with their current situation, would rise to the professional challenge and apply for these positions. Evoking that sense of vision and opportunity in qualified persons is among the responsibilities of CPS HR. This is why we take an aggressive approach in identifying and recruiting the best available candidates.

Selection

The selection of the best available candidate requires the use of tools specifically designed to evaluate each candidate against the personal and professional qualities identified by the Board of Directors. For this reason, we tailor our selection techniques to the District's specific requirements. In addition, we also assume responsibility for administering the selection process for the District.

Detailed Outline



The executive search process presented below and on the following pages is designed to provide the District with the full range of services required to ensure the ultimate selection of a General Manager who is uniquely suited to the District's needs. Our process starts with Phase I, outlined below, where our consultant will meet with the Board of Directors and other District stakeholders as desired by the District, to ascertain the District's needs and ideal candidate attributes, to target our search efforts and maximize candidate fit with the District. From there, Phase II outlines the recruiting process, which is tailored to fit the District's specific wants and needs, with targeted advertising, combined with personal contacts with qualified individuals from our database. Finally, in Phase III, the selection process is also customized for the District. CPS HR will work with the Board of Directors to determine the process best suited to the Marina Coast Water District.

Phase I - Develop Candidate Profile and Recruitment Strategy

Task 1 - Review and Finalize Executive Search Process and Schedule

A critical first step in this engagement is a thorough review of the search process and schedule with the Board of Directors. This will ensure that the District's needs are met in the most complete manner possible.

Task 2 – Additional Key Stakeholder Meetings

As desired by the District, CPS HR is prepared to meet with the Board in March, or anytime thereafter, with any additional key stakeholders to obtain input in developing the ideal candidate profile and to assist CPS HR in understanding key issues and challenges that will face a new General Manager. The specific nature of the involvement process would be developed in consultation with the District. The results of the above activities will be summarized by CPS HR and provided to the District as an additional source of information for developing the candidate profile and selection criteria.

Task 3 - Development of Candidate Profile and Recruitment Strategy

This task will be accomplished during a workshop session involving the Board of Directors and CPS HR. It will result in the identification of the personal and professional attributes required for the position, and include the following activities:

- The Board of Directors will identify key priorities for the new General Manager.
- CPS HR will assist the Board of Directors in identifying the conditions and challenges likely to be encountered in achieving the priorities identified above.
- The Board of Directors will describe the type of working relationship they wish to establish with the General Manager.
- CPS HR will assist the District in generating lists of specific competencies, experiences, and personal attributes needed by the new General Manager in light of the analyses conducted above.
- CPS HR will present several recruitment and selection strategies for the District's consideration. The District will choose the recruitment and selection process most likely to produce the intended results.

Task 4 – Develop Recruitment Brochure and Place Advertisements

Following the completion of the workshop session, CPS HR will work with a professional graphic artist to design a recruitment brochure and present it to the District for review prior to printing (examples of current brochures are available for viewing on our website at www.cpshr.us/Search, and we have provided a copy of a sample brochure in the Sample Materials section). In addition, advertisements will be prepared and placed for publication in appropriate magazines, journals, newsletters, job bulletins, and websites to attract candidates on a nationwide, regional, local, or targeted basis, depending on the preference of the District.

CPS HR is focused on reaching a diverse candidate pool and would recommend publications/websites that are targeted to minority and female candidates. We are proud of our successful record of assisting our clients with placing over 170 minority and female candidates in executive positions over the past five years. CPS HR will specifically research other jurisdictions whose demographics mirror those of the Marina area and target outreach to those individuals. In addition to placing ads on websites aimed at minority candidates, we will contact leaders within appropriate associations to gain their perspective and referrals of possible candidates.

The recruitment brochure will also be available on our website, so that interested potential candidates can access the brochure (a link to the brochure is listed in the advertising). Additionally, we prepare an e-mail distribution list that is sent to prospective candidates and referral sources. The e-mail will have a direct link to the brochure embodied in the e-mail message. We also send letters and brochures directly to prospective candidates and referral sources soliciting interest in the position.

Phase II - Recruitment

Task 1 - Identify and Contact Potential Candidates

This very crucial task will include a variety of activities designed to attract the best available candidates. In addition to the placement of advertisements in appropriate professional journals, CPS HR will:

- Contact respected and experienced industry leaders to identify outstanding potential candidates on a referral basis. CPS HR maintains a comprehensive, up to date database of such professionals; however, we do not rely solely upon our current database. We also conduct specific research to target individuals relevant to your specific needs and expectations to ensure that we are thorough in our efforts to market this position to the appropriate audience to garner a diverse and quality pool of candidates. These individuals, as well as other potential candidates, are typically contacted very soon after they have received a recruitment brochure in order to maximize the impact of the multiple contacts.
- Select top quality candidates for consideration from past recruitments.
- Provide each potential candidate with a copy of the recruitment brochure transmitted with a personal letter.
- Contact potential candidates by telephone to explain the career opportunity, answer questions, and encourage them to submit a resume. Oftentimes this component necessitates multiple conversations with the same person to pique their interest and to answer their questions.

As a consulting firm that interacts with hundreds of public sector executives during engagements, we have a cadre of individuals who we inform of recruitments, both to increase the visibility of the opening and to attract appropriate individuals who fit the special needs of the client. Communication with these professionals, both via personal phone call and e-mail, ensures that an accurate picture of the requirements of the job is apparent and proliferated throughout their professional networks. The approach utilized by CPS HR employs the following techniques:

- Communicating to candidates, through advertising materials and verbally, a strong sense of the purpose and strategy of the District. For many talented individuals, understanding these aspects is one of the key motivators to compete in such an environment.

- Providing guidance and resources to candidates regarding the area's cost of living, mean and median housing prices, higher education opportunities, K-12 education information, and other aspects of interest to those who are considering a move to the area. We have found that potential candidates sometimes make the decision not to apply based on rumored information, rather than facts and research.
- Actively seeking individuals who are highly visible in the field – widely published, frequent presenters and/or thought leaders – who are seemingly ready for the challenge. These highly qualified candidates may be attracted by the prospect of collaboration with other departments, providing exceptional leadership to the Marina Coast Water District, or continuing to ensure the public confidence in the integrity of the District.

Task 2 – Resume Review and Screening Interviews

All resumes and supplemental questionnaire responses will be submitted directly to CPS HR for initial screening. This screening process is specifically designed to assess the personal and professional attributes the District is seeking and will include:

- A thorough review of each candidate's resume, supplemental questionnaire responses, and other supporting materials.
- Personal interviews with the candidates who appear to best meet the District's needs. This group typically includes approximately 10-15 candidates. CPS HR will spend extensive time ascertaining each candidate's long term career goals and reason(s) why the candidate is seeking this opportunity, as well as gaining a solid understanding of the candidate's technical competence and management philosophy. We will also gather data on any other unique aspects specific to this recruitment based upon the candidate profile.
- CPS HR will conduct internet research on each candidate interviewed, to include newspaper articles and blog checks.

CPS HR will conduct as many interviews in person that is reasonable within the timeframe and pricing matrix established with the District.

Task 3 – Board of Directors Select Finalists

At the conclusion of the previous tasks, CPS HR will prepare a written report that summarizes the results of the recruitment processes and typically recommends five to eight candidates for further consideration by the District. This report will include the candidate resumes and a profile on each interviewee's background. CPS HR will meet with the Board of Directors to review this report and to assist the District in selecting a group of finalists for further evaluation.

Phase III - Selection

Task 1 - Design Selection Process

Based on the results of the meeting conducted in Phase I, CPS HR will design a selection process to be utilized by the District in assessing the most qualified final candidates. This process will typically include an in-depth interview with each candidate, but may also include other selection tools such as an oral presentation, preparation of written materials and problem-solving exercises. CPS HR will meet with the District to review this process and discuss the District's preferred approach in assessing the final candidates.

Task 2 - Administer Selection Process

CPS HR will coordinate all aspects of the selection process for the District. This includes contacting both the successful and unsuccessful candidates, preparing appropriate materials such as interview questions; evaluation manuals; other assessment exercises; facilitating the interviews; and assisting the District with deliberation of the results of the selection tool(s).

Task 3 – Arrange Follow-up Interviews, Final Assessment Process, In-Depth Reference and Background Checks

Following the completion of the selection process, CPS HR will be available to complete the following components:

- *Reference Checks:* the in-depth reference checks are a comprehensive 360 evaluation process whereby we speak with current and previous supervisors, peers and subordinates. It is our policy to not contact current supervisors until a job offer is made contingent upon that reference being successfully completed so as not to jeopardize the candidates' current employment situation. The candidates are requested to provide a minimum of ten reference sources. CPS HR is able to ascertain significant, detailed information from reference sources due to our assurance and commitment to them that their comments remain confidential which leads to a willingness to have an open and candid discussion with CPS HR. A written summary of the reference checks is provided to the Client.
- *Background Checks:* we will arrange for a background records check of an applicant's driving record, criminal and civil court, and credit history, education verification, newspaper article research, and other sensitive items.

