



MASTER SERVICES AGREEMENT #2024-019
Executive Search Consulting and Related Services

THIS MASTER SERVICES AGREEMENT (“Agreement”), effective the last date of signed approval (“**Effective Date**”), is entered into by and between the **North Central Texas Council of Governments (“NCTCOG”)**, a Texas political subdivision and non-profit corporation, with offices located at 616 Six Flags Drive, Arlington, TX 76011, and

Strategic Government Resources, Inc. (“Contractor”)
with offices located at
6402 Glen Abbey
Abilene, TX 79606

ARTICLE I
RETENTION OF THE CONTRACTOR

1.1 This Agreement defines the terms and conditions upon which the Contractor agrees to provide Executive Search Consulting and Related Services, (hereinafter, “Services”) to governmental entities participating in the TXShare program (hereinafter “Participating Entities”). The Contractor is being retained to provide services described below to Participating Entities based on the Contractor’s demonstrated competence and requisite qualifications to perform the scope of the services described herein and in the Request for Proposals #2024-019 (hereinafter, “RFP”). In the event of a conflict between this Agreement and the RFP, this Agreement will prevail. The Contractor demonstrated they have the resources, experience, and qualifications to perform the described services, which is of interest to Participating Entities and was procured via the RFP. NCTCOG agrees to and hereby does retain the Contractor, as an independent contractor, and the Contractor agrees to provide services to Participating Entities, in accordance with the terms and conditions provided in this Agreement and consistent with Contractor’s response to the RFP.

ARTICLE II
SCOPE OF SERVICES

2.1 The Contractor will provide Services described in a written Purchase Order issued by NCTCOG or a TXShare Participating Entity. Any such Purchase Order is hereby incorporated by reference and made a part of this Agreement and shall be subject to the terms and conditions in this Agreement. In the event of a conflict between any term or provision in this Agreement and any term or provision in a Purchase Order, the term or provision in this Agreement shall control unless the conflicting term or provision in this Agreement is referenced, and expressly stated not to apply, in such Purchase Order.

2.2 All Services rendered under this Agreement will be performed by the Contractor: i) with due care; ii) in accordance with generally prevailing industry standards; iii) in accordance with Participating Entities’ standard operating procedures and applicable policies, as may be amended from time to time; and iv) in compliance with all applicable

laws, government regulatory requirements, and any other written instructions, specifications, guidelines, or requirements provided by NCTCOG and/or Participating Entities.

2.3 Any agreed-upon changes to a Purchase Order shall be set forth in a subsequent Purchase Order amendment. Contractor will not implement any changes, or any new Services until a Purchase Order has been duly executed by Participating Entity. For the avoidance of doubt, the Contractor acknowledges that Participating Entity is under no obligation to execute a Purchase Order. Participating Entity shall not be liable for any amounts not included in a Purchase Order in the absence of a fully executed amendment of Purchase Order.

2.4 Pricing for items in Appendix A represent the maximum cost for each item offered by the Contractor. Contractor and Participating Entity may mutually agree to a lower cost for any item covered under this agreement.

2.5 NCTCOG Obligations

2.5.1 NCTCOG shall make available a contract page on its TXShare.org website which will include contact information for the Contractor(s).

2.6 Participating Entity Obligations.

2.6.1 In order to utilize the Services, Participating Entities must have executed a Master Interlocal Agreement for TXShare with NCTCOG. This agreement with the Participating Entity will define the legal relationship between NCTCOG and the Participating Entity.

2.6.2 In order to utilize the Services, Participating Entities must execute a Purchase Order with the Contractor. This agreement with the Participating Entity will define the Services and costs that the Participating Entity desires to have implemented by the Contractor.

2.7 Contractor Obligations.

2.7.1 Contractor must be able to deliver, perform, install, and implement services with the requirements and intent of RFP #2024-019

2.7.2 If applicable, Contractor shall provide all necessary material, labor and management required to perform this work. The scope of services shall include, but not be limited to, items listed in Appendix A.

2.7.3 Contractor agrees to market and promote the use of the TXSHARE awarded contract whenever possible among its current and solicited customer base, such as, but not limited to via the Contractor's website. Contractor shall agree to follow reporting requirements and report sales made under this Master Services Agreement in accordance with Section 4.2.

**ARTICLE III
TERM**

3.1 This Agreement will commence on the Effective Date and remain in effect for an initial term ending on April 30, 2026 (the "**Term**"), unless earlier terminated as provided herein. This Agreement will automatically be renewed, unless NCTCOG explicitly desires otherwise, for up to three additional years through April 30, 2029.

3.2 **Termination.** NCTCOG and/or Participating Entities may terminate this Agreement and/or any Purchase Order to which it is a signatory at any time, with or without cause, upon thirty (30) days' prior written notice to Contractor. Upon its receipt of notice of termination of this Agreement or Purchase Order, Contractor shall follow any instructions of NCTCOG respecting work stoppage. Contractor shall cooperate with NCTCOG and/or Participating Entities to provide for an orderly conclusion of the Services. Contractor shall use its best efforts to minimize the amount of any non-cancelable obligations and shall assign any contracts related thereto to NCTCOG or Participating Entity at its request. If NCTCOG or Participating Entity elects to continue any activities underlying a terminated Purchase Order after termination, Contractor shall cooperate with NCTCOG or Participating Entity to provide for an orderly transfer of Contractor's responsibilities with respect to such Purchase Order to NCTCOG or Participating Entity. Upon the effective date of any such termination, the Contractor shall submit a final invoice for payment in accordance with Article IV, and NCTCOG or Participating Entity shall pay such amounts as are due to Contractor through the effective date of termination. NCTCOG or Participating Entity shall only be liable for payment of

services rendered before the effective date of termination. If Agreement is terminated, certain reporting requirements identified in this Agreement shall survive termination of this Agreement.

- 3.2.1 **Termination for Cause:** Either party may immediately terminate this Agreement if the other party breaches its obligations specified within this Agreement, and, where capable of remedy, such breach has not been materially cured within thirty (30) days of the breaching party's receipt of written notice describing the breach in reasonable detail.
- 3.2.2 **Breach:** Upon any material breach of this Agreement by either party, the non-breaching party may terminate this Agreement upon twenty (20) days written notice to the breaching party. The notice shall become effective at the end of the twenty (20) day period unless the breaching party cures such breach within such period.

ARTICLE IV COMPENSATION

- 4.1 **Invoices.** Contractor shall submit an invoice to the ordering Participating Entity in accordance with billing terms as stated in Appendix A for each Scope of Service. If billing terms are not specified for a particular Scope of Service, then the Contractor will submit an invoice to the Participating Entity upon receipt of an executed Purchase Order and after completion of the work, with Net 30 payment terms.

Costs incurred prior to execution of this Agreement are not eligible for reimbursement. There shall be no obligation whatsoever to pay for performance of this Agreement from the monies of the NCTCOG or Participating Entities, other than from the monies designated for this Agreement and/or executed Purchase Order. Contractor expressly agrees that NCTCOG shall not be liable, financial or otherwise, for Services provided to Participating Entities.

- 4.2 **Reporting.** NCTCOG intends to make this Agreement available to other governmental entities through its TXShare cooperative purchasing program. Contractor shall submit to NCTCOG on a calendar quarterly basis a report that identifies any new client Participating Entities, the date and order number, and the total contracted value of services that each Participating Entity has purchased and paid in full under this Master Service Agreement. Reporting and invoices should be submitted to:

NCTCOG
ATTN: TXShare
PO Box 5888
Arlington, TX 76005-5888
Email: TXShare@nctcog.org

ARTICLE V SERVICE FEE

- 5.1 **Explanation.** NCTCOG will make this Master Service Agreement available to other governmental entities, Participating Entities, and non-profit agencies in Texas and the rest of the United States through its TXShare cooperative purchasing program. The Contractor is able to market the Services under this Agreement to any Participating Entity with emphasis that competitive solicitation is not required when the Participating Entity purchases off of a cooperative purchasing program such as TXShare. However, each Participating Entity will make the decision that it feels is in compliance with its own purchasing requirements. The Contractor realizes substantial efficiencies through their ability to offer pricing through the TXShare Cooperative and that will increase the sales opportunities as well as reduce the need to repeatedly respond to Participating Entities' Requests for Proposals.

From these efficiencies, Contractor will pay an administrative fee to TXShare calculated as a percentage of sales processed through the TXShare Master Services Agreement. This administrative fee is not an added cost to TXShare participants. This administrative fee covers the costs of solicitation of the contract, marketing and facilitation, as well as offsets expenses incurred by TXShare.

5.2 Administrative Fee. NCTCOG will utilize an administrative fee, in the form of a percent of cost that will apply to all contracts between awarded contractors and NCTCOG or participants resulting from this solicitation. The administrative fee will be remitted by the Contractor to NCTCOG on a quarterly basis, along with required quarterly reporting. The remuneration fee for this program will be 2% on all fees for service, with the exception of expenses that are passed through to Participating Entities without markup from the Contractor, such as, but not limited to, advertising, travel expenses and per diem costs, temporary housing, and materials production.

5.3 Setup and Implementation. NCTCOG will provide instruction and guidance as needed to the Contractor to assist in maximizing mutual benefits from marketing these Services through the TXShare purchasing program.

**ARTICLE VI
RELATIONSHIP BETWEEN THE PARTIES**

6.1 Contractual Relationship. It is understood and agreed that the relationship described in this Agreement between the Parties is contractual in nature and is not to be construed to create a partnership or joint venture or agency relationship between the parties. Neither party shall have the right to act on behalf of the other except as expressly set forth in this Agreement. Contractor will be solely responsible for and will pay all taxes related to the receipt of payments hereunder and shall give reasonable proof and supporting documents, if reasonably requested, to verify the payment of such taxes. No Contractor personnel shall obtain the status of or otherwise be considered an employee of NCTCOG or Participating Entity by virtue of their activities under this Agreement.

**ARTICLE VII
REPRESENTATION AND WARRANTIES**

7.1 Representations and Warranties. Contractor represents and warrants that:

7.1.1 As of the Effective Date of this Agreement, it is not a party to any oral or written contract or understanding with any third party that is inconsistent with this Agreement and/or would affect the Contractor's performance under this Agreement; or that will in any way limit or conflict with its ability to fulfill the terms of this Agreement. The Contractor further represents that it will not enter into any such agreement during the Term of this Agreement;

7.1.2 NCTCOG is prohibited from making any award or permitting any award at any tier to any party which is debarred or suspended or otherwise excluded from, or ineligible for, participation in federal assistance programs under Executive Order 12549, Debarment and Suspension. Contractor and its subcontractors shall include a statement of compliance with Federal and State Debarment and suspension regulations in all Third-party contracts.

7.1.3 Contractor shall notify NCTCOG if Contractor or any of the Contractor's sub-contractors becomes debarred or suspended during the performance of this Agreement. Debarment or suspension of the Contractor or any of Contractor's sub-contractors may result in immediate termination of this Agreement.

7.1.4 Contractor and its employees and sub-contractors have all necessary qualifications, licenses, permits, and/or registrations to perform the Services in accordance with the terms and conditions of this Agreement, and at all times during the Term, all such qualifications, licenses, permits, and/or registrations shall be current and in good standing.

- 7.1.5 Contractor shall, and shall cause its representatives to, comply with all municipal, state, and federal laws, rules, and regulations applicable to the performance of the Contractor's obligations under this Agreement.

ARTICLE VIII CONFIDENTIAL INFORMATION AND OWNERSHIP

- 8.1 **Confidential Information.** Contractor acknowledges that any information it or its employees, agents, or subcontractors obtain regarding the operation of NCTCOG or Participating Entities, its products, services, policies, customer, personnel, and other aspect of its operation ("Confidential Information") is proprietary and confidential, and shall not be revealed, sold, exchanged, traded, or disclosed to any person, company, or other entity during the period of the Contractor's retention hereunder or at any time thereafter without the express written permission of NCTCOG or Participating Entity.

Notwithstanding anything in this Agreement to the contrary, Contractor shall have no obligation of confidentiality with respect to information that (i) is or becomes part of the public domain through no act or omission of Contractor; (ii) was in Contractor's lawful possession prior to the disclosure and had not been obtained by Contractor either directly or indirectly from the NCTCOG or Participating Entity; (iii) is lawfully disclosed to Contractor by a third party without restriction on disclosure; (iv) is independently developed by Contractor without use of or reference to the NCTCOG's Participating Entity's Confidential Information; or (v) is required to be disclosed by law or judicial, arbitral or governmental order or process, provided Contractor gives the NCTCOG or Participating Entity prompt written notice of such requirement to permit the NCTCOG or Participating Entity to seek a protective order or other appropriate relief. Contractor acknowledges that NCTCOG and Participating Entities must strictly comply with applicable public information laws, in responding to any request for public information. This obligation supersedes any conflicting provisions of this Agreement.

- 8.2 **Ownership.** No title or ownership rights to any applicable software are transferred to the NCTCOG by this agreement. The Contractor and its suppliers retain all right, title and interest, including all copyright and intellectual property rights, in and to, the software (as an independent work and as an underlying work serving as a basis for any improvements, modifications, derivative works, and applications NCTCOG may develop), and all copies thereof. All final documents, data, reports, information, or materials are and shall at all times be and remain, upon payment of Contractor's invoices therefore, the property of NCTCOG or Participating Entity and shall not be subject to any restriction or limitation on their future use by, or on behalf of, NCTCOG or Participating Entity, except otherwise provided herein. Subject to the foregoing exception, if at any time demand be made by NCTCOG or Participating Entity for any documentation related to this Agreement and/or applicable Purchase Orders for the NCTCOG and/or any Participating Entity, whether after termination of this Agreement or otherwise, the same shall be turned over to NCTCOG without delay, and in no event later than thirty (30) days after such demand is made. Contractor shall have the right to retain copies of documentation, and other items for its archives. If for any reason the foregoing Agreement regarding the ownership of documentation is determined to be unenforceable, either in whole or in part, the Contractor hereby assigns and agrees to assign to NCTCOG all rights, title, and interest that the Contractor may have or at any time acquire in said documentation and other materials, provided that the Contractor has been paid the aforesaid.