Task 4 – Contract Negotiation

Successful negotiations are critically important, and we are available to serve as your representative in this process. We have expertise in assisting other organizations in this area, and can advise you regarding current approaches to various components of an employment package. We can represent your interests with regards to salary, benefits, employment agreements, housing, relocation, and other aspects, with the goal of securing your chosen candidate.

Value-Added Customer Service

Throughout the outreach and screening process, we are committed to keeping the District fully informed of our progress. We will collaborate with you to provide updates on the status of the recruitment via your preferred method of communication (phone conference, email, etc.). In addition, during each phase in the process, we are either sending personal letters or initiating phone calls to candidates advising them of their status. We place a high level of importance on customer service and responding in a timely manner to all client and candidate inquiries. Our previous clients and candidates have expressed a sincere appreciation for our level of service and responsiveness to the management of the recruitment process. As a result, we have many long term relationships with clients that have resulted in the opportunity to assist them with multiple recruitments.

Additionally, our follow-up extends once you have selected the new General Manager. We will contact both the Board of Directors and the newly appointed General Manager within six months of appointment to ascertain if an effective transition has occurred.

Project Time Line

CPS HR is prepared to begin work upon receipt of a fully-executed contractual agreement. We can complete all search activities up to and including the selection of a new General Manager in 14 to 16 weeks. The precise schedule will depend on the placement of advertising in the appropriate professional journals, and the ability to schedule, as quickly as possible, the initial meeting. A proposed schedule of major milestones is presented below. CPS HR will work with the District to incorporate pertinent meetings into the District’s schedule of Board meeting dates.

Task Name	Month 1				Month 2				Month 3				Month 4			
Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16
Initial Meeting/Candidate Profile	➤															
Draft Brochure		➤														
Brochure Approved/Printed Place Ads			➤													
Aggressive Recruiting							➤									
Final Filing Date							➤									
Preliminary Screening										➤						
Present Leading Candidates to District											➤					
District Interviews													➤			
Reference/Background Checks														➤		
Appointment																➤
Weeks	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16

Consulting Staff

CPS HR Consulting has uniquely qualified executive recruiters to assist the District. Our staff members possess extensive recruiting experience and a direct, in-depth understanding of local government. Each of our recruiters routinely serves as an engagement or project manager and personally handles every aspect of the executive search process. For this engagement, Ms. Pamela Derby will be assigned as the recruiter. Her resume is presented below.

Pamela H. Derby

Profile

Since joining CPS HR Consulting in 2003, Pam Derby has conducted a wide range of recruitments for county, city, special district and association executives including city manager, assistant and deputy city manager, city attorney, executive director, general manager, fire chief, police chief, community and economic development director, human resource director, finance director, public works director, registrar of voters, library director, and director of information technology in addition to specialized support positions. Ms. Derby has conducted numerous General Manager recruitments for clients including the East Palo Alto Sanitary District, Discovery Bay Community Services District, McKinleyville Community Services District, and the Templeton Community Services District in addition to Executive Director/Officer recruitments for the Delta Stewardship Council, Rivers and Mountains Conservancy. She is currently conducting Executive Director/Officer recruitments for the Santa Clara Valley Habitat Agency and the San Francisco Estuary Institute. Past clients also include the City of San José Environmental Services Department, ACWA, and the Regional Water Authority (Sacramento).

Prior to joining CPS HR, Ms. Derby served as the Aide to the Yuba County Board of Supervisors serving as the Board's liaison to County Department Heads, the community, and the media. This experience provided her with a unique perspective into the special circumstances that exist in a Board/Council-Manager relationship and a keen awareness of the inner workings of local government. She is sensitive to balance the wants of the community with the needs of the District so as to tailor a recruitment process that reaches out to the most appropriate candidates and ensures a diverse group of individuals from which to make a selection. She has successfully employed these techniques in jurisdictions ranging from under 10,000 to 10 million. Moreover, she employs a firmly-held personal philosophy that candidates must be treated with the same respect and careful consideration as her client. Previous to her local government service, Ms. Derby served in the private sector and with several non-profit lobbying associations where she was responsible for the management of several large consumer groups.

Employment History

- Executive Recruiter, CPS HR Consulting
- Professional Management Consultant, CPS HR Consulting
- Administrative Technician, CPS HR Consulting
- Aide to the Board of Supervisors, Yuba County, CA
- Special Cases Manager, Consumer Relations, The Money Store, CA
- Supervisor, Trailing Documents, The Money Store, CA
- Executive Assistant, Randlett Associates, CA

Professional Experience

- Project manager for local government, special district and non-profit executive recruitments. Responsible for all facets of process including proposal interviews, all client meetings, creating marketing and advertising materials, conducting candidate screening interviews and developing finalist candidate interview processes.
- Assisted executive recruiting team in the recruitment of local government and public agency executives.
- Managed staff responsible for addressing escalated customer complaints. Negotiated and mediated pre-litigation settlements with attorneys, state regulators, and other state agencies, involving home improvement loans. Served as department fraud coordinator.
- Provided administrative support to SVP, including drafting correspondence, report writing and special projects as assigned. Supervised department receptionist, responsible for interfacing with vendors and facilities management.
- Provided administrative and research support for private professional lobbying firm. Researched legislative bills and corresponded with professional association members regarding legislative proposals.

Education

- California State University, Chico, major course emphasis – Physical Education/English

References

CPS HR Consulting has excellent references and we encourage you to contact them. We have listed below some of our recent similar recruitments.

CLIENT	POSITION	CONTACT
Arlington, TX, City of PO Box 90231 Arlington, TX 76004	Director of Water Utilities (2012)	Cindy Bezaury Director of Workforce Services 817-459-6869 Cindy.bezaury@arlingtontx.gov
Delta Stewardship Council 980 Ninth St., Suite 1500 Sacramento, CA 95814	Executive Director (2012)	Randy Fiorinia Council Vice Chair 209 495-2792 Randy.fiorini@gmail.com
East Palo Alto Sanitary District 901 Weeks Street East Palo Alto, CA 94303	General Manager (2013)	Joan Sykes-Mlessi Board Member 650 325-9021 sykes_miessi@sbcglobal.net
Florin Resource Conservation District (Elk Grove Water) 9257 Elk Grove Blvd. Elk Grove, CA 95624	Finance Manager (2011)	Mark Madison General Manager 916 685-3556 mmadison@egwd.org or Stefani Phillips Human Resources Administrator 916 685-3556 stefani@egwd.org
Florin Resource Conservation District 9257 Elk Grove Blvd. Elk Grove, CA 95624	General Manager (2011)	Barrie Lightfoot Board Chair 916 685-3556 barrielightfoot@comcast.net or Stefani Phillips Human Resources Manager 916 685-3556 Stefani@egwd.org

*Proposal to the Marina Coast Water District
Executive Recruitment for General Manager*

CLIENT	POSITION	CONTACT
McKinleyville Community Services District PO Box 2037 McKinleyville, CA 95519	General Manager (2012)	Helen Edwards Board of Directors hedwards@mckinleyvillecsd.com
McKinleyville Community Services District PO Box 2037 McKinleyville, CA 95519	Finance Director (2012) General Manager (2009)	Diane Sloane 707-839-1128 sloane@mckinleyvillecsd.com
Merced Irrigation District, CA 744 W 20 th Street Merced, CA 95340	Controller (2010)	Bob Blum Administrative Services Director 209 722-5761 bblum@mercedid.org
Modesto Irrigation District PO Box 4060 Modesto, CA 95352	Controller (2012) General Counsel (2013) Assistant General Manager, Finance (2013)	Irma Perrone Human Resources Director 209 526-7234 irmap@mid.org
Napa Sanitation District 935 Hartle Court Napa, CA 94559	Wastewater Treatment Plant Manager (2012)	Cheryl Schuh Human Resources Officer 707-258-6000 ext. 503 cschuh@napasan.com
Napa Sanitation District 935 Hartle Court Napa, CA 94559	Director of Administrative Services (2009)	Jeff Tucker Director of Administrative Services 707 258-6000 x512 jtucker@napasan.com
Nevada Irrigation District 1036 W Main Street Grass Valley, CA 95945	General Manager (2013)	Yvonne DuBose Human Resources Manager 530 271-6838 dubose@nidwater.com
Rivers & Mountains Conservancy 100 N Old San Gabriel Canyon Rd. Azusa, CA 91702	Executive Officer (2011)	Frank Colonna Board Chair frank.colonna@hotmail.com

*Proposal to the Marina Coast Water District
Executive Recruitment for General Manager*

CLIENT	POSITION	CONTACT
San Jose, CA, City of 200 E Santa Clara St San Jose, CA 95113	Operations Division Manager-Regional Wastewater Facility (2013)	Joanna De Sa Deputy Director of Environmental Services 408 635-2039 Joanna.desa@sanjoseca.gov or Marcela Bolanos Sr. Analyst-Human Resources 408 975-1449 Marcela.bolanos@sanjoseca.gov
San Jose, CA, City of 200 E Santa Clara St San Jose, CA 95113	Assistant Director, Environmental Services (2012) Deputy Director, Watershed Protection (2012) Deputy, Director, Wastewater Plant Operations (2012)	Linda Charfauros ESD Administrative Services Officer linda.charfauros@sanjoseca.gov
Templeton Community Services District 420 Crocker Street Templeton, CA 93465	General Manager	Jeff Hodge Former General Manager 661 821-4428 jhodge@bvcsd.org

Sample Materials



East Palo Alto Sanitary District



General Manager



THE COMMUNITY

A community with a rich history, East Palo Alto existed as an unincorporated "island" in San Mateo County until 1983 when it was incorporated by a vote of the residents. Located in San Mateo County in the heart of the Silicon Valley, the City is home to a diverse population of 28,000 within 2.5 square miles. The City is located only 30 minutes from San Francisco and 20 minutes from San Jose.