ARTICLE IX GENERAL PROVISIONS

- 9.1 **Notices.** All notices from one Party to another Party regarding this Agreement shall be in writing and delivered to the addresses shown below:

If to NCTCOG:

North Central Texas Council of Governments
P.O. Box 5888
Arlington, TX 76005-5888
Attn: Charlie Oberrender
(817) 695-9289
coberrender@nctcog.org

If to Contractor:

Strategic Government Resources, Inc.
PO Box 1642
Keller, TX 76244
Attn: Jennifer Fadden
jenniferfadden@governmentresource.com
(817) 337-8581

The above contact information may be modified without requiring an amendment to the Agreement.

9.2 **Tax.** NCTCOG and several participating entities are exempt from Texas limited sales, federal excise and use tax, and does not pay tax on purchase, rental, or lease of tangible personal property for the organization's use. A tax exemption certificate will be issued upon request.

9.3 **Indemnification.** Contractor shall defend, indemnify, and hold harmless NCTCOG and Participating Entities, NCTCOG's affiliates, and any of their respective directors, officers, employees, agents, subcontractors, successors, and assigns from any and all suits, actions, claims, demands, judgments, liabilities, losses, damages, costs, and expenses (including reasonable attorneys' fees and court costs) (collectively, "Losses") arising out of or relating to: (i) Services performed and carried out pursuant to this Agreement; (ii) breach of any obligation, warranty, or representation in this Agreement, (iii) the negligence or willful misconduct of Contractor and/or its employees or subcontractors; or (iv) any infringement, misappropriation, or violation by Contractor and/or its employees or subcontractors of any right of a third party; provided, however, that Contractor shall have no obligation to defend, indemnify, or hold harmless to the extent any Losses are the result of NCTCOG's or Participating Entities' gross negligence or willful misconduct.

9.4 **Limitation of Liability.** In no event shall either party be liable for special, consequential, incidental, indirect or punitive loss, damages or expenses arising out of or relating to this Agreement, whether arising from a breach of contract or warranty, or arising in tort, strict liability, by statute or otherwise, even if it has been advised of their possible existence or if such loss, damages or expenses were reasonably foreseeable.

Notwithstanding any provision hereof to the contrary, neither party's liability shall be limited by this Article with respect to claims arising from breach of any confidentiality obligation, arising from such party's infringement of the other party's intellectual property rights, covered by any express indemnity obligation of such party hereunder, arising from or with respect to injuries to persons or damages to tangible property, or arising out of the gross negligence or willful misconduct of the party or its employees.

9.5 **Insurance.** At all times during the term of this Agreement, Contractor shall procure, pay for, and maintain, with approved insurance carriers, the minimum insurance requirements set forth below, unless otherwise agreed in a Purchase Order between Contractor and Participating Entities. Further, Contractor shall require all contractors and sub-contractors performing work for which the same liabilities may apply under this Agreement to do likewise. All

subcontractors performing work for which the same liabilities may apply under this contract shall be required to do likewise. Contractor may cause the insurance to be effected in whole or in part by the contractors or sub-contractors under their contracts. NCTCOG reserves the right to waive or modify insurance requirements at its sole discretion.

Requirements:

Workers' Compensation:

Statutory limits and employer's liability of \$100,000 for each accident or disease.

Commercial General Liability:

Required Limits:

\$1,000,000 per occurrence;

\$3,000,000 Annual Aggregate

Commercial General Liability policy shall include:

Coverage A: Bodily injury and property damage;

Coverage B: Personal and Advertising Injury liability;

Coverage C: Medical Payments;

Products: Completed Operations;

Fire Legal Liability;

Policy coverage must be on an "occurrence" basis using CGL forms as approved by the Texas State Board of Insurance.

Business Auto Liability: Coverage shall be provided for all owned hired, and non-owned vehicles. Required Limit: \$1,000,000 combined single limit each accident.

Professional Errors and Omissions liability:

Required Limits:

\$1,000,000 Each Claim

\$1,000,000 Annual Aggregate

- 9.5 **Conflict of Interest.** During the term of this Agreement, and all extensions hereto and for a period of one (1) year thereafter, neither party, shall, without the prior written consent of the other, directly or indirectly, whether for its own account or with any other persons or entity whatsoever, employ, solicit to employ or endeavor to entice away any person who is employed by the other party.
- 9.6 **Force Majeure.** It is expressly understood and agreed by both parties to this Agreement that, if the performance of any provision of this Agreement is delayed by force majeure, defined as reason of war, civil commotion, act of God, governmental restriction, regulation or interference, fire, explosion, hurricane, flood, failure of transportation, court injunction, or any circumstances which are reasonably beyond the control of the party obligated or permitted under the terms of this Agreement to do or perform the same, regardless of whether any such circumstance is similar to any of those enumerated herein, the party so obligated or permitted shall be excused from doing or performing the same during such period of delay, so that the period of time applicable to such requirement shall be extended for a period of time equal to the period of time such party was delayed. Each party must inform the other in writing within a reasonable time of the existence of such force majeure.
- 9.7 **Ability to Perform.** Contractor agrees promptly to inform NCTCOG of any event or change in circumstances which may reasonably be expected to negatively affect the Contractor's ability to perform its obligations under this Agreement in the manner contemplated by the parties.

- 9.8 **Availability of Funding.** This Agreement and all claims, suits, or obligations arising under or related to this Agreement are subject to and limited by the receipt and availability of funds which are received from the Participating Entities by NCTCOG dedicated for the purposes of this Agreement.
- 9.9 **Governing Law.** This Agreement will be governed by and construed in accordance with the laws of the State of Texas, United States of America. The mandatory and exclusive venue for the adjudication or resolution of any dispute arising out of this Agreement shall be in Tarrant County, Texas.
- 9.10 **Waiver.** Failure by either party to insist on strict adherence to any one or more of the terms or conditions of this Agreement, or on one or more occasions, will not be construed as a waiver, nor deprive that party of the right to require strict compliance with the same thereafter.
- 9.11 **Entire Agreement.** This Agreement and any attachments/addendums, as provided herein, constitutes the entire agreement of the parties and supersedes all other agreements, discussions, representations or understandings between the parties with respect to the subject matter hereof. No amendments hereto, or waivers or releases of obligations hereunder, shall be effective unless agreed to in writing by the parties hereto.
- 9.12 **Assignment.** This Agreement may not be assigned by either Party without the prior written consent of the other Party.
- 9.13 **Severability.** In the event any one or more of the provisions contained in this Agreement shall for any reason be held to be invalid, illegal, or unenforceable in any respect, such invalidity, illegality, or unenforceability shall not affect any other provision(s) hereof, and this Agreement shall be revised so as to cure such invalid, illegal, or unenforceable provision(s) to carry out as near as possible the original intents of the Parties.
- 9.14 **Amendments.** This Agreement may be amended only by a written amendment executed by both Parties, except that any alterations, additions, or deletions to the terms of this Agreement, which are required by changes in Federal and State law or regulations or required by the funding source, are automatically incorporated into this Agreement without written amendment hereto and shall become effective on the date designated by such law or regulation.
- 9.15 **Dispute Resolution.** The parties to this Agreement agree to the extent possible and not in contravention of any applicable State or Federal law or procedure established for dispute resolution, to attempt to resolve any dispute between them regarding this Agreement informally through voluntary mediation, arbitration or any other local dispute mediation process, including but not limited to dispute resolution policies of NCTCOG, before resorting to litigation.
- 9.16 **Publicity.** Contractor shall not issue any press release or make any statement to the media with respect to this Agreement or the services provided hereunder without the prior written consent of NCTCOG.
- 9.17 **Survival.** Rights and obligations under this Agreement which by their nature should survive will remain in effect after termination or expiration hereof.

**ARTICLE X
ADDITIONAL REQUIREMENTS**

- 10.1 **Equal Employment Opportunity.** Contractor shall not discriminate against any employee or applicant for employment because of race, religion, color, sex, sexual orientation, gender identity, or national origin. Contractor shall take affirmative actions to ensure that applicants are employed, and that employees are treated, during their employment, without regard to their race, religion, color, sex, sexual orientation, gender identity, or national origin. Such actions shall include, but not be limited to, the following: employment, upgrading, demotion, or transfer; recruitment or recruitment advertising; layoff or termination; rates of pay or other forms of compensation; and selection for training, including apprenticeship.

- 10.2 **Davis-Bacon Act.** Contractor agrees to comply with all applicable provisions of 40 USC § 3141 – 3148.
- 10.3 **Contract Work Hours and Selection Standards.** Contractor agrees to comply with all applicable provisions of 40 USC § 3701 – 3708 to the extent this Agreement indicates any employment of mechanics or laborers.
- 10.4 **Rights to Invention Made Under Contract or Agreement.** Contractor agrees to comply with all applicable provisions of 37 CFR Part 401.
- 10.5 **Clean Air Act, Federal Water Pollution Control Act, and Energy Policy Conservation Act.** Contractor agrees to comply with all applicable provisions of the Clean Air Act under 42 USC § 7401 – 7671, the Energy Federal Water Pollution Control Act 33 USC § 1251 – 1387, and the Energy Policy Conservation Act under 42 USC § 6201.
- 10.6 **Debarment/Suspension.** Contractor is prohibited from making any award or permitting any award at any tier to any party which is debarred or suspended or otherwise excluded from or ineligible for participation in federal assistance programs under Executive Order 12549, Debarment and Suspension. Contractor and its subcontractors shall comply with the Certification Requirements for Recipients of Grants and Cooperative Agreements Regarding Debarments and Suspensions.
- 10.7 **Restrictions on Lobbying.** Byrd Anti-Lobbying Amendment (31 U.S.C. 1352)—Contractors that apply or bid for an award exceeding \$100,000 must file the required certification. Each tier certifies to the tier above that it will not and has not used Federal appropriated funds to pay any person or organization for influencing or attempting to influence an officer or employee of any agency, a member of Congress, officer or employee of Congress, or an employee of a member of Congress in connection with obtaining any Federal contract, grant or any other award covered by 31 U.S.C. 1352. Each tier must also disclose any lobbying with non-Federal funds that takes place in connection with obtaining any Federal award. Such disclosures are forwarded from tier to tier up to the non-Federal award.
- 10.8 **Procurement of Recovered Materials.** Contractor agrees to comply with all applicable provisions of 2 CFR §200.322.
- 10.9 **Drug-Free Workplace.** Contractor shall provide a drug free workplace in compliance with the Drug Free Work Place Act of 1988.
- 10.10 **Texas Corporate Franchise Tax Certification.** Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments.
- 10.11 **Civil Rights Compliance**
- Compliance with Regulations: Contractor will comply with the Acts and the Regulations relative to Nondiscrimination in Federally assisted programs of the U.S. Department of Transportation (USDOT), the Federal Highway Administration (FHWA), as they may be amended from time to time, which are herein incorporated by reference and made part of this agreement.
- Nondiscrimination: Contractor, with regard to the work performed by it during the contract, will not discriminate on the grounds of race, color, sex, or national origin in the selection and retention of subcontractors, including procurement of materials and leases of equipment. Contractor will not participate directly or indirectly in the discrimination prohibited by the Acts and the Regulations, including employment practices when the contract covers any activity, project, or program set forth in Appendix B of 45 CFR Part 21.
- Solicitations for Subcontracts, Including Procurement of Materials and Equipment: In all solicitations either by competitive bidding or negotiation made by Contractor for work to be performed under a subcontract, including

procurement of materials or leases of equipment, each potential subcontractor or supplier will be notified by Contractor of obligations under this contract and the Acts and Regulations relative to Nondiscrimination on the grounds of race, color, sex, or national origin.

Information and Reports: Contractor will provide all information and reports required by the Acts, the Regulations, and directives issued pursuant thereto, and will permit access to its books, records, accounts, other sources of information, and facilities as may be determined by the State or the FHWA to be pertinent to ascertain compliance with such Acts, Regulations or directives. Where any information required of Contractor is in the exclusive possession of another who fails or refuses to furnish this information, Contractor will so certify to NCTCOG, the Texas Department of Transportation (“the State”) or the Federal Highway Administration, as appropriate, and will set forth what efforts it has made to obtain the information.

Sanctions for Noncompliance: In the event of Contractor’s noncompliance with the Nondiscrimination provisions of this Agreement, NCTCOG will impose such sanctions as it or the State or the FHWA may determine to be appropriate, including, but not limited to: withholding of payments to the Contractor under this Agreement until the Contractor compiles and/or cancelling, terminating or suspension of this Agreement, in whole or in part.

Incorporation of Provisions: Contractor will include the provisions of the paragraphs listed above, in this section 10.11, in every subcontract, including procurement of materials and leases of equipment, unless exempt by the Acts, the Regulations and directives issued pursuant thereto. Contractor will take such action with respect to any subcontract or procurement as NCTCOG, the State, or the FHWA may direct as a means of enforcing such provisions including sanctions for noncompliance. Provided, that if Contractor becomes involved in, or is threatened with, litigation with a subcontractor or supplier because of such direction, Contractor may request the State to enter into such litigation to protect the interests of the State. In addition, Contractor may request the United States to enter into such litigation to protect the interests of the United States.

10.12 **Disadvantaged Business Enterprise Program Requirements**

Contractor shall not discriminate on the basis of race, color, national origin, or sex in the award and performance of any U.S. Department of Transportation (DOT)-assisted contract or in the administration of its DBE program or the requirements of 49 CFR Part 26. Contractor shall take all necessary and reasonable steps under 49 CFR Part 26 to ensure non-discrimination in award and administration of DOT-assisted contracts. Each sub-award or subcontract must include the following assurance: *The Contractor, sub-recipient, or sub-contractor shall not discriminate on the basis of race, color, national origin, or sex in the performance of this Agreement. The Contractor shall carry out applicable requirements of 49 CFR Part 26 in the award and administration of DOT-assisted contracts. Failure by the Contractor to carry out these requirements is a material breach of this agreement, which may result in the termination of this agreement or such other remedy as the recipient deems appropriate.*

10.13 **Pertinent Non-Discrimination Authorities**

During the performance of this Agreement, Contractor, for itself, its assignees, and successors in interest agree to comply with the following nondiscrimination statutes and authorities; including but not limited to:

- a. Title VI of the Civil Rights Act of 1964 (42 U.S.C. § 2000d et seq., 78 stat. 252), (prohibits discrimination on the basis of race, color, national origin); and 49 CFR Part 21.
- b. The Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970, (42 U.S.C. § 4601), (prohibits unfair treatment of persons displaced or whose property has been acquired because of Federal or Federal-aid programs and projects).
- c. Federal-Aid Highway Act of 1973, (23 U.S.C. § 324 et seq.), as amended, (prohibits discrimination on the basis of sex).
- d. Section 504 of the Rehabilitation Act of 1973, (29 U.S.C. § 794 et seq.) as amended, (prohibits discrimination on the basis of disability); and 49 CFR Part 27.
- e. The Age Discrimination Act of 1975, as amended, (49 U.S.C. § 6101 et seq.), (prohibits discrimination on the basis of age).

- f. Airport and Airway Improvement Act of 1982, (49 U.S.C. Chapter 471, Section 47123), as amended, (prohibits discrimination based on race, creed, color, national origin, or sex).
- g. The Civil Rights Restoration Act of 1987, (PL 100-209), (Broadened the scope, coverage and applicability of Title VI of the Civil Rights Act of 1964, The Age Discrimination Act of 1975 and Section 504 of the Rehabilitation Act of 1973, by expanding the definition of the terms “programs or activities” to include all of the programs or activities of the Federal-aid recipients, subrecipients and contractors, whether such programs or activities are Federally funded or not).
- h. Titles II and III of the Americans with Disabilities Act, which prohibits discrimination on the basis of disability in the operation of public entities, public and private transportation systems, places of public accommodation, and certain testing entities (42 U.S.C. §§ 12131-12189) as implemented by Department of Transportation regulations at 49 C.F.R. parts 37 and 38.
- i. The Federal Aviation Administration’s Nondiscrimination statute (49 U.S.C. § 47123) (prohibits discrimination on the basis of race, color, national origin, and sex).
- j. Executive Order 12898, Federal Actions to Address Environmental Justice in Minority Populations and Low-Income Populations, which ensures nondiscrimination against minority populations by discouraging programs, policies, and activities with disproportionately high and adverse human health or environmental effects on minority and low-income populations.
- k. Executive Order 13166, Improving Access to Services for Persons with Limited English Proficiency, and resulting agency guidance, national origin discrimination includes discrimination because of limited English proficiency (LEP). To ensure compliance with Title VI, the parties must take reasonable steps to ensure that LEP persons have meaningful access to the programs (70 Fed. Reg. at 74087 to 74100).
- i. Title IX of the Education Amendments of 1972, as amended, which prohibits the parties from discriminating because of sex in education programs or activities (20 U.S.C. 1681 et seq.).

10.14 Ineligibility to Receive State Grants or Loans, or Receive Payment on State Contracts

In accordance with Section 231.006 of the Texas Family Code, a child support obligor who is more than thirty (30) days delinquent in paying child support and a business entity in which the obligor is a sole proprietor, partner, shareholder, or owner with an ownership interest of at least twenty-five (25) percent is not eligible to:

- a. Receive payments from state funds under a contract to provide property, materials or services; or
- b. Receive a state-funded grant or loan.

By signing this Agreement, the Contractor certifies compliance with this provision.

10.15 House Bill 89 Certification

If contractor is required to make a certification pursuant to Section 2270.002 of the Texas Government Code, contractor certifies that contractor does not boycott Israel and will not boycott Israel during the term of the contract resulting from this solicitation. If contractor does not make that certification, contractor state in the space below why the certification is not required.

10.16 Certification Regarding Disclosure of Conflict of Interest.

The undersigned certifies that, to the best of his or her knowledge or belief, that:

“No employee of the contractor, no member of the contractor’s governing board or body, and no person who exercises any functions or responsibilities in the review or approval of the undertaking or carrying out of this contract shall participate in any decision relating to this contract which affects his/her personal pecuniary interest.

Executives and employees of contractor shall be particularly aware of the varying degrees of influence that can be exerted by personal friends and associates and, in administering the contract, shall exercise due diligence to avoid situations which give rise to an assertion that favorable treatment is being granted to friends and associates. When it is in the public interest for the contractor to conduct business with a friend or associate of an executive or employee of the contractor, an elected official in the area or a member of the North Central Texas Council of Governments, a permanent record of the transaction shall be retained.

Any executive or employee of the contractor, an elected official in the area or a member of the NCTCOG, shall not solicit or accept money or any other consideration from a third person, for the performance of an act reimbursed in whole or part by contractor or Department. Supplies, tools, materials, equipment or services purchased with contract funds shall be used solely for purposes allowed under this contract. No member of the NCTCOG shall cast a vote on the provision of services by that member (or any organization which that member represents) or vote on any matter which would provide a direct or indirect financial benefit to the member or any business or organization which the member directly represents”.

No officer, employee or paid consultant of the contractor is a member of the NCTCOG.

No officer, manager or paid consultant of the contractor is married to a member of the NCTCOG.
No member of NCTCOG directly owns, controls or has interest in the contractor.

The contractor has disclosed any interest, fact, or circumstance that does or may present a potential conflict of interest.

No member of the NCTCOG receives compensation from the contractor for lobbying activities as defined in Chapter 305 of the Texas Government Code. Should the contractor fail to abide by the foregoing covenants and affirmations regarding conflict of interest, the contractor shall not be entitled to the recovery of any costs or expenses incurred in relation to the contract and shall immediately refund to the North Central Texas Council of Governments any fees or expenses that may have been paid under this contract and shall further be liable for any other costs incurred or damages sustained by the NCTCOG as it relates to this contract.

10.17 Certification of Fair Business Practices

That the submitter affirms that the submitter has not been found guilty of unfair business practices in a judicial or state agency administrative proceeding during the preceding year. The submitter further affirms that no officer of the submitter has served as an officer of any company found guilty of unfair business practices in a judicial or state agency administrative during the preceding year.

10.18 Certification of Good Standing Texas Corporate Franchise Tax Certification

Pursuant to Article 2.45, Texas Business Corporation Act, state agencies may not contract with for profit corporations that are delinquent in making state franchise tax payments. The undersigned authorized representative of the corporation making the offer herein certified that the following indicated Proposal is true and correct and that the undersigned understands that making a false Proposal is a material breach of contract and is grounds for contract cancellation.

10.19 Prohibition on Certain Telecommunications and Video Surveillance Services or Equipment.

Pursuant to Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, NCTCOG is prohibited from using federal funds to procure, contract with entities who use, or extend contracts with entities who use certain telecommunications and video surveillance equipment or services provided by certain Chinese controlled entities. The Contractor agrees that it is not providing NCTCOG with or using telecommunications and video surveillance equipment and services as prohibited by 2 CFR §200.216 and §200.471. Contractor shall certify its compliance through execution of the “Prohibited Telecommunications and Video Surveillance Services or Equipment Certification,” which is included as Appendix D of this Contract. The Contractor shall pass these

requirements down to any of its subcontractors funded under this Agreement. The Contractor shall notify NCTCOG if the Contractor cannot comply with the prohibition during the performance of this Contract.

10.20 Discrimination Against Firearms Entities or Firearms Trade Associations

Pursuant to Texas Local Government Code Chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries. NCTCOG is prohibited from contracting with entities, or extend contracts with entities who have practice, guidance, or directive that discriminates against a firearm entity or firearm trade association. Contractor shall certify its compliance through execution of the “Discrimination Against Firearms Entities or Firearms Trade Associations Certification,” which is included as Appendix D of this Contract. The Contractor shall pass these requirements down to any of its subcontractors funded under this Agreement. The Contractor shall notify NCTCOG if the Contractor cannot comply with the prohibition during the performance of this Contract.

10.21 Boycotting of Certain Energy Companies

Pursuant to Texas Local Government Code Chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who boycott certain energy companies. NCTCOG is prohibited from contracting with entities or extend contracts with entities that boycott energy companies. Contractor shall certify its compliance through execution of the “Boycotting of Certain Energy Companies Certification,” which is included as Appendix D of this Contract. The Contractor shall pass these requirements down to any of its subcontractors funded under this Agreement. The Contractor shall notify NCTCOG if the Contractor cannot comply with the prohibition during the performance of this Contract.

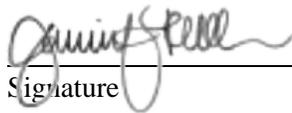
10.22 Domestic Preference

As appropriate and to the extent consistent with law, the Contractor should, to the greatest extent practicable, provide a preference for the purchase, acquisition, or use of goods, products, or materials produced in the United States (including but not limited to iron, aluminum, steel, cement, and other manufactured products). Consistent with §200.322, the following items shall be defined as: “Produced in the United States” means, for iron and steel products, that all manufacturing processes, from the initial melting stage through the application of coatings, occurred in the United States. “Manufactured products” means items and construction materials composed in whole or in part of non-ferrous metals such as aluminum; plastics and polymer-based products such as polyvinyl chloride pipe; aggregates such as concrete; glass, including optical fiber; and lumber.

IN WITNESS WHEREOF, the parties have executed this Agreement as of the Effective Date.

Strategic Government Resources, Inc.

North Central Texas Council of Governments



4/24/24

Signature

Date

DocuSigned by:

A4E72C1BEF0F426...

4/26/2024

Signature

Date

R. Michael Eastland
Executive Director

Jennifer Fadden

Printed Name

Chief Operating Officer

Title

APPENDIX A
Statement of Work

Scope of Services

Service Category #1: Executive Search & Recruitment Services Full Service Executive Recruitment

Approach and Methodology

A full-service recruitment typically entails the following steps:

- 1. Organization/Position Insight and Analysis**
 - Project Kickoff Meeting and Develop Anticipated Timeline
 - Stakeholder Interviews and Listening Sessions
 - Develop Recruitment Brochure
- 2. Recruitment Campaign and Outreach to Prospective Applicants**
 - Advertising and Marketing
 - Communication with Prospective Applicants
 - Communication with Active Applicants
- 3. Initial Screening and Review by Executive Recruiter**
- 4. Search Committee Briefing to Review Applicant Pool and Select Semifinalists**
- 5. Evaluation of Semifinalists**
 - Written Questionnaires
 - Recorded One-Way Semifinalist Interviews
 - Media Searches - Stage 1, as described below
- 6. Search Committee Briefing to Select Finalists**
- 7. Evaluation of Finalists**
 - Comprehensive Media Searches - Stage 2, as described below
 - Background Investigation Reports
 - DiSC Management Assessments (if desired, supplemental cost)
 - First Year Plan or Other Advanced Exercise
 - Press Release Announcing Finalists (if requested)
- 8. Interview Process**
 - Face-to-Face Interviews
 - Stakeholder Engagement (if desired)
 - Deliberations
 - Reference Checks (may occur earlier in process)
- 9. Negotiations and Hiring Process**
 - Determine Terms of an Employment Offer
 - Negotiate Terms and Conditions of Employment
 - Press Release Announcing New Hire (if requested)

Step 1: Organization/Position Insight and Analysis

Project Kickoff Meeting and Develop Anticipated Timeline

SGR will meet with the organization at the outset of the project to discuss the recruitment strategy and timeline. At this time, SGR will also request that the organization provide us with photos and information on the community, organization, and position to assist us in drafting the recruitment brochure.

Stakeholder Interviews and Listening Sessions

Stakeholder interviews and listening sessions are integral to SGR's approach. SGR devotes tremendous energy to understanding your organization's unique culture, environment, and goals to ensure you get the right match for your specific needs. Obtaining a deep understanding your organizational needs is the crucial foundation for a successful executive recruitment. In collaboration with the organization, SGR will compile a list of internal and external stakeholders to meet with regarding the position. These interviews and listening sessions will identify potential issues that may affect the dynamics of the recruitment and contribute to a comprehensive understanding of the position, special considerations, and the political environment. This process fosters organizational buy-in and will assist us in creating the position profile.

Develop Recruitment Brochure

After the stakeholder meetings, SGR will develop a recruitment brochure, which will be reviewed and revised in partnership with your organization until we are in agreement that it accurately represents the sought-after leadership and management attributes.

To view sample recruitment brochures, please visit:

<https://sgr.pub/OpenRecruitments>

Step 2: Recruitment Campaign and Outreach to Prospective Applicants

Advertising and Marketing

The Executive Recruiter and the client work together to determine the best ways to advertise and recruit for the position. SGR's Servant Leadership e-newsletter, with a reach of over 40,000 subscribers in all 50 states, will announce your position. Additionally, we will send targeted emails to opt-in subscribers of SGR's Job Alerts, and your position will be posted on SGR's website and Job Board. SGR provides a comprehensive social media marketing campaign that includes custom-made graphics and distribution on SGR's LinkedIn page. Furthermore, we will provide a recommended list of ad placements to be approved by the client, targeting the most effective venues for reaching qualified candidates for that particular position.

Communication with Prospective Applicants

SGR maintains regular communication with interested prospects throughout the recruitment process. Outstanding candidates often conduct thorough research on the available position before submitting their resumes.

As a result, we receive a significant number of inquiries, and it is crucial for the executive search firm to be well-prepared to respond promptly, accurately, and comprehensively, while also offering a warm and personalized approach. This initial interaction is where prospective candidates form their first impression of the organization, and it is an area in which SGR excels.

Communication with Active Applicants

Handling the flow of resumes is an ongoing and significant process. On the front end, it involves tracking resumes and promptly acknowledging their receipt. It also involves timely and personalized responses to any questions or inquiries. SGR maintains frequent communication with applicants to ensure they remain enthusiastic and well-informed about the opportunity. Additionally, SGR communicates with active applicants, keeping them informed about the organization and community.

Step 3: Initial Screening and Review by Executive Recruiter

SGR uses a triage process to identify high-probability, medium-probability, and low-probability candidates. This triage ranking is focused on overall assessment based on interaction with the applicant, qualifications, any known issues concerning previous work experience, and evaluation of cultural fit with the organization.

In contrast with the triage process mentioned above, which focuses on subjective assessment of the resumes and how the candidates present themselves, we also evaluate each candidate to ensure that the minimum requirements of the position are met and determine which preferred requirements are satisfied. This sifting process examines how well candidates' applications align with the recruitment criteria outlined in the position profile.