East Palo Alto residents enjoy the benefits of urban living. Two major international airports (San Francisco International and San Jose Mineta International) are just minutes away. The Bay Area's incomparable cultural and performing arts opportunities are unlimited and can be conveniently accessed. With the San Francisco 49ers, Oakland Raiders, San Francisco Giants, Oakland A's, San Jose Sharks, and the Golden State Warrior venues within short commuting distances, there are enough events to keep even the most serious sports fan engaged.

In the past 10-15 years, over 25% of East Palo Alto's older structures have been replaced with brand new housing and brand-name retail establishments including IKEA, Sports Authority, Home Depot, Nordstrom, Togo's, Starbucks, Office Depot, Mi Pueblo Grocery, and Best Buy, 6 to 9 Dental, Jamba Juice, and the Firehouse Grill.

Higher education interests are fulfilled by highly esteemed nearby academic institutions including Stanford University, University of California at San Francisco, and San Jose State University, among numerous others. Ravenswood City School District serves kindergarten through eighth grade students in East Palo Alto and surrounding communities. Sequoia Union High School District serves the City's high school age youth.

THE DISTRICT

The East Palo Alto Sanitary District (the District) is a Special District responsible for maintaining the sanitary sewers in the City of East Palo Alto, a portion of the City of Menlo Park, and an associated area in southeastern San Mateo County. The collection system carries wastewater from the District's service area to the Palo Alto Treatment Plant where it is treated and disposed of in a manner which meets federal and state standards.

The District was established in 1939 as a result of increased development in the East Palo Alto area. The initial sewer lines were installed as a WPA project. Construction began after the treatment contract with the City of Palo Alto was signed in 1940 and District facilities were put into operation on September 8, 1942.

Today, the District enjoys fiscal health and operates with a \$4.3M budget and small office staff. Operations and Maintenance are contracted services. The District has invested in its infrastructure and cutting-edge technology to stay up-to-date in order to responsibly serve its customers.

The District is governed by a five-member Board of Directors, elected by the registered voters residing within the District. The Board establishes the operating policies of the District; District employees carry out those policies on a day-to-day basis.

Vision, Mission, Core Values, and Norms

Vision: Recognized as an example of good government, public service and innovative leadership in the sanitary sewer services industry.

Mission: We provide safe, efficient and cost-effective sanitary sewer services to portions of East Palo Alto and Menlo Park.

Core Values: Quality Service, Commitment, Loyalty, Leadership, Vision and Clear Direction.

Norms:

1. Provide accurate, factual information (vs. speculation, hearsay).
2. Once decision is made, support it (vs. complain).
3. Respect and invest your support in each other's roles.
4. Exercise judgment that ensures quality service.
5. Provide each other with timely, accurate, complete responses and information.
6. Provide clear policy direction.
7. Represent self professionally and accurately.
8. Give quality service-driven responses.
9. Keep well informed, knowledgeable and current on district/industry issues.

THE POSITION

The Board of Directors has identified the following desirable qualities for their next General Manager. This vacancy exists due to the impending retirement of the long-time current General Manager.

Personal Traits and Competencies

- Organized
- Inspiring Personality
- Quick Starter
- Cultural competency
- Works well with everyone
- Good sense of humor
- Ability to effectively collaborate with staff, community and other agencies
- Effective oral communicator

- Able to effectively develop information/data and written reports
- Bilingual (Spanish/English) desirable

Governmental administration knowledge and experience

- Visionary; capability to see and plan for future; develop and implement strategic plans
- Experience in public sector finance and reporting
- Experience with public record management
- Knowledge of legal liabilities related to torts and contracts
- Experience working with and overseeing contractors/vendors
- Knowledge of principles of public relations/marketing for public agencies

District management knowledge and experience

- Experience with special districts
- Knowledge and experience in working with or for elected board of directors
- Experience establishing and maintaining effective interagency relations
- Knowledge of state and federal regulations related to wastewater/sanitary operations
- Working knowledge of EPASD is desirable

Staff oversight and supervisory/management experience

- Able to effectively manage staff
- Supervisory and managerial experience
- General knowledge of personnel laws and experience in dealing with human resources issues
- Operates in a fair and even handed manner

Technical knowledge and experience

- Scientific interest and understanding of operations and maintenance
- Knowledge of construction operations, construction standards and project management
- Knowledge of wastewater chemistry
- Engineering experience and background desirable

In addition, the Board has identified key goals for the next General Manager's first year of service, which include:

- Meet with and inform staff of role/behavior expectations related to Board relations
- Establish procedures and implement actions to make sure Board has packets, information for Board meetings and committees.
- Review and prepare a Board report on the status of and actions that could be taken to prevent leakage from groundwater/private sources into the District's wastewater system. This would include identifying pipes that are over capacity and recommendations to prevent spills
- Conduct a full OSHA compliance review internally; identify areas of compliance and for improvement; prepare report for Board with recommendations for actions
- Review the relevant ordinances governing and affecting the District's operations; report back to Board on any issues and recommendations for necessary changes



- Contact and meet other relevant organizations and groups to increase knowledge/ understanding and enhance public and community relations. Examples include representatives of City of East Palo Alto, Treatment Plant partner, local media, etc.
- Schedule and ensure initiation of team building activities/meeting with the 1) GM-Board and 2) GM-Staff
- Review organizational structure; create new/revised organizational structure and charts for short and medium term, as appropriate
- Create engineering strategy and report for Board consideration
- Update the District Safety Plan
- Conduct a review of all vendor agreements and services; provide report to Board
- Implement and follow-up on M.O.U. between Sanitary District and the City of East Palo Alto
- Meet and interview all staff; evaluate staff's strengths and weaknesses
- Identify and pursue additional revenue streams (including federal grants) possibly available to the District
- Develop a system for monitoring policy and regulation changes relevant to District operations and ways to inform the Board; plus develop recommendations for advocacy for/against such regulatory changes impacting the District
- Create a Technology Plan that includes at a minimum: televising meetings, website, electronic communication, GIS systems, Skype, Solar systems, technology for wastewater collections that improve efficiency, vendor or staff support mechanisms

- Increase the extent of televised lines
- Create plan to ensure quality services (for example: ISO 9002)
- Review status and prepare a Board report and recommendations on a plan for repair of laterals

THE IDEAL CANDIDATE

- Bachelor's Degree in engineering, water resources management, public administration, business or other related field
- Advanced degree in relevant field is a plus
- Five years of progressively responsible professional and complex management experience managing a staff of 5 or more
- Working knowledge of maintenance management systems
- Knowledge of intent and basic foundation of local, state and federal regulations and laws governing the management, construction, operation, safety and maintenance of a sanitary district
- Experience with another California wastewater district and/or water utility is a plus
- Understanding of engineering as it relates to wastewater collection is a plus
- Relevant technical knowledge and experience (such as engineering background) is a plus
- Familiarity with or a resident of the East Palo Alto Sanitary District service area is a plus

COMPENSATION AND BENEFITS

Compensation and benefits are competitive and negotiable.

APPLICATION PROCESS AND RECRUITMENT SCHEDULE

The final filing date is Monday, December 3, 2012. To be considered, immediately submit a cover letter, list of six work-related references (who will **not** be contacted without prior notice), indication of current salary and a resume that reflects the size of staff and budgets you have managed. Your resume should indicate both months **and** years of beginning/ ending dates of positions held. Submit the requested materials to:

CPS HR  CONSULTING

Pam Derby
CPS HR Consulting
241 Lathrop Way
Sacramento, California 95815
Phone: (916) 263-1401
Fax: (916) 561-7205
Email: resumes@cps.ca.gov
Web-site: www.cps.ca.gov/search

Resumes will be screened in relation to the criteria outlined in this brochure. Candidates with the most relevant qualifications will be invited to a preliminary screening interview conducted by the consultant followed by a panel interview with the Board of Directors. An appointment will be announced shortly thereafter, following follow-up interviews and thorough reference and background checks.