Step 4: Search Committee Briefing to Review Applicant Pool and Select Semifinalists

At this briefing, SGR will conduct a comprehensive presentation to the Search Committee and facilitate the selection of semifinalists. The presentation will include summary information on the process to date, outreach efforts, the candidate pool demographics, and any identified trends or issues. Additionally, a briefing on each candidate and their credentials will be provided.

Step 5: Evaluation of Semifinalists

The review of resumes is a crucial step in the executive recruitment process. However, resumes may not fully reveal an individual's personal qualities and their ability to collaborate effectively with others. In some instances, resumes might also tend to exaggerate or inflate accomplishments and experience.

At SGR, we understand the significance of going beyond the surface level of a resume to ensure that candidates who progress in the recruitment process are truly qualified for the position and a suitable match for the organization. Our focus is to delve deeper and gain a comprehensive

understanding of the person behind the resume, identifying the qualities that make them an outstanding prospect for your organization.

During the evaluation of semifinalist candidates, we take the initiative to follow up when necessary, seeking clarifications or additional information as needed. This approach ensures that we present you with the most qualified and suitable candidates for your unique requirements. At SGR, our ultimate goal is to match your organization with individuals who possess not only the necessary qualifications but also the qualities that align with your organizational culture and values.

Written Questionnaires

As part of our thorough evaluation process, SGR will request semifinalist candidates to complete a comprehensive written exercise. This exercise is designed to gain deeper insight into the candidates' thought processes and communication styles. Our written instrument is customized based on the priorities identified by the Search Committee. The completed written instrument, along with cover letters and resumes submitted by the candidates, will be included in the semifinalist briefing book.

Recorded One-Way Semifinalist Interviews

Recorded one-way interviews will be conducted for semifinalist candidates. This approach provides an efficient and cost-effective way to gain additional insights to aid in selecting finalists to invite for an onsite interview. The interviews allow the Search Committee to evaluate technological competence, demeanor, verbal communication skills, and on-camera presence. Additionally, virtual interviews provide an opportunity for the Search Committee to ask candidates questions on specific topics of special interest.

Media Searches - Stage 1

"Stage 1" of our media search process involves the use of the web-based interface Nexis Diligence™. This platform is an aggregated subscription-based platform that allows access to global news, business, legal, and regulatory content. These media reports at the semifinalist stage have proven helpful by uncovering issues that may not have been previously disclosed by prospective candidates. The recruiter will communicate any "red flags" or noteworthy media coverage to the Search Committee as part of the review of semifinalists with the Search Committee.

Step 6: Search Committee Briefing to Select Finalists

Prior to this briefing, SGR will provide the Search Committee with a briefing book on the semifinalist candidates via an electronic link. The briefing book includes cover letters, resumes, and completed questionnaires.

If applicable, a separate email with the link to view the recorded online interviews is sent to the Search Committee. The objective of this meeting is to narrow the list to finalists who will be invited to participate in onsite interviews.

Step 7: Evaluation of Finalists

Comprehensive Media Searches - Stage 2

“Stage 2” of our media search process includes the web-based interface Nexis Diligence™, supplemented by Google as an additional tool. By combining both resources, we offer an enhanced due diligence process to our clients, enabling efficient and thorough vetting of candidates and minimizing the risk of overlooking critical information. The Stage 2 media search consists of a more complex search, encompassing social media platforms, and has proven to be instrumental in identifying potential adverse news about the candidate that may not have been disclosed previously. The media search provides the Search Committee with an overview of the candidate’s press coverage throughout their career. View a sample media report at: <https://sgr.pub/SGRMediaReport>.

Background Investigation Reports

Through SGR’s partnership with a licensed private investigation firm, we are able to provide our clients with comprehensive background screening reports that include the detailed information listed below. View a sample background report at: <https://sgr.pub/SGRBackgroundReport>.

- Social security number trace
- Address history
- Driving record (MVR)
- Federal criminal search
- National criminal search
- Global homeland security search
- Sex offender registry search
- State criminal court search for states where candidate has lived in previous 10 years
- County wants and warrants for counties where candidate has lived or worked in previous 10 years
- County civil and criminal search for counties where candidate has lived or worked in previous 10 years
- Education verification
- Employment verification for previous 10 years (if requested)
- Military verification (if requested)
- Credit report (if requested)

DiSC Management Assessments (if desired, supplemental cost)

SGR utilizes the DiSC Management assessment tool, which is among the most validated and reliable personal assessment tools available. The DiSC Management assessment provides a comprehensive analysis and report on the candidate’s preferences in five crucial areas: management style, directing and delegating, motivation, development of others, and working with their own manager. View a sample report at: <https://sgr.pub/SGRDiSCReport>.

For assessments of more than two candidates, a DiSC Management Comparison Report is included, offering a side-by-side view of each candidate's preferred management style. View a sample comparison report at: <https://sgr.pub/SGRDiSCCompare>.

First-Year Plan or Other Advanced Exercise

SGR will collaborate with your organization, if desired, to create an advanced exercise for the finalist candidates. One such example is a First-Year Plan, where finalist candidates are encouraged to develop a first-year plan based on their current understanding of the position’s opportunities and challenges. Other exercises, such as a brief presentation on a topic to be identified by the Recruiter and Search Committee, are also typically part of the onsite interview

process to assess finalists' communication and presentation skills, as well as critical analysis abilities.

Step 8: Interview Process

Face-to-Face Interviews

SGR will arrange interviews at a date and time convenient for your organization. This process can be as straightforward or as elaborate as your organization desires. SGR will aid in determining the specifics and assist in developing the interview schedule and timeline. We will provide sample interview questions and participate throughout the process to ensure it runs smoothly and efficiently.

Stakeholder Engagement

At the discretion of the Search Committee, we will closely collaborate with your organization to involve community stakeholders in the interview process. Our recommendation is to design a specific stakeholder engagement process after gaining deeper insights into the organization and the community. As different communities require distinct approaches, we will work together to develop a tailored approach that addresses the unique needs of the organization.

Deliberations

SGR will facilitate a discussion about the finalist interviews and support the Search Committee in making a hiring decision or determining whether to invite one or more candidates for a second interview.

Reference Checks

SGR uses a progressive and adaptive automated reference check system to provide insights on candidates' soft skills from a well-rounded group of references. References may include elected officials, direct supervisors, direct reports, internal organizational peers, professional peers in other organizations, and civic leaders. SGR's reference check platform is anonymous, proven to encourage more candid and truthful responses, thus providing organizations with more meaningful and insightful information on candidates. SGR delivers a written summary report to the organization once all reference checks are completed. The timing of reference checks may vary depending on the specific search process and situation. If finalists' names are made public prior to interviews, SGR will typically contact references before the interview process. If the finalists' names are not made public prior to interviews, SGR may wait until the organization has selected its top candidate before contacting references to protect candidate confidentiality.

Step 9: Negotiations and Hiring Process

Determine Terms of an Employment Offer

Upon request, SGR will provide draft employment agreement language and other helpful information to aid in determining an appropriate offer to extend to your preferred candidate.

Negotiate Terms and Conditions of Employment

SGR will assist to whatever degree you deem appropriate in conducting negotiations with the chosen candidate. SGR will identify and address any special needs or concerns of the selected candidate, including potential complicating factors. With our experience and preparedness, SGR is equipped to facilitate win-win solutions to resolve negotiation challenges.

Press Release (if requested)

Until employment negotiations are finalized, you should exercise caution to avoid the embarrassment of a premature announcement that may not materialize. It is also considered best practice to notify all senior staff and unsuccessful candidates before any media exposure. SGR will assist in coordinating this process and in crafting any necessary announcements or press releases.

Satisfaction Surveys

SGR is committed to following the golden rule, which means providing prompt, professional and excellent communication while always treating every client with honor, dignity and respect. We request clients and candidates to participate in a brief and confidential survey after the completion of the recruitment process. This valuable feedback assists us in our ongoing efforts to improve our processes and adapt to the changing needs of the workforce.

Post-Hire Services

We offer post-hire services, such as executive coaching, team-building retreats, and performance review assistance at the six-month or one-year mark. For more information or to request a customized proposal, please visit <https://www.governmentresource.com/leadership-development-training-resources>.

Typical Timeline *

The timeline below is an example only, and we will work with you to finalize and approve a timeline, with adjustments made if needed after the position is posted.

Initial Steps Prior to Posting Position:	
<ul style="list-style-type: none"> • Contract Execution • Kickoff Meeting to Discuss Recruitment Strategy and Timeline • Organization/Position Insight and Analysis • Stakeholder Interviews and Listening Sessions • Deliverable: Draft Recruitment Brochure • Deliverable: Recommended Ad Placements • Organization Approves Ad Placements • Search Committee Reviews and Approves Brochure 	<p><i>Timing varies and usually takes a minimum of 2-3 weeks.</i></p>

Task	Week
<ul style="list-style-type: none"> • Post Position and Firm up Timeline • Recruitment Campaign and Outreach to Prospective Applicants • Initial Screening and Review by Executive Recruiter 	Weeks 1-4
<ul style="list-style-type: none"> • Search Committee Briefing to Review Applicant Pool and Select Semifinalists 	Week 5
<ul style="list-style-type: none"> • Questionnaires • Recorded One-Way Semifinalist Interviews • Media Searches - Stage 1, as described in Approach/Methodology 	Week 6
<ul style="list-style-type: none"> • Deliverable: Semifinalist Briefing Books via Electronic Link • Deliverable: Recorded Online Interviews, if applicable 	Week 7
<ul style="list-style-type: none"> • Search Committee Briefing to Select Finalists 	Week 8
<ul style="list-style-type: none"> • Comprehensive Media Searches - Stage 2, as described in Approach/Methodology • Background Investigation Reports • Disc Management Assessments (if desired, supplemental cost) • First-Year Plan or Other Advanced Exercise (if desired) 	Weeks 9-10
<ul style="list-style-type: none"> • Deliverable: Finalist Briefing Books via Electronic Link 	Week 11
<ul style="list-style-type: none"> • Face-to-Face Interviews • Stakeholder Engagement (if desired) • Deliberations • Reference Checks (may occur earlier in process) • Negotiations and Hiring Process 	Week 12

** Timeline is dependent upon Search Committee availability and Holidays. Organization agrees to timely provide photos/graphics and information necessary to develop recruitment brochure, narrow candidate field, and conduct candidate screening; failure to do so, may in SGR's reasonable discretion, extend timeline and can negatively impact the outcome of the process.*

Project Personnel

The recruiter for your search will be selected based on their specialized experience and expertise. To view the bios for all SGR Recruiters, please visit the Recruiter section on the SGR website at: [Meet the Team](#)

Terms and Conditions

- The organization agrees not to discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- The organization agrees to refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- The organization agrees to provide SGR with any candidates that were previously accepted as applicants for the given position before engaging SGR to conduct the recruitment for the subject position.
- If the organization wishes to place ads in local, regional, or national newspapers, the organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.

Placement Guarantee

SGR is committed to your satisfaction with the results of our full service recruitment process. If, for any reason, you are not satisfied, we will repeat the entire process one additional time, and you will be charged only for expenses as described in the Fee Proposal under Supplemental Services. Additionally, we promise not to directly solicit any candidate selected under this engagement for another position while they are employed with your organization.

In the event that you select a candidate fully vetted by SGR, who subsequently resigns or is released for any reason within 12 months of their hire date, we are committed to conducting a one-time additional executive search to identify a replacement. In this case, you will only be charged for related expenses as described in the Fee Proposal.

If your organization circumvents SGR's recruitment process and selects a candidate who did not participate in the full recruitment process, the placement guarantee will be null and void. Additionally, SGR does not provide a guarantee for candidates placed as a result of a partial recruitment effort or limited scope recruitment.

Fee Proposal

The Fixed Fee includes:

- Stakeholder Interviews and Listening Sessions
- Production of a Professional Recruitment Brochure
- Recruitment Campaign and Outreach:
 - Outreach to Prospective Applicants
 - Custom Graphics for Email and Social Media Marketing
 - Announcement in SGR's Servant Leadership e-Newsletter
 - Post on SGR's Website
 - Ad on SGR's Job Board
 - Two (2) Targeted Job Blasts to SGR's Opt-In Subscriber Database
 - Promotion on SGR's LinkedIn
- Application Management, Screening, and Evaluation
- Semifinalist Evaluation:
 - Questionnaires for up to 15 Semifinalists
 - Recorded One-Way Interviews for up to 15 Semifinalists
 - Media Searches – Stage 1 Reports for up to 15 Semifinalists
- Semifinalist Briefing Books via Electronic Link
- Comprehensive Stage 2 Media Reports for up to Five (5) Finalists
- Background Investigation Reports for up to Five (5) Finalists
- Finalist Briefing Books via Electronic Link
- Reference Checks for up to Five (5) Finalists
- Two (2) Onsite Visits by the Recruiter for 1-3 days each, Exclusive of Travel Costs

Reimbursable Expenses not included in the fixed price:

- Travel Expenses: Meals are billed back at a per diem rate per meal. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.
- Ad placements will be billed back at actual cost with no markup for overhead.

Supplemental Services/Other Expenses not included in the fixed price:

- There may be additional charges for substantial and substantive changes made to the recruitment brochure after the brochure has been approved by the Organization and the position has been posted online. Organization would be notified of any supplemental costs prior to changes being made.
- At your request, SGR can conduct an online stakeholder survey to help identify key issues or priorities that you may want to consider prior to launching the search. SGR provides recommended survey questions and sets up an online survey. Stakeholders are directed to a web page or invited to take the survey by email. A written summary of results is provided to

the Organization. Please note that this type of survey may extend the recruitment timeline.*

- Online interviews over and above the 15 included in the Fixed Fee. *
- Additional comprehensive stage 2 media reports over and above the maximum of five (5) included in the fixed price above. *
- Additional background investigation reports over and above the maximum of five (5) included in the fixed price above. *
- Additional reference checks over and above the maximum of five (5) included in the fixed price. *
- DiSC Management assessments.*
- Semifinalist and finalist briefing materials will be provided to the Organization via an electronic link. Should the Organization request printing of those materials, the reproduction and shipping of briefing materials will be outsourced and be billed back at actual cost.
- Additional onsite visits by the recruiter over and above the two (2) onsite visits included in the fixed price are an additional cost. Travel time and onsite time are billed at a professional fee per day. Meals are billed back at a per diem rate per meal. Mileage will be reimbursed at the current IRS rate. All other travel-related expenses are billed back at actual cost with no markup for overhead.*
- The organization bears the cost of candidate travel, and candidates are reimbursed directly by the organization.
- If the organization desires any supplemental services not mentioned in this fee proposal, an estimate of the cost will be provided at that time, and no work shall be done without approval.

**Exact fees for additional services are included in Tab E.*

Billing

SGR will bill the fixed fee in four (4) installments: 30% upon contract execution, 30% after the applicant pool is presented, 30% after finalist interviews, and 10% upon acceptance of employment. Ad placement expenses and supplemental services/other expenses will be billed as incurred or provided. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Scope of Services

Service Category #1: Executive Search & Recruitment Services Limited Scope Recruitment

Overview

The Limited Scope Recruitment includes:

- **Professional Services** provided by designated executive recruiter.
- **Position Profile Brochure.** SGR utilizes a professional graphic designer and professional writer to produce a position profile brochure based on information and photos provided by the Organization. The brochure is reviewed and revised in partnership with the Organization until the Organization agrees that it accurately reflects the community, Organization, position, and desired attributes.
- **Marketing & Advertising**
 - The marketing period spans over thirty (30) days to a maximum of forty-five (45) days, as specified by Organization.
 - Custom-made graphics for email and social media marketing.
 - Announcement in SGR's servant leadership e-newsletter, which reaches over 40,000 subscribers across all 50 states
 - Post on SGR's website (GovernmentResource.com)
 - Ad on SGR's Job Board (SGRjobs.com), the 2nd largest local government job board in the nation, which averages more than 16,000 unique visitors per month and has more than 2,000 jobs listed at any given time.
 - Targeted job blast to our opt-in subscriber database for SGR recruitments only
 - Promotion on SGR's LinkedIn.
 - Evaluate position and develop list of ad placement recommendations based on type of position and region.
 - Write advertising copy.
 - Place ads (pass-through costs for ad placements not included in the fixed price).
- **Application Management & Screening** – SGR's designated executive recruiter will:
 - Receive resumes and cover letters on behalf of the Organization through SGR's applicant tracking system,
 - Communicate with applicants throughout the application submittal period,
 - Email or schedule a phone call with the Organization on a weekly basis to provide an overview on the status of the search,
 - Evaluate applicants,

- Conduct a virtual briefing with the Organization after the position closes,
- Send emails to retain or release applicants after the briefing with the Organization,
- Provide application materials of retained applicants to the Organization, and
- Transition search to the Organization.

Limited scope recruitments are offered for non-public safety positions and positions that do not report to a governing body.

Supplemental Services/Other Expenses not included in the fixed price:

- **Stakeholder Survey**
 - SGR will provide recommended survey questions within three (3) business days of project initiation. SGR will set up an online survey within one (1) business day after the Organization has reviewed and approved the survey questions. Stakeholders can be directed to a web page or invited to take the survey by email. SGR and the Organization will agree to the open survey time period, typically ten (10) to thirty (30) days.
 - The Organization shall be responsible for marketing and promoting the survey to stakeholders.
 - A written summary of results is provided to the Organization within three (3) business days of survey close date. Survey is not validated statistically.
- **Recorded Online Interviews**
 - SGR provides recommended position-specific questions for Organization approval, prompts candidates to complete online interviews, and emails a link to Organization to view the recorded interviews.
 - Candidates are typically given five (5) to seven (7) days to complete the interviews. SGR will provide a link with the candidate interviews within two (2) business days after candidates complete the recorded interviews.
- **Comprehensive Media Reports**
 - SGR uses a proprietary media search process to go far beyond automated Google/LexisNexis searches. SGR's process is customized to provide a comprehensive media search on each candidate.
 - SGR will provide media report via email within two (2) weeks of receiving completed release form from candidate.
- **Management Style Assessments**
 - SGR uses the DiSC Management psychometric assessment to provide detailed insights regarding how a candidate would lead and manage an Organization. SGR will also provide a DiSC Management Comparison Report, which presents a side-by-side view of each candidate's preferred management style.

- Candidates are typically given two (2) to three (3) business days to complete the assessments. The assessment reports will be provided to Organization within two (2) business days of assessment completion by candidates.
- **Background Investigation Reports**
 - Through SGR's partnership with a licensed private investigations firm, we are able to provide detailed comprehensive background reports.
 - Background check reports include: SSN trace and address verification; credit bureau report (if requested); personal information, address, and employment comparisons; county criminal and civil records search (for counties where the candidate has lived or worked in the last 10 years); state criminal records search (for states where the candidate has lived in the last 10 years); county warrants and warrants (for counties where the candidate has lived or worked in the last 10 years); Federal criminal records search; InstaCriminal national search; Global homeland security search; sex offender records search; driving/motor vehicle records; education verification for highest degree obtained; employment verification (if requested); and military verification (if requested).
- **Reference Checks**
 - SGR provides the Organization a specific list of contacts to request from the candidate, based on the type of position. SGR provides a written (anonymous) summary of reference checks.
- **Supplemental Services**
 - If the Organization desires any supplemental services not mentioned in this section, an estimate of the cost and hours to be committed will be provided at that time, and no work shall be done without approval.

Reimbursable Expenses not included in the fixed fee:

- **Ad Placements.** Ad placements are billed at actual cost. No ad placement costs will be incurred without prior approval of Organization.
- **Reproduction Costs.** Reproduction costs are not anticipated or taken into consideration in component search pricing.
- **Shipping.** Shipping charges are billed at actual cost.
- **Travel.** Travel is not anticipated or taken into consideration in component search pricing. If the Recruiter and Organization agree that Recruiter travel is beneficial for the component search, travel time for the recruiter will be paid at an hourly rate, plus a separate daily rate for each day the recruiter is working onsite, regardless of number of hours worked. Travel expenses will be reimbursed in accordance with SGR's travel policy rates.

Project Personnel

The recruiter for your search will be selected based on their specialized experience and expertise. To view the bios for all SGR Recruiters, please visit the Recruiter section on the SGR website at: [Meet the Team](#)

Terms and Conditions

The Organization agrees to:

- Provide photos/graphics and other information (job description, budget documents, links to web pages, etc.) needed to develop position profile brochure.
- Respond to drafts of documents and reports in a timely manner; failure to do so may extend timelines and can negatively impact the outcome of the process. There may be additional charges for changes made to the Position Profile Brochure after the brochure has been approved by the Organization and the position has been posted online.
- Refer all prospective applicants to SGR and not to accept applications independently during the recruitment process.
- Specify how long SGR will accept applications for the position, up to a maximum of 45 days.
- Provide SGR with a list of any candidates to be released within two (2) weeks following the briefing with SGR. At that time, SGR will release any candidates that will not continue in the process and email the remaining candidates that the Organization will be the primary contact from that point forward. If the Organization does not provide a list of candidates to be released, SGR will email all candidates and notify them that the Organization will be the primary contact from that point forward. SGR will then consider services fulfilled.
- Not discriminate against any candidate on the basis of age, race, creed, color, religion, sex, sexual orientation, national origin, disability, marital status, or any other basis that is prohibited by federal, state, or local law.
- If the Organization wishes to place ads in local, regional, or national newspapers, the Organization shall be responsible for paying directly for the ads and for placing the ads using language provided by SGR.
- The Organization bears the cost of candidate travel, and candidates are reimbursed directly by the Organization.

If the Organization is not satisfied with the applicant pool, SGR must be notified within three (3) weeks of triage briefing date, and SGR will then coordinate with the Organization to reopen position, for a maximum of 45 days, at no additional charge to the Organization (with the exception of reimbursable expenses). After the second posting of position, each additional opening will be charged as a new position for the full fixed fee.

Billing

SGR will bill the fixed fee for the Limited Scope Recruitment in two (2) installments: 50% upon contract execution and 50% upon completion of services. Expenses, including reimbursable ad placement expenses, and supplemental services will be billed as incurred or provided. Payment

terms are thirty (30) days from date of invoice. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Scope of Services

Service Category #3: Succession Planning

Next Generation Leadership Program

SGR will be an active partner in helping your organization plan, develop, and execute this program. This program includes SGR collaborating with the organization in the development of the NGL Program, facilitating a half-day workshop each month with participants, and includes the training of mentors for the program. It is based on a cohort of 20 participants meeting once a month for 8 to 10 months.

Program Overview

The Next Generation Leadership (NGL) program is designed to assist your organization in providing a comprehensive approach to developing your staff's professional management skills. The goal of the program is to systematically develop leadership expertise in alignment with the organization's core values, to reinforce those core values within the entire organization, and to pass along important institutional knowledge, DNA, and culture. The NGL will provide advanced training to your staff members so that they can reach their leadership potential, enabling them to add even more value to the quality of service that the organization provides to its residents and stakeholders.

This program relies heavily on collaboration with your organization and your team leaders to determine the specific topics most valuable and necessary for the participants. In addition to helping create the syllabus for the class, team leads are called upon to serve as mentors and co-facilitators for the classes.

This approach utilizes multiple methods of information processing, making it exceptionally effective for long-term learning due to the fact that we remember only 10% of what we hear, but we remember as much as 90% of what we hear, see, say, and do.

Optimal learning occurs when both pre-session and post-session assignments are employed to help participants prepare and reflect on what takes place during the workshop sessions.

The NGL will utilize small groups for sharing and debriefing information, as well as mentoring between participants and team leaders. Participants will interact with the leadership concepts in light of their present situations, providing them with lessons and skills that are applicable to their current and prospective roles.

It is important to teach participants what good leaders do, and it is equally as important to teach them the *why* behind what good leaders do. Learning to think critically in the present and toward the future is one of the most important skills that NGL will help instill into the mindsets of the staff members.

The Next Generation Leadership program

This program is more than just a class or two on leadership. It's based upon the time-tested principles of servant-leadership and widely accepted principles for how adults effectively learn. Below are some of the key components in the NGL approach:

- Monthly workshop sessions covering a variety of topics related to leadership skills and professional development.
- Pre-session and post-session assignments that help participants prepare and reflect on what takes place in the workshop sessions.
- Small discussion groups that allow participants the opportunity to learn from others and to "try out" their own ideas in a safe, but dynamic, environment. These small group discussions go beyond the scheduled sessions. SGR will create online "cohorts" so that participants can share ideas, discuss articles, and continue to grow outside of the "classroom" experience.
- "Reflective Experience" exercises during which participants write about work experiences in case study format and share it with their peer groups for feedback. This allows participants to gain insight from various points of view, contributing to the essential organizational leadership skill of listening and understanding the different perspectives of their colleagues and employees.
- Mentoring between upper-level team leaders and staff members (Protégés) who are less far along in their leadership careers.
- Developing leaders need to exercise good leadership in their current roles and their future ones. Learning to apply leadership principles from different sectors serves as a multiplying force in participants' leadership abilities. The workshop sessions allow participants to study leaders from all eras and walks of life for a broad view of management styles and perspectives.

Workshop Session Format

The staff members will meet once a month for 4 hours over a 8 to 10 month period. At the conclusion of the NGL, the group will be assigned a real problem or issue to work together on to develop a solution, which will be presented to the Executive Team.

Participants will be expected to prepare for each session by completing assignments given at the conclusion of the previous session. These assignments will be both reflective and preparatory. The reflective exercise will solidify what was learned in the previous session, and the preparatory exercise will prepare them for the new material to be covered in the upcoming session.

Each session will incorporate a variety of learning experiences that will equip participants with different learning styles to interact with the material in different ways. The sessions will be interactive, presented in a rapid pace, focused more on discussion and dialogue than on lecture, and designed to be intellectually stimulating, intensely practical, and in alignment with the Core Values of your organization.

Session Topics

The precise topics will be developed in conjunction with your organization. Below are examples of common topics chosen for SGR's previous Next Generation Leadership programs:

- Tools for Being a Successful Leader
- Leadership and Customer Service
- The Leader and Core Values
- Strategic Visioning
- Team Building
- Communication
- Execution
- Perseverance and Resilience

Program Format

1. Sessions will be half-day workshops, typically from 8 am or 9 am to 12 pm. These sessions will feature presentations, discussions, articles to review, leadership models, and interviews. SGR facilitators will guide the sessions, but participants will be actively engaged in the learning process.
2. Each participant will be paired with a mentor within the organization who is not in their department. These mentors will be selected by the organization and trained by SGR in advance of the start of the program. This training will include how to harness the lessons from their experience and how to facilitate the Mentor/Protégé meeting each month.
3. The Mentor and the Protégé will meet each month for 1-2 hours, typically following the monthly class. However, the purpose of the Mentor/Protégé meeting is not necessarily to discuss the topic from the class—unless the Protégé wishes to. The Protégé and the Mentor will determine what the topic will be for each meeting, and it may or may not be related to the material in the class. The purpose of the Mentor/Protégé relationship is to be an avenue for broader learning experiences than the specific topics discussed within the workshop sessions.

Teaching Methods

- PowerPoint Presentations/Discussions
- Case Studies - These will come from various sources, including Department Heads and Supervisors, and will reflect the complexity and tension that leaders often face when addressing issues.
- Field Trips - The Organization/Executive Team will select the number and specific sites for field trips so that participants can see "the organization in action."
- Reflective Experiences – Each month participants will be required to do a one page "write

up” of a situation they were involved in where they had to display the leadership skills that the course discusses. These will be shared for encouragement and reflection with their Mentor.

- Expert and Panel Discussions – Throughout the program, there will be times when material will be best understood through inviting experts to participate in panel discussions. These panelists will often be Department Heads but might also include selected guest experts as chosen by the Organization/Executive Team.
- Interactive exercises and small group discussions which provide participants the opportunity to develop their leadership and team building skills.
- Mentoring Relationships – During the 4-hour workshop sessions, time will be given for the Mentor and Protégé to meet together. This is typically the last hour of the class and can be onsite, off-site, or even over a lunch together. The Mentor does not need to be in the session for the entire 4 hours, although they are free to sit in on any session.
- As a manner of reinforcing your organization’s core values, special attention will be given each session to discussing how the current topic relates to the core values. Supervisors and Department Heads will be asked in advance to share any insights and experiences that illustrate the importance of those Core Values.