Sample Correspondence Included with Recruitment Brochure

Date

«FirstName» «MiddleName» «LastName»
«PositionTitle»
«OrganizationName»
«StreetAddress1»
«StreetAddress2»
«City», «StateAbbreviation» «PostalCode»

Dear «Salutation» «LastName»:

CPS HR Consulting is pleased to be assisting the **City/County of XXX/Agency Name** with its recruitment for a new **City Manager**. I hope you will take a moment to review the accompanying brochure and to call if you have a personal interest or would like to tell us about an outstanding potential candidate.

The City Manager reports to a five-member City Council and administers a total budget of approximately \$xx million that includes xx employees. The vacancy will exist by virtue of the upcoming retirement of the incumbent.

Xxxxxx is a full service city comprised of the following departments: police, fire, public works, finance, community development, and parks recreation and community services. Ideal candidates will possess a successful track record in local government management and demonstrate exceptionally strong leadership abilities. The City Council is desirous of attracting strategically driven professionals who are capable of guiding the organization toward a fiscally sound and high performing future. A history of innovation and resourcefulness, partnered with a passion for results and accountability will be weighted favorably. A Bachelor's degree is required.

The final filing date for this position is **Friday, XXX, 2012**. The salary range is competitive and will be dependent on experience and qualifications. An attractive benefits package is also offered. I look forward to discussing this excellent opportunity with you.

Sincerely,

Executive Recruiter
Enclosure

Candidate Evaluation Manual

Candidate Evaluation Manual

**POSITION
CITY OF XXX**

CONFIDENTIAL

submitted by:
CPS HR Consulting
241 Lathrop Way
Sacramento, California 95815
(916) 263-1401

Date

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Interview Questions	8
Rating Attributes Being Assessed	10
Preferred Ranking System	11
Candidate Profiles and Resumes	12

Schedule of Activities

City of XXX
POSITION
on
Day, __/__/__
At
City Hall
Address

8:00 – 8:30 a.m.	ORIENTATION
8:30 – 9:20 a.m.	
9:30 – 10:20 a.m.	
10:30 – 11:20 a.m.	
11:30 – 12:20 p.m.	
12:20 – 1:15 p.m.	LUNCH
1:15 – 2:05 p.m.	
2:15 – 3:05 p.m.	
3:15 – 4:00 p.m.	DEBRIEF

Evaluation Process Components

**Opening
Statement:**

At the beginning of each interview the candidates have been requested to make an opening statement highlighting their background and key qualifications for the **POSITION** for the **City of XXX**, and outline why they are seeking the position. Candidates have been instructed that such presentations should last 2-3 **minutes**.

**Structured
Interview:**

Following the opening statement, there will be **45 minutes** available for questions and answers. This period typically allows 12-14 questions to be answered. A menu of suggested questions designed to elicit information on areas the City previously identified as important are enclosed for your consideration. During the Orientation these and other job related questions might be selected.

**Unstructured
Questions:**

During the question/answer period panel members may also ask a limited number of unstructured questions, those unique to the background of the candidate, as time permits.

**Final
Comments:**

Once all questions have been asked, the candidate should be given a final opportunity to provide any additional information about his/her qualifications.

Following each interview, you will have approximately **10 minutes** to complete notes and get ready for the next interview.

Tips on Observing and Rating

1. Be familiar with the **candidate profile and key attributes** included in this manual prior to the interview process.
2. Suggested questions, designed to elicit information on key attributes being assessed, are provided on each **Interview Questions/Rating Notes Form**.
3. Write notes on the **Interview Questions/Rating Notes Form**, recording observations and significant direct quotations. The objective should be an accurate profile of the candidate to facilitate rating after the interview. Use a separate form for each candidate. Extra copies are in the side pocket of this manual.
4. A **Preferred Ranking Form** is enclosed for use in ranking candidates in relation to each other as the interviews progress. This should be completed after each interview. A sample form is enclosed at the end of this manual. The consultant will explain how to use the form.

Key Attributes Being Assessed

At the beginning of this recruitment, the City identified attributes of the ideal POSITION candidate. These attributes have been utilized during the recruitment and the preliminary screening of candidates. While many factors will contribute to the City's selection of a candidate for this position, a review of these attributes should assist greatly in the evaluation of candidates:

The ideal candidate will possess a strong background in municipal finance, staff management and a track record of providing sound, thorough recommendations on a myriad of complex issues. An unflappable and forthright demeanor coupled with the ability to effectively communicate and gain the respect of diverse and highly involved citizen groups will serve the candidate well. A history of innovation and resourcefulness will be weighted favorably as well as the ability to candidly share information with the Council. Success in this role will also require an understanding of the community's culture and becoming an integral part of the community at large.

Professional and Personal Characteristics:

- Knowledgeable local government generalist; understands civic process
- Track record of sound fiscal management coupled with a thorough understanding of the changing economic tides
- Skilled/proficient in labor negotiations
- Always conveys a sense of professionalism even in difficult and/or heated political environments
- Thick-skinned; able to deal with negativity
- Ability to absorb and analyze information and situations quickly but thoughtfully
- Thinks before speaking
- Good listener; open and approachable demeanor
- Unpretentious; able to work with all sectors of community
- Transparent/straight-forward; doesn't play games
- Good sounding board; gives Council 'space' to find own ideas
- Thoughtful, patient, open-minded
- Long range strategic planner
- An appreciation for a community committed to health, fitness and the environment

Candidate Evaluation Manual

- Understands relationship between every day delivery of services and Council policy setting
- Resourceful/innovative; ability to pick up Council idea and 'run with it'
- Open door; accessible to the community.

Interview Questions

This form contains space for recording notes on the oral presentation, contains suggested questions covering each of the attributes being assessed, and provides space for notes on the candidate's responses.

Candidate: _____ Date: _____

- A. WORK HISTORY / ORAL RESUME – 2-3 minutes
Will you please summarize your work experience and highlight elements of your career that you believe are especially relevant to this position.

- B. STRUCTURED INTERVIEW

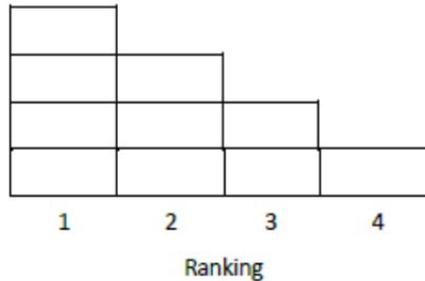
(interview questions would follow)

BRIEF OVERALL DESCRIPTION OF CANDIDATE'S PERFORMANCE DURING THE INTERVIEW:

CAREER DEVELOPMENT FEEDBACK FOR CANDIDATE:
(Summary of strengths, weaknesses, and suggestions for managerial development)

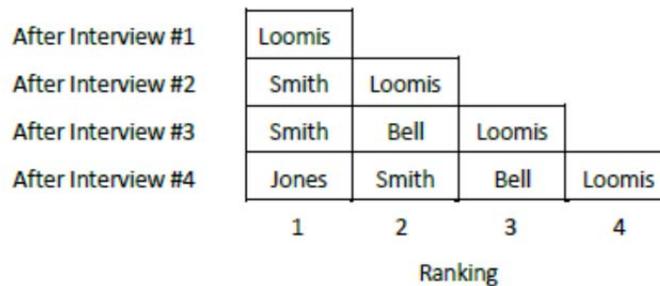
Preferred Ranking System

The Preferred Ranking System is used to rank candidates in relation to each other and to continually reassess rankings as the interviews progress. Below is a sample to show how the system works.



The blank form above is designed to rank a group of 4 candidates. A completed sample is shown below:

- Ms. Loomis is the first candidate interviewed and is ranked #1.
- Mr. Smith is interviewed next and is ranked #1; Ms. Loomis is moved to rank #2.
- After an interview with Ms. Bell, Smith is ranked #1, Bell #2 and Loomis #3.
- The next interview is with Mr. Jones who is ranked #1 above the three other candidates.



Remember, the best candidate should be ranked #1. It is recommended that rankings be made at the end of each interview. Please, no ties. Do not attempt to influence the rankings of other panel members. Following the final interview individual panel member rankings will be combined for panel review and discussion.

A Ranking Form for this interview is enclosed with this manual for your use.