Delivery

An SGR Facilitator will develop and present the class, in collaboration with a co-facilitator of your organization’s choosing. SGR will work with your organization to identify a co-facilitator from the organization for each session. This format allows SGR to provide continuity and a general perspective on leadership, while the co-facilitator would provide more specific expertise and would help ensure that the unique DNA of your organization is being transferred to participants.

Under this option, SGR will:

- Develop and provide customized presentations covering the agreed upon topics which will identify clear learning objectives and incorporate various learning methods. This will include a printed schedule for each segment of each half-day session to ensure that the material is covered in a thorough yet efficient manner.
- Develop a participant’s notebook that will provide a place to take notes and a list of related resources. This will also provide a place to record and place items about each topic that they find in the future.
- Provide any logistical services needed to make each class a first-rate learning experience, including any “behind the scenes” work such as securing the participation of expert panelists, including both organization employees and outside guests.
- Provide any assistance needed in selecting mentors for the program.
- Provide an experienced facilitator for each workshop session to help provide continuity, direction, and excellence for the program.

Scope of Services

Service Category #5: Interim Executives

Interim Management Services

Project Methodology

Overview

SGR provides a comprehensive scope of interim management services, and each interim management contract is tailored to meet the client's specific needs. However, an interim management search typically entails the following:

- 1. Organizational Inquiry and Analysis**
 - Initial Interview to Determine Organizational Needs

- 2. Evaluation of Interim Candidate Pool**
 - Review Experience and Qualifications of Candidate Pool
 - Determine Best Match for Interim Assignment
 - Update Candidate's Stage 1 Media Search Report

- 3. Proposal and Selection of Interim Candidate**
 - Recommended Interim Candidate for Approval
 - Schedule Interview of Recommended Candidate
 - Finalize Candidate Selection
 - Conduct Comprehensive Media Search
 - Complete Background Investigation

- 4. Onboarding Process**
 - Finalize Assignment Details
 - Notify Interim Candidate of Assignment Commencement

- 5. Assignment Period**
 - Check-ins to Ensure Client Satisfaction
 - Process Weekly Interim Contractor Time Sheets

- 6. Conclusion of Assignment**
 - Close Assignment

Step 1: Organizational Inquiry and Analysis

In the Organizational Inquiry and Analysis Stage, SGR devotes tremendous energy to understanding your unique culture, environment, and goals to ensure the right match for your particular needs.

Interview to Determine Organizational Needs

Fully understanding your needs is the most critical part of conducting a successful interim management search and placement. SGR conducts an interview to find out more about the position, special considerations, and the political environment. These interviews last approximately 30 minutes to one hour and identify individual issues that are relevant to the search, as well as develop a composite understanding of the organization's preferences.

Step 2: Evaluation of Interim Candidate Pool

SGR fully vets all local government professionals who make up our Interim Candidate Pool.

Review of Candidate's Experience and Qualifications.

Reviewing resumes is an important and valuable step in the interim search process, and SGR's goal is to have a clear understanding of the person behind the resume and what makes him/her an outstanding interim prospect for you.

Finding the Best Match

SGR uses the information obtained in the initial interview and conversations to find the interim candidate who will be the best match for your organization.

Update of Candidate's Stage 1 Media Search Report

SGR conducts a Stage 1 media search on each individual in our Interim Candidate Pool. Once SGR determines the best candidate to recommend, the media search report is updated for that candidate. This involves a review of all newspaper articles mentioning the candidate in major news outlets within the previous two years.

Conduct Comprehensive Media Search Report

These media reports are compiled by utilizing our proprietary media search process including variations of the candidates' names and states/cities in which they have lived or worked, and searches of local papers where the candidates have lived or worked. We also search social media sites. The Comprehensive Media Report typically ranges from 20-300 pages per candidate and may include news articles, links to video interviews, blog posts, etc.

Comprehensive Background Investigation Reports

Through SGR's partnership with a licensed private investigations company, we are able to obtain a comprehensive background screening reports that include detailed information such as:

- Social Security number trace
- Address history

- Driving history/motor vehicle records
- Credit report
- Federal criminal search
- National criminal search
- County wants and warrants
- Global homeland security search
- Sex offender registry search
- State criminal search (for current and previous states of residence)
- County criminal search (for every county in which candidate has lived or worked)
- County civil search (for every county in which the candidate has lived or worked)
- Education verification

Due to the personal nature of the report, the actual background report will not be given to your organization, however, your organization will be notified of any issues discovered.

Step 3: Proposal and Selection of Interim Candidates

Recommend Interim Candidate for Approval

SGR will recommend the candidate we believe is the best match to serve in the interim position for your organization. If you desire, SGR will recommend several candidates with which interviews can be scheduled you make your final decision.

Finalize Candidate Selection

Once you have approved the interim candidate of your choice, SGR will notify the selected candidate.

Step 4: Onboarding Process

SGR will work with you and the selected candidate so the assignment can begin quickly.

Finalize Assignment Details

SGR will finalize the details of the assignment, including location, start date, responsibilities, and any other necessary information.

Notify Candidate of Assignment Commencement

SGR will notify the candidate of his/her selection and provide them with all of the information they will need to begin the assignment.

Step 5: Assignment Period

It is important that you are completely satisfied with the candidate selected for the interim position. If at any time, you do not feel like the candidate is the right fit for your organization, SGR will provide another interim candidate that meets your expectations.

Check-ins

SGR will conduct check-ins with all parties to ensure that you are satisfied with the work being performed.

Process Contractor Time Sheets

SGR provides the selected candidate with a contractor time sheet to log hours worked. The client will be asked to sign the time sheet to verify the hours worked at the end of each week. SGR will process the time sheet and pay the interim candidate.

Step 6: Conclusion of Assignment

Once the interim assignment is concluded, SGR will coordinate with your organization to close out the contract.

Close Assignment

At the conclusion of the assignment, SGR will coordinate with your organization and the interim on the final work day. SGR will obtain the final time sheet from the interim candidate, and your organization will perform any exit processes necessary with the interim candidate.

Client Satisfaction Survey

SGR works very hard to deliver exceptional customer service and it is important that we receive honest and objective feedback from our clients. We may ask you to complete a client satisfaction survey and discuss any feedback and suggestions you may have that will help us in our goal of continuous process improvement.

Fee Structure & Service Guarantee

SGR will provide a highly qualified interim manager at an hourly rate based on the total amount the City has in the current fiscal year budget for compensation of the position including, but not limited to:

- Base Salary
- FICA
- Worker's Comp
- Retirement
- Medical Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Long/Short Term Disability Insurance
- Longevity Pay
- Deferred Compensation
- Technology Allowance (cell phone, computer, etc.)
- Car Allowance
- Professional Membership Dues
- Any Other City Provided Benefit

(Example: Salary + All Benefits ÷ 2080 hours = Hourly Rate)

Hourly rates are subject to change based on market demand.

Depending on the location of the permanent residence of the selected interim candidate, the City may need to provide a mileage/travel stipend and/or temporary lodging, such as a hotel direct billed to the City during the term of the assignment.

Total Costs:

- Hourly rate – paid for hours worked
- Comprehensive Media Search*
- Background Report*
- Mileage/Travel/Temporary Lodging if necessary*
- If City hires the candidate placed as Interim for a permanent position during the term of this agreement or within 12 months after the conclusion of this agreement, City will pay SGR an employment placement fee of \$10,000.00. This fee is waived if SGR conducts a full-service executive search for this position.

**Additional fees apply.*

Billing

SGR will submit an invoice bi-weekly for the previous 2 weeks' work and any travel/housing reimbursement. The invoice is due within 14 days of receipt. Balances that are unpaid after the payment deadline are subject to a fee of 5% per month or the maximum lawful rate, whichever is less, on the owed amount every month, charged monthly until the balance is paid.

Provision of Service Guarantee

SGR guarantees that you will be satisfied with the interim candidate placed with your organization. If at any time, you do not feel like the candidate is the right fit for your organization, SGR will provide another interim candidate who meets your satisfaction, pending availability of suitable candidates.

Scope of Services

Service Category #6: Other Related Consulting Services

Leadership Development

Management Team Workshops and Elected Officials Retreats

SGR offers customized Management Team Workshops and Elected Officials Retreats built around your needs. These leadership development tools can be designed to foster a team environment, promote employee engagement, and provide effective professional development in a fun, dynamic, and engaging atmosphere.

Workshops and retreats are scheduled in four-hour blocks and can range from four hours to multi-day events based upon need.

Management Team Workshops

Our customized Management Team Workshops are developed with your organization and goals in mind. We will work with you to develop an agenda that is dynamic and engaging and accomplishes your specific objectives.

SGR's top workshops include:

- Creating a Servant Leadership Culture
- I Opt® Workshop*
- The Five Dysfunctions of a Team
- Executive Book Briefings

**See more information about I Opt® Assessments and their strengths below.*

Elected Officials Retreats

Elected Officials Retreats allow you to elevate your governing board's performance and drive impactful decision-making through SGR's unrivaled expertise in facilitating retreats for local governments.

Examples of Elected Officials Retreats include but are not limited to:

- Strategic Visioning
- Team Building
- Effective Governance
- Multi-Purpose Retreats

Assessments

Developing more self-awareness is one of the keys to being an effective leader, and that's one of the main benefits of using personality profiles and assessments. We've often seen teams become much more cohesive simply by taking time to talk together about the results of their assessments. Over and over we've found that with an increase in self-awareness also comes an increase in empathy, teamwork, and efficiency. These instruments will help employees:

- Understand their strengths and weaknesses
- Understand how they fit in with the rest of their team
- Understand how their team is being perceived by both internal and external customers

You can purchase any of the following assessments as part of an assessment-focused workshop either in-person or via Zoom, on their own, or as a part of almost any SGR workshop. SGR only uses validated tools like DiSC®, I Opt®, and Clifton StrengthFinders because we value having confidence in the accuracy and reliability of these tools.

I Opt®

I Opt® stands for **Input Output Processing Template**. It is a tool that measures how a person perceives and processes information. How someone perceives and processes information has a profound impact on what motivates a person, how a person "sees" an issue, and how that person interacts with others on team projects. Understanding one's own I Opt® Profile makes it possible to be more self-aware and helps predict how they will approach any given situation.

Through I Opt® Workshops, teams recognize more than just, "We're different." They understand why people are different, what the implications of those differences are, and most importantly, how to maximize those differences to make them a more effective team.

DiSC®

DiSC® is a **personal assessment tool** used to improve work productivity, teamwork, and communication. DiSC® is non-judgmental and helps people discuss their behavioral differences.

The DiSC® Management assessment analyzes and reports comprehensively on the candidate's preferences in five vital areas: management style, directing and delegating, motivation, development of others, and working with his/her own manager. View a sample report at: [DiSC® Assessment Report](#).

For assessments of more than two participants, a DiSC® Management Comparison Report is included, which provides a side-by-side view of each candidate's preferred management style. View a sample comparison report at: [Comparative DiSC® Report](#).

Live Training

SGR's course catalog includes a wide range of live training events that can help your organization be its very best by simply helping your people become authentic and effective servant leaders. **Review the extensive Live Training Course Catalog included on the next page.**

Additional Leadership Development Service Details

Facilitators:

The facilitator(s) for your event will be selected based on their specialized experience and expertise. To view the bios for all SGR Facilitators, please visit the facilitator section on the SGR website at: [Meet the Team](#)

Requested Logistical Support from the Organization for on-site events:

1. A meeting location, break coordination, and expenses.
2. All AV set up, including a lapel microphone, laptop, and projector with power point capability, as well as the ability to play videos with adequate sound for a full room to easily hear.
3. Printing of all materials, if applicable.
4. Two chart-size, "Post It" style pads with sticky backs, six different colored large size markers (wide tip).



LIVE TRAINING CATALOG

**PARTNERING WITH LOCAL GOVERNMENTS TO
RECRUIT, ASSESS, & DEVELOP INNOVATIVE, COLLABORATIVE, AUTHENTIC LEADERS**

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For more information please visit us at governmentresource.com or contact us at training@governmentresource.com.



*To help your
people achieve
greatness...
prepare them
BEFORE
you promote
them.*

SGR understands that creating a leadership development pipeline, a strong overall succession plan, and a healthy culture for your organization is a high priority. Let us help you promote team engagement and provide team members with training and professional development opportunities that are tailored to specifically meet the needs of local government.

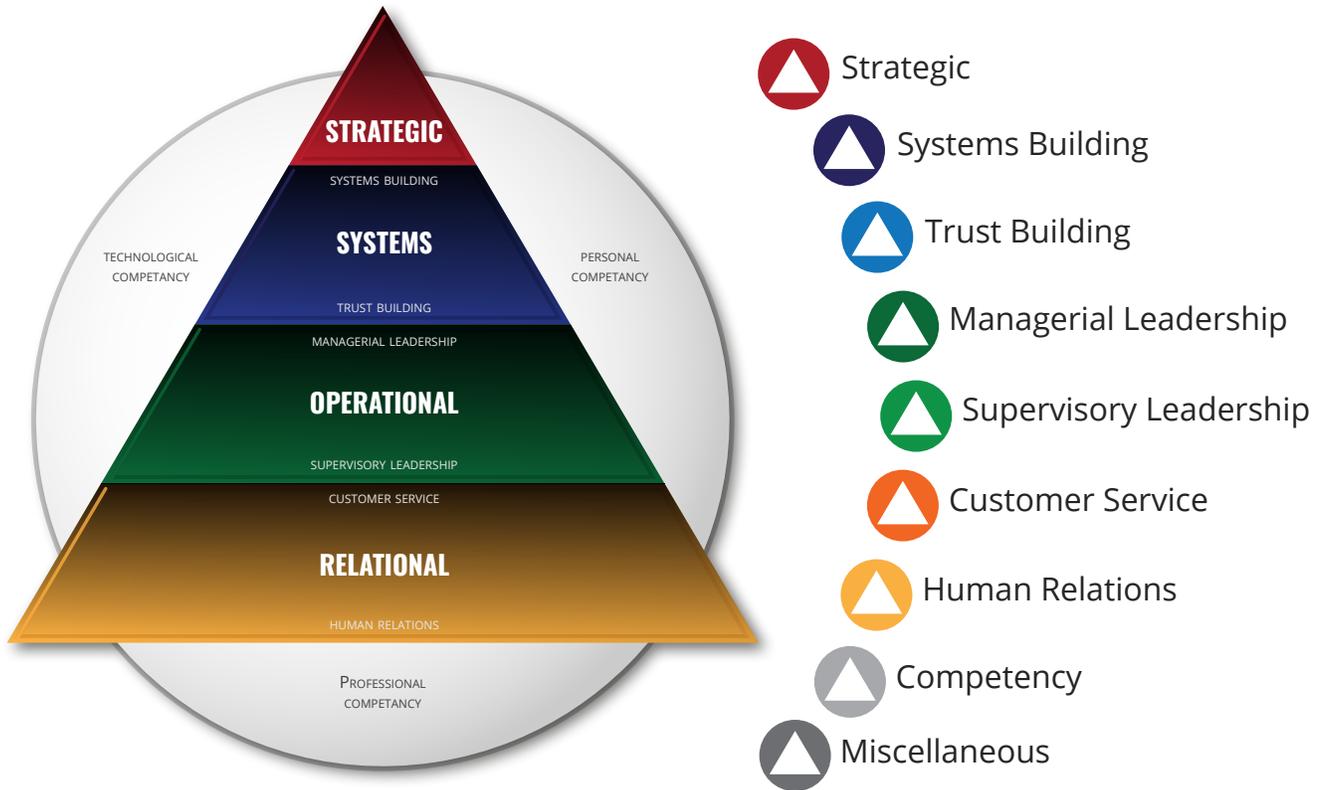
This catalog includes a wide range of live training events that can help your organization be its very best by simply helping its people become authentic and effective servant leaders.