Candidate Profiles and Resumes

Additional Services

CPS HR has a unique relationship with Hogan Assessment Services to provide its products to the government sector. As an international authority in personality assessment, Hogan has over 30 years of experience helping agencies evaluate leadership potential and predict job performance. Hogan's Leadership Forecast Potential Report, for example, outlines an individual's day-to-day leadership style, including behavioral descriptions and leadership competencies in terms of seven dimensions of normal personality that address a different component of leadership performance. Information on Hogan Assessment Services can be found online at www.hoganassessments.com. These optional reports are priced at \$150 per candidate and would be billed in addition to the costs outlined in this proposal. Please refer to Appendix A for a sample Hogan Leadership Forecast Potential Report.

Cost

Fees for Professional Services

The base professional fee for this executive recruitment service as outlined is **\$17,000**. Our professional fee covers all CPS HR services associated with **Phases I, II, and III** of the recruitment process, including the necessary field visits (up to three) to develop the candidate profile and recruitment strategy, assist the District in finalist selection, and facilitate candidate interviews with the District.

The request for proposal refers to a *compensation study*. Should the District require this study be completed by our Compensation and Classification group, it would require a separate quote. If it is acceptable to the District for our Executive Search technicians to acquire this information, there would be no additional fee.

Reimbursable Expenses

Actual out-of-pocket expenses for such items as consultant travel, advertising, marketing, long distance telephone, printing/copying, and postage/delivery charges are reimbursable at cost. There is no mark-up on expenses and we will work proactively with the District to ensure that the dollars being spent for expenses are in keeping with the District's expectations. Travel expenses for candidates who are invited forward in the interview process are not included under our reimbursable range. The listed reimbursable expenses range includes a background check on the selected finalist candidate.

Estimated Range \$5,000 - \$7,000

Professional fees and reimbursable expenses would be billed and paid monthly.

CPS HR Consulting Two-Year Guarantee

If the candidate selected and appointed by the District, as a result of a full executive recruitment, terminates employment for any reason before the completion of the first two years of service, CPS HR will provide the District with whatever professional services are required to appoint a replacement. Professional consulting services will be provided at no cost. The District would be responsible only for reimbursable expenses. The same applies if the initial recruitment efforts do not result in a successful appointment.

Approximate recruitment costs include:

- Brochure Design and Printing (\$1,500)
- Advertising (\$2,500)
- Mailings (\$200)
- Consultant travel (based on three trips including one overnight - approx. \$750)
- Background check - two candidates (\$800)
- Other recruitment expenses (supplies, shipping, long distance phone calls - \$200)

Why Choose CPS HR Consulting

We believe the advantages of using our expertise include:

- Our commitment to, and expertise with, public agencies
- Our aggressive outreach to qualified individuals who may not be seeking new employment
- Our ability to customize our process to fit your needs
- Our extensive experience in recruiting executive level professionals for public agencies across the United States
- Our growing list of returning clients who seek our services for multiple engagements
- Our proven ability to recruit and place minority and female candidates
- The clients and candidates who repeatedly compliment us on our timely and frequent communication and feedback
- Our ability to facilitate discussions and garner consensus with groups, including councils and boards

Why select CPS HR for this Important Effort

- We conduct a detailed needs assessment to identify 1) future organizational direction; 2) challenges facing the position; 3) the working style and organizational climate; and 4) required core and job specific competencies as well as personal and professional characteristics required
- CPS HR has a database of candidates for many jobs and an extensive network of external resources to leverage for executive-level positions
- We utilize our vast pool of public and nonprofit resources and contacts to deliver a strong pool of competitive candidates to the District who will be well prepared to assist the District in the accomplishment of its specific mission and goals
- CPS HR recognizes that the very best candidates for some types of positions are not typically looking for a job and, therefore, our recruitment team takes a very aggressive approach to identifying and recruiting such candidates
- We encourage applicant diversity and incorporate a variety of activities to attract the best available candidates
- The combination of CPS HR's seasoned recruitment management and highly qualified staff enable us to reliably deliver successful results on time and on budget

Thank you for reviewing our proposal. CPS HR Consulting would be pleased to partner with the Marina Coast Water District in this important endeavor. We are committed to providing quality, expert solutions to help you achieve your goals.

Appendix A – Sample Hogan Report

- SELECT
- DEVELOP
- LEAD

HOGANLEAD

POTENTIAL

STRENGTHS AND COMPETENCIES FOR LEADERSHIP

Report for: Kelly Warren

ID: UC195499

Date: March 17, 2009



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HOGAN **LEAD** POTENTIAL



INTRODUCTION

The Leadership Forecast Potential Report describes your strengths and developmental needs as a manager and executive. The report is based on the Hogan Personality Inventory (HPI), and is organized in terms of seven dimensions; each dimension addresses a different component of leadership performance. Leadership concerns building and maintaining a high-performing team, while getting people to forego individual goals to take on group goals.

Page 3 defines the dimensions of the HPI; once again, this report is organized in terms of these seven dimensions.

Page 4 presents your HPI profile. The pages following the profile describe the behavioral and leadership implications of your scores on each HPI dimension. The last section of the report provides developmental recommendations associated with your competencies. This information will be helpful as you move forward in your career.

BACKGROUND

There are some points you should keep in mind while reading this report. First, there is no such thing as a "good" score. There are positive and negative implications for both high and low scores, although certain scores are more important for some competencies than others. Thus, you should interpret your scores in terms of your own career aspirations and goals rather than in absolute terms.

Second, you can change your typical behavior, but change depends on three things. First, you need to know what you want to change. Second, you must decide to change it. And third, you need to know how to change it. The information in this report will be important for any effort toward change and development.

Third, the results in this report are based on leadership research conducted over the past 20 years with samples of working adults and leaders. In addition, your scores are compared to those of an international sample of over 4,000 executives, and not on the general population. The point is that the report compares you with your peers and not with your staff.

Finally, as noted above, the most essential feature of leadership is the ability to build and maintain a high-performing team. The various parts of the report all concern your potential for doing this.

Leadership concerns
building and maintaining a
high-performing team,
while getting people to
forego individual goals to
take on group goals.

HOGAN **LEAD** POTENTIAL



DEFINITIONS

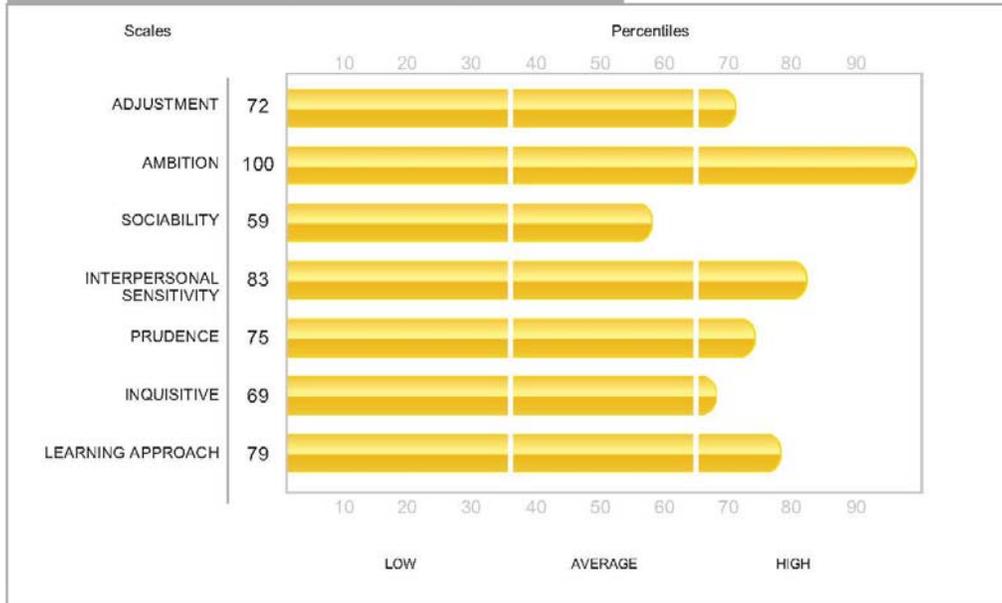
The seven scales of the Leadership Forecast Potential Report are defined as follows:

Adjustment	The Adjustment scale reflects the degree to which a person is calm and even tempered or conversely, moody and volatile. High scorers seem confident, resilient, and optimistic. Low scorers seem tense, irritable, and negative.
Ambition	The Ambition scale evaluates the degree to which a person seems leaderlike, seeks status, and values achievement. High scorers seem competitive and eager to advance. Low scorers seem unassertive and less interested in advancement.
Sociability	The Sociability scale assesses the degree to which a person appears talkative and socially self-confident. High scorers seem outgoing, colorful, and impulsive, and they dislike working by themselves. Low scorers seem reserved and quiet; they avoid calling attention to themselves and do not mind working alone.
Interpersonal Sensitivity	The Interpersonal Sensitivity scale reflects social skill, tact, and perceptiveness. High scorers seem friendly, warm, and popular. Low scorers seem independent, frank, and direct.
Prudence	The Prudence scale concerns self control and conscientiousness. High scorers seem organized, dependable, and thorough; they follow rules and are easy to supervise. Low scorers seem impulsive and flexible. They tend to resist rules and close supervision; however, they may be creative and spontaneous.
Inquisitive	The Inquisitive scale reflects the degree to which a person seems curious, adventurous, and imaginative. High scorers tend to be quick-witted and visionary, but they may be easily bored and not pay attention to details. Low scorers tend to be practical, focused, and able to concentrate for long periods.
Learning Approach	The Learning Approach scale reflects the degree to which a person enjoys academic activities and values education as an end in itself. High scorers tend to enjoy reading and studying. Low scorers are less interested in formal education and more interested in hands-on learning on the job.

HOGAN **LEAD** POTENTIAL



LEADERSHIP POTENTIAL PROFILE

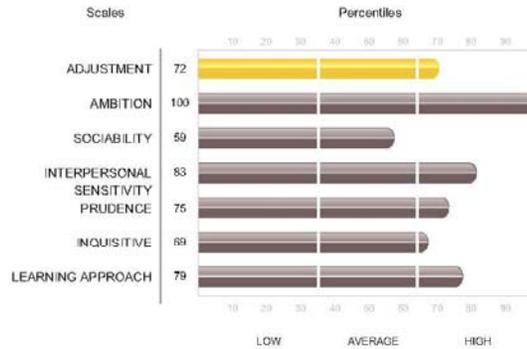


HOGAN *LEAD* POTENTIAL



ADJUSTMENT

Concerns composure, optimism, and stable moods.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Handle pressure well
- Not take criticism personally
- Expect to succeed
- Be hard to coach
- Overlook their mistakes

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you usually maintain a positive attitude, stay in a good mood, remain patient with staff errors and mistakes, and persist in the face of challenges, frustration, and reversals. On the other hand, you may not realize when others are stressed, and may be reluctant to listen to negative feedback.

HOGAN **LEAD** POTENTIAL



COMPETENCY ANALYSIS

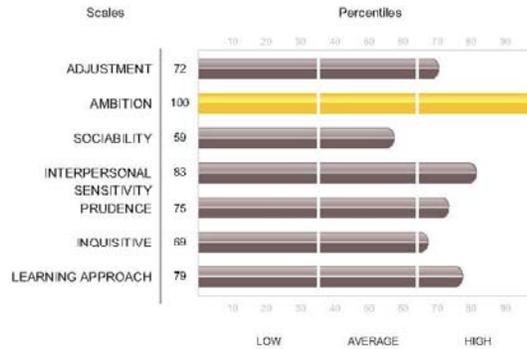
- **COMPOSURE:** You tend to remain calm even when provoked, or faced with deadlines and heavy external pressure. You are perceived as confident and self-assured, and you express your emotions in a mature and socially appropriate manner.
- **LISTENING:** You are so confident in your judgments that you may sometimes seem not to take others' views seriously. As a result, others may see you as arrogant, regardless of the merit of your views.
- **LEARNING AND PERSONAL COACHABILITY:** You are open to and may even solicit feedback. At the same time, because you are so self-confident, you may tend to focus on the positive and ignore the negative. This can make you hard to coach.
- **BUILDING RELATIONSHIPS:** Your positive mood and predictable demeanor should make you a rewarding person to deal with; you should have good success building and maintaining relationships when you choose to do so.
- **STRESS MANAGEMENT:** You seem to deal comfortably with frustrations, delays, and the pressures of deadlines and heavy workloads. In fact, you appear to thrive under pressure, perhaps taking on more than you should. Others admire and count on your resilience.

HOGAN *LEAD* POTENTIAL



AMBITION

Concerns taking initiative, being competitive, and seeking leadership roles.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Enjoy taking charge and making decisions
- Accept difficult challenges
- Enjoy public speaking
- Intimidate younger or more junior people
- Seem eager to advance

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you are active, hard working, competitive, and eager to get ahead. You like leadership positions and enjoy being in charge. With the appropriate experience and interpersonal skills, you will be able to assume lead roles on complex projects. On the other hand, you may tend to compete with or intimidate colleagues without intending to do so.

COMPETENCY ANALYSIS

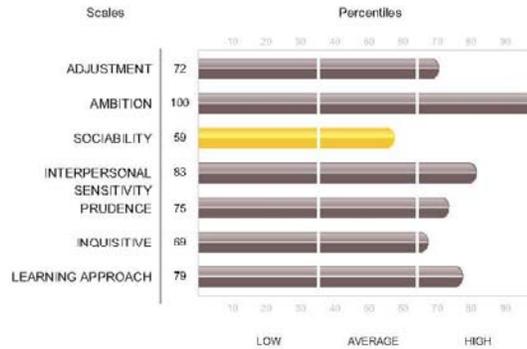
- **ACTION ORIENTATION:** You are hard working, competitive, and want to succeed. People can depend on you to take initiative, solve problems, and get things moving.
- **CAREER ADVANCEMENT:** You have a sense of what you can accomplish, and you have the energy and confidence to make things happen. You seem willing to push projects through to completion.
- **INITIATIVE:** You have the confidence and desire to lead during a crisis. Others often look to you for direction and you like to provide it. Others expect you to do what needs to be done when problems arise, without being asked.
- **ACHIEVING RESULTS:** You take pride in getting things done; others expect that you will push yourself and your staff to finish projects and exceed goals.
- **DECISION MAKING:** You are not afraid to make decisions, even when all the information isn't available. However, you may need to practice delegating decision making when it is appropriate.

HOGAN *LEAD* POTENTIAL



SOCIABILITY

Concerns seeming talkative, socially bold, and entertaining.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Seem approachable, not distant
- Be comfortable either working alone or with others
- Prefer formal rather than casual meetings
- Provide staff relevant feedback
- Balance listening with talking

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you are flexible with your time, and don't mind working either alone or as part of a team. You meet the public well, but you don't need to be the center of attention or constantly on stage.

COMPETENCY ANALYSIS

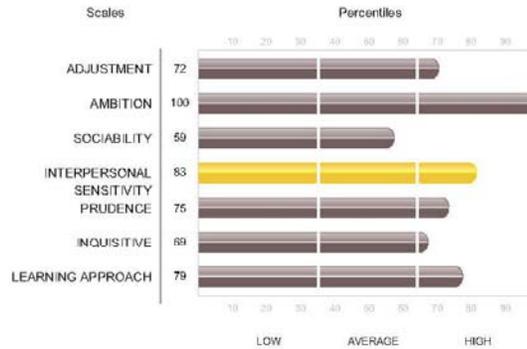
- **INITIATING INTERACTIONS:** You are able to initiate and build good relations with others in your organization, including people you don't already know.
- **ENERGY:** Others see you as having appropriate energy and enthusiasm for new people and projects.
- **APPROACHABILITY:** Your ability to initiate interactions with new people is an important skill for leaders. Continue developing contacts in the organization, and include your staff in the interactions.
- **INTERPERSONAL NETWORK:** Your networking skills are sufficient to keep you in touch with the organization.
- **TEAM ORIENTATION:** Others see you as participating appropriately in team tasks.

HOGAN **LEAD** POTENTIAL



INTERPERSONAL SENSITIVITY

Concerns being agreeable, considerate and skilled at maintaining relationships.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Be pleasant and rewarding to deal with
- Be socially appropriate and good team players
- Read social and political cues easily
- Promise more than they can deliver
- Avoid confrontations

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you dislike conflict, and try to maintain cordial relations with others. You are a good team player and value encouraging and helping others. Your staff should like and trust you, but just might try to take advantage of your good nature.

COMPETENCY ANALYSIS

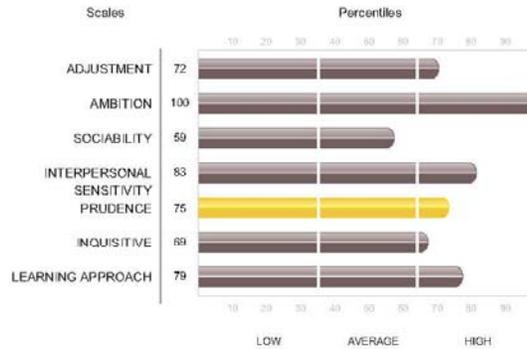
- **COMPASSION:** You are a thoughtful and considerate person, you appreciate how your actions will affect others, and you avoid offending people unnecessarily.
- **COOPERATION:** You value cooperation, you are a great team player, and you provide a model for your staff and others regarding how to accomplish goals through collaboration.
- **SEEKING INPUT:** You respect others and seek their input, especially regarding issues that will affect them personally.
- **CONFRONTING SUBORDINATES:** Because you value cooperation and you dislike upsetting people, you may find it difficult to confront problem performers.
- **STANDING ALONE:** You seem uncomfortable taking unpopular positions, especially when doing so may annoy others, and you tend to avoid confrontations.