Ready to get started? Feel free to reach out at any time; our team is always available to help you strengthen your training and leadership development programs!

A handwritten signature in black ink that reads "Ron Holifield". The signature is written in a cursive style.

Ron Holifield
CEO of Strategic Government Resources

SGR's 4TH DIMENSION LEADERSHIP MODEL



SGR's 4th Dimension Leadership Development Model recognizes that leaders can be developed – but that a coherent, planned and holistic building block approach must be utilized to achieve genuine leadership competency and effectiveness. It starts by recognizing that all employees exercise some degree of leadership regardless of position. Leadership at the front line is very different than leadership at the top, but using relational leadership skills to accomplish desired outcomes is still critical for maximum success.

Relational Leadership comprises both Human Relations and Customer Service competencies where people follow primarily because of how they are treated.

Operational Leadership comprises both Supervisory and Mid-Management Competencies where people follow primarily because of positional and intellectual authority.

Systems Leadership comprises both Systems Building and Trust Building competencies where leadership transitions from personal dynamics, into a focus on building effective systems that instill trust. For these three predecessor levels, the focus is helping an organization get better at what it does.

Strategic Leadership focuses on what is more external and emphasizes how to transform an organization into who it wants to become while primarily focusing on Department Heads and above. The methodology used in facilitating leadership development is very different than traditional training, relying primarily upon dynamic participant engagement which is best described in SGR's Leadership Development Catalog.

WHY INVEST IN LIVE TRAINING?

Live Training is an excellent foundation for building out a year-round training and development program for your organization. It also happens to be the most effective option in driving employee engagement with great opportunities for team building and interaction as they explore how topics might relate to their daily work.

This catalog is comprised of compliance and general professional development related topics that are best suited for supervisors and/or all staff. Each event has been specifically developed with your organizational needs in mind such as all scenarios being applicable to local government and the option to designate an internal representative to attend live training so that employee questions can be thoroughly addressed or referred to the appropriate department regarding their organization's specific policies (especially valuable for compliance topics).

HOW DO LIVE TRAINING EVENTS WORK?

SGR's live training events are available to be booked as "closed" events or can be opened up to other local government professional areas. In many cases, this can help organization's reduce training costs. SGR is in many cases also able to accommodate special requests such as: the blending of two or more topics into a hybrid class, changing the duration of an event, or simply developing custom training to meet your needs.

ARE LIVE TRAINING EVENTS OFFERED IN ZOOM?

Yes, some of SGR's live training events are available in a virtual live setting via Zoom. SGR recognizes the need and the value that virtual live training provides, by allowing participants to attend events remotely right from their computers. Events in this format have been modified to be 90 minutes in length (unless otherwise noted) that focus on the event's key learning objectives. Additionally your organization can choose your own virtual platform and administrator. Contact SGR at: training@governmentresource.com

For these sessions, SGR provides: event registration, event correspondence, class deliverables electronically (i.e. participant guide), the virtual platform, a class facilitator, and a class administrator (to moderate the session).

Events that are available in this format are denoted throughout the brochure with the following logo:



LIVE TRAINING PRICING GUIDE

	1	2
	LIVE TRAINING FOR YOUR ORGANIZATION	VIRTUAL LIVE TRAINING
DURATION	2 Hours 4 Hours	90 to 120 Minutes
COST	See Tab E - Proposal Pricing	See Tab E - Proposal Pricing
FACILITATOR	SGR	SGR
TRAVEL FEES	Yes	N/A
REGISTRATION	Closed	Closed

Use the table in combination with this Catalog to determine which topics you'd like to bring to your organization.

PERFECT FOR:

Organizations needing an SGR facilitator to deliver live training.

Select any title from SGR's Live Training Catalog.

*Seat limits may apply.
Recommended class size is 35,
maximum size is 50.*

PERFECT FOR:

Organizations looking for an affordable and flexible way to provide live training to their employees via Zoom.

Select any title from SGR's Live Training Catalog that's accompanied with the following logo:



Contact us at Training@Governmentresource.com for more information.

LEADERS DON'T CREATE MORE FOLLOWERS, THEY CREATE MORE LEADERS.

LIVE TRAINING CLASS LISTING



Systems Building

- Intro to Servant Leadership Principles [p.9](#)
- Problem Solving and Decision Making [p.9](#)
- Pruning Negativity [p.9](#)
- Relating to Different Personalities [p.9](#)
- Strategic Planning [p.10](#)
- Succession Planning [p.10](#)
- Supervising Customer Service Values [p.10](#)
- Supervising Ethical Behaviors [p.10](#)
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TWENTY-FIRST-CENTURY LEADERSHIP RELATIONSHIP DYNAMICS ARE FROM THE BOTTOM UP RATHER THAN THE TOP DOWN; FROM THE OUTSIDE IN, RATHER THAN THE INSIDE OUT.

SYSTEMS BUILDING

INTRO TO SERVANT LEADERSHIP PRINCIPLES

Target Audience: All Employees

Key Themes: Leadership, Organizational Culture, Trust Building

Author: SGR

Duration: 90 Minutes & 4 Hours



This class is designed as an introduction to the principles of Servant Leadership as originally articulated by Robert Greenleaf in his breakthrough essay, "The Servant as Leader." Participants will review the twelve principles identified as characterizing servant leadership, but this class is more than just hearing about philosophies. Participants will also be presented with short biographies about servant leaders from a variety of backgrounds. Discussions will center around lessons gleaned from these leaders with an emphasis on helping participants apply these lessons to their own situation. Finally, the class will review a case study that allows participants to discuss the impact servant leadership can make in the midst of adversity within a local government context.

PROBLEM SOLVING AND DECISION MAKING

Target Audience: Managers & Executives

Key Themes: Professional Development, Strategic Planning

Author: SGR

Duration: 90 Minutes & 4 Hours



Leadership often requires thinking through complex problems and providing decisive answers. Problem Solving and Decision Making instructs leaders in employing a three-step process to solve problems: understanding the issue, finding solutions, and planning next actions. This class includes activities to promote creative problem solving and techniques to identify the starting issue, desired outcomes, and root causes of problems. In addition, it provides an opportunity to develop a personalized action plan for solving problems and making decisions in the future.

PRUNING NEGATIVITY

Target Audience: All Employees

Key Themes: Communication, Trust Building

Author: SGR

Duration: 90 Minutes & 4 Hours



Negativity is a crushing, poisonous epidemic in the workplace that drains employees of energy and enthusiasm. Pruning Negativity trains participants how to handle negativity in themselves, their co-workers, and their customers appropriately and effectively, as well as how to prevent negativity in the future. This class uses the analogy of "Pruning the Negativity Tree."

RELATING TO DIFFERENT PERSONALITIES

Target Audience: All Employees

Key Themes: Communication, Trust Building

Author: SGR

Duration: 90 Minutes & 4 Hours



Being able to recognize and relate to different personalities in the workplace is essential to building and developing your team. This class starts by exploring and recognizing four different personality styles and then hones the focus on three key relational principles: acceptance, appreciation, and assistance.

STRATEGIC PLANNING

Target Audience: Executives

Key Themes: Strategic Planning

Author: SGR

Duration: 4 Hours



Systems Leadership is about putting processes in place to make an organization run more efficiently and effectively. Strategic Planning instructs leaders in a five-step process: envisioning the mission, performing a strategic audit, identifying strategic goals and objectives, composing an action plan, and evaluating the results. The class includes exercises to improve participants' goal setting skills, demonstration of the written format for a strategic plan, opportunities to develop a step-by-step strategic plan, and small group discussions of case studies.

SUCCESSION PLANNING

Target Audience: Executives

Key Themes: Strategic Planning

Author: SGR

Duration: 4 Hours



Almost 7,900 baby boomers retire every day. Many local governments report more than 70% of their current workforce is eligible to retire. Despite this, few organizations have adequately prepared a leadership pipeline that will ensure continuity and competence in their next generation of leaders. Succession Planning provides a practical strategy and game plan for an organization to develop a qualified pool of leaders ready to be promoted as the generation shift occurs.

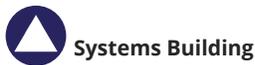
SUPERVISING CUSTOMER SERVICE VALUES

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Participants will focus on the challenge of leading employees to exhibit extraordinary customer service values. They will identify problem behaviors and outcomes. Then participants will apply customer service values to various scenarios. Along the way, they will consider ways to lead and teach the values.

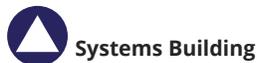
SUPERVISING ETHICAL BEHAVIORS

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Participants will focus on the challenge of guiding employees to behave in ethical ways. They will begin by building and defining an ethic. Then participants will recognize three trust relationships of municipal service. The class will then apply this information as they address right vs. right dilemmas.

SUPERVISING GENERATIONS

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Systems Building

Participants will focus on the challenge of providing what is best for each generation under their authority. They will discover and report on characteristics of Boomers, X-ers, and Millennials. Participants will predict which Servant Leadership principles will be most important to each generation. Along the way, they will discuss tips for managing themselves while supervising each generation.

SUPERVISING PERSONALITIES

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Systems Building

Participants will focus on the challenge of providing what is best for each personality under their authority. They will define and identify four quadrants of personality. Then, participants will discover and discuss how to lead various personalities and seek to apply this knowledge to their current supervisory leadership. Along the way, they will seek to apply this knowledge to their current supervisory leadership.

SUPERVISORY COMMUNICATIONS

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Systems Building

Participants will focus on the challenge of creating an environment conducive to effective communication. They will identify the goal and the elements of a communication cycle. Participants will define and illustrate tools and characteristics of effective supervisory communication and apply that knowledge to communications with diverse employees.

SUPERVISORY SERVANT LEADERSHIP

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Systems Building

Participants focus on Servant Leadership principles that will serve as a foundation for all other classes. Participants will define Servant Leadership, discover principles of Servant Leadership, and will address the tension between relationships and responsibilities.

TRUST BUILDING

BUILDING TRUST IN DIVERSE ENVIRONMENT

Target Audience: Managers & Executives

Key Themes: Team Building, Communication, Diversity

Author: SGR

Duration: 4 Hours

The old way of thinking - that differences must be avoided - is a barrier that prevents organizations from being truly successful. Creating a trusting environment is key to capitalizing on the diverse talent in an organization. Building Trust in a Diverse Environment instructs managers in how to create a productive, synergistic, trust-filled atmosphere for employees. This class facilitates a better understanding of the relationship between trust and diversity, and teaches participants to create a culture that respects individuality



Trust Building

COACHING FOR PERFORMANCE FOR MANAGERS AND EXECUTIVES

Target Audience: Managers & Executives

Key Themes: Trust Building, Coaching & Mentoring, Leadership

Author: SGR

Duration: 4 Hours

Helping employees achieve their potential relies on a trust relationship. An essential strategy for building trust is knowing when and how to utilize the differing skill sets of coaching, mentoring, and supervisory counseling. Coaching for Performance for Managers and Executives helps participants understand the difference in these three strategies and how to best utilize each of them to help their teams achieve maximum potential.



Trust Building

CONSTRUCTIVE CONFLICT

Target Audience: Managers & Executives

Key Themes: Professional Development, Communication

Author: SGR

Duration: 4 Hours

Conflict, strife, and opposing points of view are part of the workplace and part of life; this cannot be changed, but we can change the way we react and manage conflict when it occurs. In Constructive Conflict, you will discover practical, proven alternatives that will give you skills to harness in the most difficult and frustrating situations. This class requires the additional purchase of IOPT Assessments per participant.



Trust Building

EFFECTIVE INTERPERSONAL COMMUNICATION

Target Audience: Supervisors

Key Themes: Communication, Trust Building

Author: SGR

Duration: 90 Minutes & 4 Hours

Communicating effectively is critical to the success of any organization. *Effective Interpersonal Communication* identifies how to communicate appropriately with others and defines formal and informal channels of communication. In addition, participants learn positive communication techniques, how to recognize limitations to communication channels, how to decode nonverbal communication, and the art of active listening.



Trust Building

HONING YOUR EMOTIONAL INTELLIGENCE

Target Audience: Supervisors

Key Themes: Coaching & Mentoring, Employee Engagement, Leadership, Team Building

Author: SGR

Duration: 4 Hours



Trust Building

Great leaders move their teams by igniting passion and inspiring success. Honing Your Emotional Intelligence acknowledges and explains the complex mix of social and interpersonal behaviors that incorporate intuition, character, integrity, motivation, communication ability, and relationship skills. This class includes a self-assessment to measure participants' strengths and areas for improvement in emotional intelligence and practical situational exercises.