HOGAN LEAD POTENTIAL



PRUDENCE

Concerns being conscientious, dependable, and rule-abiding.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Work hard for the company
- Follow company rules and procedures
- Plan work in advance and anticipate changes in the workload
- Have trouble delegating, and tend to micromanage their staff
- Get bogged down in details

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you are a hard working and solid organizational citizen. You are concerned about rules, procedures, and task clarity. You value doing things right and try to meet high standards of performance. Others will see you as careful and conscientious, but perhaps also as inflexible and needing a lot of structure.

COMPETENCY ANALYSIS

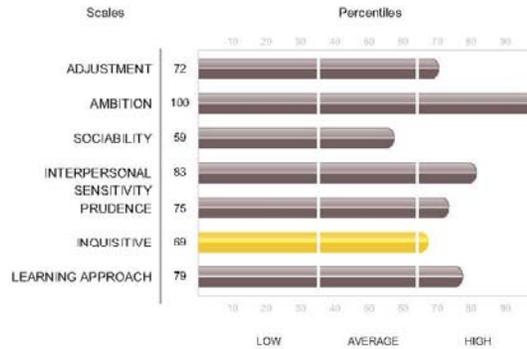
- **HANDLING AMBIGUITY:** When starting new projects, you prefer to have the expectations, rules, and guidelines spelled out carefully in advance, so you will know how you are doing and how you will be evaluated.
- **FLEXIBILITY:** You prefer to use established methods and procedures in your work, especially when the stakes are high, rather than experimenting with new techniques that might not work.
- **PLANNING:** You tend to plan your work carefully in advance, estimating time, steps, personnel, and resources required for tasks. You are most comfortable when goals, timetables, and a firm understanding of obligations are in place.
- **ATTENTION TO DETAIL AND TIMELINES:** You want your work to be technically accurate and completed on time. Others see you as organized, conscientious, and punctual.
- **RULE ORIENTATION:** You respect the rules of the organization, you follow them carefully, and you expect others to do so as well.

HOGAN *LEAD* POTENTIAL



INQUISITIVE

Concerns being curious, imaginative, visionary, and easily bored.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Be seen as visionary about business
- Think quickly on their feet and help solve problems
- Understand and talk about the "big picture"
- Be seen as worldly and sophisticated
- Become easily bored with implementation or repetitious tasks

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you think quickly on your feet, generate lots of ideas, and are curious about how things work. You understand the big picture and can be creative and even visionary. Others will see you as original and imaginative, but easily bored, especially with the details of implementation.

COMPETENCY ANALYSIS

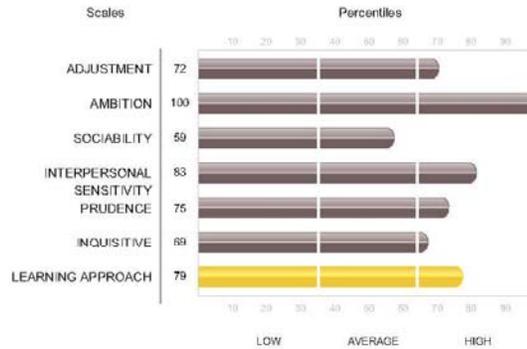
- **CREATIVITY:** You should be a resource for your organization when it needs to solve problems that require thinking outside the box.
- **MANAGING INNOVATION:** You seem interested in trying new technology, processes, and problem-solving methods to improve the speed and quality of your work.
- **CURIOSITY:** You are an open-minded person with a wide range of interests; as a result, you like to have more than a superficial understanding of how things work.
- **VISION:** You think about the future of the business and enjoy reviewing strategies for getting there.
- **PROBLEM SOLVING:** Your ability to think "outside the box" and in terms of the big picture is a competency that should enhance your career within the organization.

HOGAN **LEAD** POTENTIAL



LEARNING APPROACH

Concerns enjoying formal education and actively staying up-to-date on business and technical matters.



BEHAVIORAL IMPLICATIONS

Leaders with similar scores tend to:

- Value training for themselves and their staff
- Stay up-to-date with recent developments in business and technology
- Be self-disciplined and conscientious about goals
- Take action before others are on board
- Have an opinion about everything

LEADERSHIP IMPLICATIONS

Compared to other leaders, your scores suggest that you like to learn and acquire new knowledge. You will value training for yourself and others and will want to apply the latest relevant knowledge to your work. Although your friends may think of you as bright and well-informed, others may think you sometimes show off your knowledge.

COMPETENCY ANALYSIS

- **STAYING CURRENT:** You should find it easy to stay up-to-date on recent business trends and relevant developments in your industry.
- **LEARNING QUICKLY:** You should also find it easy to learn new techniques and procedures, because you remember new material easily.
- **LEARNING STYLE:** You seem to enjoy traditional forms of education, including lectures and reading.
- **COMMUNICATING ACCURATELY:** Your written communications should be clear and accurate.
- **INTELLECTUAL MOTIVATION:** Others see you as bright, hard-working, and achievement-oriented.

HOGAN **LEAD** POTENTIAL



DEVELOPMENTAL RECOMMENDATIONS

The following developmental recommendations concern the dimensions where your score was in the MODERATE or HIGH RISK ZONE.

ADJUSTMENT

COMPOSURE:

- Because many people don't handle frustration and setbacks as well as you do, share with others the tips and techniques that you have found to be helpful when things don't go well.
- Because you are so confident, you may not realize when others are feeling stressed. As a leader, be sure to convey to your staff an appropriate sense of understanding of their problems.

LISTENING:

- Use active listening skills and positive body language – remember to paraphrase, reflect on what others have said, and don't interrupt them.
- Try to display a genuine interest in what is being said by others--people can sense when you are "going through the motions" rather than actively listening to them.

LEARNING AND PERSONAL COACHABILITY:

- Don't ignore criticism, particularly if you receive the same message from various sources.
- Ask your coworkers and colleagues for feedback. Ask yourself, "What do others keep telling me?" Pay attention to recurring themes in what you hear.
- Identify a trusted colleague who can give you honest feedback, and regularly ask him/her for this information. Before meetings, presentations, or customer contacts, ask your colleague to observe your performance and provide a later critique (this will help your colleague focus on your behavior, and he / she will be able to give you more useful feedback).

BUILDING RELATIONSHIPS:

- People will appreciate your calm, steady demeanor. Because others become stressed when you don't, step up and use your skills to calm and motivate them.
- Because you are probably good at building relations with others, become a mentor in this area.

STRESS MANAGEMENT:

- You seem to handle pressure and stress so well that others may not believe you are as "concerned" as you should be. As a leader, it is important that you convey an appropriate level of involvement to your staff.
- Try not to pile work on others because you are not feeling any pressure, or because you feel that others can handle as much as you can.

HOGAN **LEAD** POTENTIAL



AMBITION

ACTION ORIENTATION:

- Part of being a leader involves developing the skills of other employees. Be careful not to compete with your staff, or even seem to do so.
- Although being action-oriented is desirable, careful planning frequently leads to better decisions. As a leader, be careful not to treat every issue as urgent—use rapid responses in situations that require it.

CAREER ADVANCEMENT:

- Given your intensity and competitiveness, be careful not to alienate your peer group. When possible, gain consensus on your plan(s), communicate with your peer group, delegate to others, and share successes with all.
- Ask someone whom you trust for feedback about your work as a team member. If the feedback is not positive, create an action plan for improvement.
- Support the careers of your staff and colleagues. Involve others in projects, delegate tasks when possible, and look for opportunities to partner with other groups on projects.

INITIATIVE:

- Don't take on more than you can handle. Unfulfilled promises can erode others' trust.
- Realistically evaluate what your team can accomplish and resist the tendency to over-commit your team's resources.
- Remember that not everyone has your level of intensity. Be careful not to burn out your staff. Being goal-oriented is desirable, but be aware of signs of disengagement and/or burnout on the part of others.

ACHIEVING RESULTS:

- You have high expectations for staff performance, but not everyone shares this orientation. Be sure to let others know what your expectations are, and then manage them accordingly.
- Be careful when pushing others--their capacity and/or skills may not equal yours.

DECISION MAKING:

- Before making a decision, make sure you review all the relevant information regarding the decision. Remember the carpenter's adage: "Measure twice, cut once."
- You probably make decisions quickly and confidently. As a result, others may rely on you to make decisions, which won't enhance their skills. Therefore, delegate down, make your subordinates responsible for the decisions in their work area.

HOGAN **LEAD** POTENTIAL



SOCIABILITY

INITIATING INTERACTIONS:

- Be sure to talk with each member of your staff everyday in his/her work place.

ENERGY:

- You seem to be an active person who can energize the work group, which is an important quality for leaders. Maintain your energy during interactions, particularly if you tend to become bored or disengaged.

APPROACHABILITY:

- Make sure that you are accessible to all members of your team, and that you don't unconsciously "play favorites" with some team members.

INTERPERSONAL NETWORK:

- Be sure that your network covers the relevant portions of your organization.
- Even though you may have a good organizational network, try to establish a relationship with at least one new department or work unit each quarter.
- Recognize that your network is changing, and that it needs to be nurtured to be sustained. If you haven't talked to a particular person recently, call him/her. Don't let relationships become stagnant or distant.

TEAM ORIENTATION:

- You seem to be comfortable either working as part of a team or by yourself. This balance is healthy because some tasks are best done as part of a team, while others are best done individually.

HOGAN **LEAD** POTENTIAL



INTERPERSONAL SENSITIVITY

COMPASSION:

- As a leader, you will sometimes have to make tough decisions. Learn that although you may have to confront others, you can still remain friends.
- Because you are a considerate and tolerant person, some people will try to take advantage of your good nature.

COOPERATION:

- In trying to be helpful, don't promise more than you can deliver. Evaluate your current situation before taking on additional tasks or requests from others.
- Management by consensus is not always appropriate. Learn when to consult your staff and when to make independent decisions.

SEEKING INPUT:

- When asking others for feedback, don't focus solely on the positives or the negatives—try to walk away with 2-3 of each.
- Be selective about whom you ask for feedback, because giving feedback can be an emotionally draining task for others.

CONFRONTING SUBORDINATES:

- Giving your staff timely feedback will produce better results. Not giving it causes inefficiencies and can create perceptions of favoritism.
- Make your performance expectations clear up front. That way, you will set standards and feel comfortable addressing future shortcomings.

STANDING ALONE:

- Your staff counts on you to express their concerns to the senior management in the organization. If you don't, then your work group will begin to doubt your leadership. Stick up for your staff.
- Your tendency to avoid confrontations and contentious situations may undermine your effectiveness as a leader. Be prepared to endure occasional unpleasantness.

HOGAN **LEAD** POTENTIAL



PRUDENCE

HANDLING AMBIGUITY:

- Even the most careful plan will change, and change is an inevitable part of organizational life. As a leader, you must be able to deal with changes. Identify someone in your organization who adapts well to change and try to learn from this person.
- You will never have enough information to make the best possible decision; life is about making decisions with the information you have. Make a list of what you need to know and then act.

FLEXIBILITY:

- You may try to complete every task equally well; if so, learn how to prioritize your work.
- You are well-organized and planful, and this involves using rules and procedures; but what may seem like a good rule today can become an obstacle tomorrow. Therefore, be selective about introducing new rules and procedures.
- Be sure you delegate decision making to those persons who will have to live with the decision, and do not make it yourself.

PLANNING:

- You have strong planning and organizing skills. Help others who are not as planful to achieve their goals, and ensure that they remain responsible for completing their own work.
- Tell others about your schedules, plans, and deadlines. If they know what you expect, they will be better able to meet your targets.

ATTENTION TO DETAIL AND TIMELINES:

- Your strengths include thoroughness and attention to detail. Such strengths can become weaknesses if you micro-manage your staff. Give your staff freedom to succeed and encourage them to approach you with questions.

RULE ORIENTATION:

- Challenge existing rules if they are no longer appropriate. Don't blindly follow rules just because they are on the books; review them in terms of business necessity.
- You should remember that "rule breakers" sometimes have ideas and/or insights that others may lack. Stay objective and listen to their side of the story.

HOGAN **LEAD** POTENTIAL



INQUISITIVE

CREATIVITY:

- You are likely to be good at developing novel approaches to solving problems. However, not every problem requires a new solution. Try to determine whether an acceptable solution to the problem at hand already exists.
- Innovation and creativity have a price—namely, the time needed to develop unique solutions is time away from other duties. Keep track of the ROI for any rework, changes, or new strategies you adopt. Set a time and dollar limit for new projects and when you exceed them, learn to move on.

MANAGING INNOVATION:

- Technology may not be the answer to every problem. Identify the best practices on a topic before adopting new technology as a solution.
- Don't become so taken by technology that you miss straightforward logical solutions.

CURIOSITY:

- Effective leaders like to understand how things work, and they ask lots of questions. You probably do this, too. At some point, however, further questioning has little ROI. Therefore, continue seeking information about "hows" and "whys", but put some limits on your investigations, so that you have sufficient time to complete projects.

VISION:

- You probably enjoy thinking about long range issues and problems. Be sure that you also spend time on important current problems.
- Make sure that you have a sound rationale for your ideas, and present it carefully--you need to "sell" your ideas to others to ensure their commitment and support. Ask colleagues for feedback on your ideas and how well you are communicating them.

PROBLEM SOLVING:

- Be sure that your organization is aware of your strengths—visioning and strategic planning—and be a resource to other groups in these areas.
- Understand when a problem can benefit from a down-to-earth solution.

HOGAN **LEAD** POTENTIAL



LEARNING APPROACH

STAYING CURRENT:

- Your interest in remaining up-to-date will enhance your effectiveness. You also tend to have an answer or opinion on most topics, and you are usually right. However, when appropriate, let others solve problems on their own. Doing so is an essential development experience for them.
- Share with others your techniques for staying up-to-date. Build a learning environment within your own team, perhaps by holding information sessions or group Q&A sessions, discussing topical books and publications, sharing your vision of the company's future, and so forth.

LEARNING QUICKLY:

- Remember that others may not learn as fast as you do. As a leader, your learning speed may intimidate others—be aware of this, and try to make others feel comfortable as they learn at their own rate.

LEARNING STYLE:

- You are likely to be comfortable in a classroom environment and may even prefer this style of learning. Learn to profit from hands-on and demonstration-style experiences, too.
- As a leader, do not assume that all of your team members learn as you do. Get to know your people, and try to match their developmental experiences with their individual learning styles.

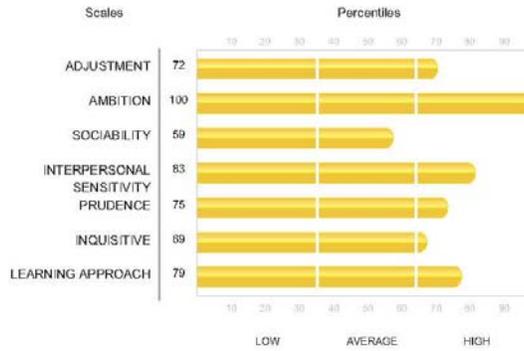
COMMUNICATING ACCURATELY:

- Your staff probably finds your memos and instructions easy to read and understand. Use your strengths in this area to mentor and coach others who do not write as well as you. Remember to use tact when correcting others.

INTELLECTUAL MOTIVATION:

- Continue to set high standards for yourself and your staff regarding both job-specific and managerial/leadership training. Create a learning environment within your work group.
- Pursuing training for yourself and others is laudable, but training costs money. Therefore, do not go to training programs simply because they are available. Instead, review the contents of the course, and only attend programs or seminars that are likely to be worthwhile for you and/or your team.

HOGAN LEAD POTENTIAL



Subscale Scores (No. items endorsed / No. items in subscale)

Adjustment		Ambition		Sociability	
2. Empathy	3 / 5	10. Competitive	5 / 5	16. Likes Parties	3 / 5
3. Not Anxious	4 / 4	11. Self-Confident	3 / 3	17. Likes Crowds	3 / 4
4. No Guilt	5 / 6	12. Accomplishment	6 / 6	18. Experience Seeking	5 / 6
5. Calmness	3 / 4	13. Leadership	6 / 6	19. Exhibitionistic	1 / 5
6. Even Tempered	4 / 5	14. Identity	3 / 3	20. Entertaining	2 / 4
7. No Complaints	5 / 5	15. No Social Anxiety	6 / 6		
8. Trusting	3 / 3				
9. Good Attachment	4 / 5				

Interpersonal Sensitivity		Prudence		Inquisitive	
21. Easy To Live With	5 / 5	26. Moralistic	1 / 5	33. Science Ability	1 / 5
22. Sensitive	3 / 4	27. Mastery	4 / 4	34. Curiosity	3 / 3
23. Caring	4 / 4	28. Virtuous	3 / 5	35. Thrill Seeking	3 / 5
24. Likes People	6 / 6	29. Not Autonomous	3 / 3	36. Intellectual Games	2 / 3
25. No Hostility	3 / 3	30. Not Spontaneous	3 / 4	37. Generates Ideas	4 / 5
		31. Impulse Control	4 / 5	38. Culture	4 / 4
		32. Avoids Trouble	5 / 5		

Learning Approach	
39. Education	2 / 3
40. Math Ability	1 / 3
41. Good Memory	4 / 4
42. Reading	4 / 4