MANAGING EMPLOYEE PERFORMANCE

Target Audience: Managers & Executives

Key Themes: Personal Development

Author: SGR

Duration: 90 Minutes & 4 Hours



Trust Building

Meaningful performance management techniques maximize employee performance by communicating areas needing improvement, as well as areas of excellence, in ways that ensure the employee understands the expectations. Performance management is not an event, but rather a continual process that begins while the new employee is still on probation, continues through the career of the employee, and ends with the retirement party. The key to success is an effective performance management process. Managing Employee Performance teaches participants the steps in that process and provides tools to successfully implement each step.

**IF YOU CREATE THE RIGHT VALUES
AND CULTURE, NORMAL PEOPLE
WILL DO EXTRAORDINARY THINGS!**

Edward Hess

MANAGERIAL LEADERSHIP

HITTING YOUR TARGET: EFFECTIVE GOAL SETTING

Target Audience: Managers

Key Themes: Strategic Planning, Professional Development

Author: SGR

Duration: 4 Hours

Managing individual, team, or organizational goals requires managers to focus on key results areas and to set reasonable and achievable goals. Hitting Your Target: Effective Goal Setting instructs participants in the theories and best practices of goal setting, techniques for avoiding goal setting traps, and strategies for building goals as a team. This class includes discussion of the complete goal setting process, methods for attaining goals, management techniques for keeping a team on track, and a personalized action plan to set and meet goals.



Managerial Leadership

HOLDING SUCCESSFUL MEETINGS

Target Audience: All Employees

Key Themes: Professional Development, Process Improvement

Author: SGR

Duration: 2 & 4 Hours

Whether leading a meeting, or simply participating, it is important to get the most out of the time spent. Holding Successful Meetings teaches participants to plan and organize efficient meetings, conduct productive meetings, and interact appropriately in meetings. The class includes techniques to help participants write effective agendas, use time-saving tactics, and employ efficient methods for keeping meetings on task, as well as tips for making meetings meaningful.



Managerial Leadership

MANAGING A BUDGET

Target Audience: Managers

Key Themes: Professional Development

Author: SGR

Duration: 4Hour and 90 Minute;
Virtual Mini series part 1 & 2
(each 90 minutes long)

The budget is the single most important policy document a local government adopts. It is the tangible translation of the organization's mission, vision, and values into practical action and service delivery. Capable budget management is one of the primary responsibilities of a manager. Managing a Budget instructs managers in financial terms and concepts, as well as how to implement a comprehensive system to budget efficiently and effectively. This class provides participants with practical insights and understanding regarding budget management.



Managerial Leadership

ON YOUR MARK, GET SET, MOTIVATE!

Target Audience: Managers & Executives

Key Themes: Employee Engagement, Leadership, Team Building

Author: SGR

Duration: 4 Hours

On Your Mark, Get Set, Motivate! instructs participants in motivational theories, the role of the manager in motivating employees, and the three conditions of motivational management: confidence, trust, and satisfaction. This class defines motivation in the workplace, explains some of the classic theories of motivation, pinpoints some powerful needs that motivate people and how to relate motivators to them, and discusses how to develop motivational skills.



Managerial Leadership

PRESENTATIONS WITH AN IMPACT

Target Audience: All Employees

Key Themes: Professional Development

Author: SGR

Duration: 4 Hours



Managerial Leadership

The best presentations are both meaningful and engaging. This class is designed for employees who conduct formal presentations and want to enhance their presentation skills. *Presentations with an Impact* instructs participants in creating impressive presentations, from writing the content, to effective handouts and visual aids, to mastering the difficult question and answer session. The class includes step-by-step instructions on presentation preparation, handling nervous energy, and methods to improve writing, inflection, and storytelling.

PREVENTING SEXUAL HARASSMENT FOR SUPERVISORS

Target Audience: Supervisors

Key Themes: Compliance

Author: SGR

Duration: 2 & 4 Hours



Managerial Leadership

Sexual harassment and discrimination in the workplace are issues that cannot be ignored. Not only is there a considerable amount of liability for an organization, but there can be personal liability for a public employee as well. Preventing Sexual Harassment provides a comprehensive overview of sexual harassment prevention for public sector employees and includes a test to recognize harassment, principles to create a safe environment and mitigate risk, and discussion of actual workplace scenarios. Preventing Sexual Harassment for Supervisors uses scenarios and challenges that address the supervisory responsibilities regarding the prevention of sexual harassment in the workplace. Participants will learn how to quickly and wisely assess a situation and create an environment that upholds the standards that allow employees to work in a safe place.

PROJECT MANAGEMENT FROM START TO FINISH

Target Audience: Managers

Key Themes: Professional Development, Technical Development

Author: SGR

Duration: 4 Hours



Managerial Leadership

Project Management from Start to Finish offers insight into creating and implementing a systematic approach to manage a successful project and the tools to get it done. Topics such as Planning, Team-building, Risk-Management, and Communication are covered and exercised with insightful activities and discussion.

TOOLS FOR SUCCESSFUL LEADERSHIP

Target Audience: Managers and Executives

Key Themes: Leadership

Author: SGR

Duration: 90 Minutes & 4 Hours



Managerial Leadership

Successful Leadership explores the concepts of leadership and helps participants recognize leadership opportunities in the workplace and community. The Tools for Successful Leadership class teaches participants to identify the characteristics of effective leaders and the role that personal values play in leadership. Participants also learn to recognize the dynamic relationship between leaders and followers and to identify the difference between management and leadership proactively.

TRANSITIONING FROM PEER TO TEAM LEADER

Target Audience: All Employees

Key Themes: Leadership

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Managerial Leadership

Making the leap from peer to team or crew leader is never easy. New team leaders frequently struggle to balance their old co-worker relationships with their new responsibilities. Transitioning from Peer to Team Leader teaches participants skills and techniques to make this important transition a positive and productive experience. This class challenges participants to accept new realms of responsibility involving productivity, safety, and public image. Building on that foundation, learners then work together to discover the three keys to a successful transition: acknowledge realities, be observant, and serve proactively.

UNDERSTANDING AND UTILIZING PERFORMANCE MEASUREMENTS

Target Audience: Managers

Key Themes: Coaching and Mentoring, Leadership

Author: SGR

Duration: 4 Hours



Managerial Leadership

A high performing organization is reliant upon meaningful and effective performance measures. Unfortunately, too many organizations do not measure what matters, instead measuring too much of what does not matter. Understanding and Utilizing Performance Measurements equips managers to take their organizations to the next level by understanding, measuring, and interpreting the things that matter.

**“IT’S NOT ABOUT ME AND
IT’S NOT ABOUT NOW.”**

Ron Holifield

SUPERVISORY LEADERSHIP

THE ART OF EFFECTIVE DELEGATION

Target Audience: Supervisors

Key Themes: Compliance

Author: SGR

Duration: 90 Minutes & 4 Hours



Management can be defined as accomplishing things through others. In order to do that, supervisors must learn to delegate effectively. The Art of Effective Delegation focuses on organizing employees to accomplish goals by maximizing the use of delegation. Supervisors learn the benefits of delegating, how to overcome reluctance to delegate, and how to use tools to avoid lower to higher level delegating. In addition, participants identify multiple ways to “work smarter, not harder,” leading to lower stress levels and higher morale.

COACHING FOR PERFORMANCE FOR SUPERVISORS

Target Audience: Managers & Executives

Key Themes: Trust Building, Coaching & Mentoring, Leadership

Author: SGR

Duration: 90 Minutes & 4 Hours



Helping employees achieve their potential relies on a trust relationship. An essential strategy for building trust is knowing when and how to utilize the differing skill sets of coaching, mentoring, and supervisory counseling. Coaching for Performance for Supervisors helps participants understand the difference in these three strategies and how to best utilize each of them to help their teams achieve maximum potential.

EMPLOYMENT LAW & SUPERVISORY PRACTICES

Target Audience: Supervisors

Key Themes: Compliance

Author: SGR

Duration: 90 Minutes & 4 Hours



Today, more than ever, it is important for supervisors to understand the nuances of multiple employment laws in order to reduce liability and perform their jobs more effectively. Employment Law and Supervisory Practices increases supervisors’ awareness of employment laws and emphasizes supervisors’ responsibility to comply with laws at the leadership level. This class provides participants with synopses of key employment laws, guidelines for protecting themselves and the organization from liability, and employee counseling timelines and techniques.

HIRING THE RIGHT PEOPLE

Target Audience: Supervisors

Key Themes: Process Improvement

Author: SGR

Duration: 90 Minutes & 4 Hours



Have you ever interviewed a candidate for a position and thought they were perfect for the job only to regret your decision several months later? While not always the case, the culprit is often traditional interview questions and techniques that only provide a partial glimpse into a candidate’s skills and behaviors. Hiring the Right People asserts that the greatest indicator of future performance is past performance in a similar situation. This class teaches participants how to interview in a way that yields a much more accurate overview of a candidate’s performance potential by utilizing techniques that are easy to learn and fun to implement.

LEADING TEAMS

Target Audience: Supervisors

Key Themes: Leadership, Team Building

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Supervisory Leadership

An effective team is one that achieves a high level of performance and member satisfaction. They must have a climate of openness and trust, a clear purpose, specific roles and work assignments, and an effective system of conflict resolution. Leading Teams teaches participants the dynamics of leading a team, the characteristics of an effective team, and the different team player styles that may make up a team. This class includes a self-assessment to identify individual style, team building techniques, and case studies that apply the principles of team leadership.

MANAGING CHANGE

Target Audience: Supervisors

Key Themes: Process Improvement

Author: SGR

Duration: 90 Minutes & 4 Hours



Supervisory Leadership

For any change initiative to be effective, the change process must be aggressively managed. Managing Change instructs supervisors in the essential elements of change, including strategy, execution, and the all-important human element. This class offers participants an interactive approach to understanding the “dynamics” of small and organization-wide changes, great and small. In addition, participants gain a heightened awareness into their own processes of adapting to fundamental change, while acquiring tools in understanding and guiding others through change.

**THE TRUE HEROES OF THE NEW
MILLENNIUM WILL BE SERVANT
LEADERS, QUIETLY WORKING OUT OF THE
SPOTLIGHT TO TRANSFORM OUR WORLD.**

Ann McGee-Cooper

PROFESSIONAL ETHICS

Target Audience: All Employees

Key Themes: Compliance, Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 4 Hours



Supervisory Leadership

Local government employees should be above reproach in adhering to ethical standards and codes. Professional Ethics discusses current business ethics, identifies areas of risk, and reviews leaders' accountability for setting an ethical standard and holding both themselves and others accountable to that standard. This class includes group discussions about ethical dilemmas, guidelines for deciding what is ethical and not ethical in a local government context, and application of the six pillars of character.

SUPERVISORY COACHING

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will focus on ways to partner with employees to share a vision of personal growth and will explore the options available to equip and empower employees toward that vision. While feedback helps the employee make quick changes with immediate application, coaching involves long term goals such as skill and leadership development.

SUPERVISORY DELEGATION

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will focus on delegation as a way of developing employees to do your job. They will be challenged to push work down and will discover the idea of work "growing" as it moves down—that what is small to you is big to them. Participants will also learn to say the right things when delegating.

SUPERVISORY FEEDBACK

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will focus on defining effective feedback, both in terms of giving and receiving it, as well as building scripts and applying their knowledge to real-life managerial situations.

SUPERVISORY HIRING PRACTICES

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will prioritize hiring outcomes, explore four guideposts for effective hiring, and will learn to plan for the hiring process. As a result, they will be better prepared to screen candidates for both job and organizational fit and this will increase the odds of higher retention.

SUPERVISORY PRACTICES

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 4 Hours



Supervisory Leadership

It can be very difficult to make the transition from peer to supervisor and to understand the responsibility of this new role. Supervisory Practices helps new supervisors develop their employees, encourage a climate of motivation, plan effectively, and evaluate to make sure performance standards are met. Participants learn the four major roles of a supervisor and how supervision is carried out, taking into consideration the workplace environment and the shared and individual values of all employees.

SUPERVISORY RAPPORT

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will focus on building rapport with employees. They will discover how to use weekly one-on-one meetings to build rapport and boost productivity among employees.

SUPERVISORY SERVANT LEADERSHIP CONSIDERATIONS

Target Audience: Supervisors

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Supervisory Leadership

Participants will focus on connecting Supervisory Competencies to Servant Leadership Principles, Characteristics, and Legal Expectations.

CUSTOMER SERVICE

CONFLICT RESOLUTION

Target Audience: Supervisors

Key Themes: Communication, Trust Building

Author: SGR

Duration: 90 Minutes & 4 Hours



Customer Service

Conflict, strife, and opposing points of view are part of the workplace and part of life; this cannot be changed. However, employees can change the way they react and manage conflict when it occurs. Conflict Resolution helps employees discover practical, proven alternatives that give them skills to not only deal with difficult and frustrating situations, but to learn from them, thus creating a more productive and less stressful work environment. This class instructs participants in the sources and benefits of conflict, as well as in individual conflict styles.

CUSTOMER SERVICE COMMUNICATIONS

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Using an active learning challenge, employees will identify the responsibilities associated with sending, receiving, and following through on information. Participants will also recognize the elements of an effective communication cycle. Along the way, they will discuss how customer service communications can honor the eight customer service values.

CUSTOMER SERVICE FOR DIVERSE GENERATIONS

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Participants will become familiar with characteristics and experiences of The Boomers, The X-ers and The Millennials. They will consider how each generation prioritizes customer service values and will discuss how to meet those expectations.

CUSTOMER SERVICE FOR VARIOUS PERSONALITIES

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Participants will become familiar with four personality styles based on two spectra. They will consider how each personality type prioritizes customer service values and will discuss how to meet those expectations. These values include being Compassionate, Competent, Careful, Confident, Courteous, Calm, Quick, and Creative.

CUSTOMER SERVICE IN TIMES OF CONFLICT

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Participants will discover and apply helpful approaches to customers during times of conflict. Participants will acknowledge the importance and the challenge of focused attention. They will learn how to bypass unnecessary conflict and move quickly to meet the needs of the customer while honoring the eight customer service values.

CUSTOMER SERVICE STRATEGIES

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Participants will learn the importance of impressions and will then identify and explore strategies that will leave the customer with a great impression of the employee and the organization. Three key principles, presented as the E.Y.E. acronym, will be discovered and applied: Eager, Yielding, and Efficient.

CUSTOMER SERVICE VALUES

Target Audience: All Employees

Key Themes: Customer Service, Professional Development, Communication, Citizen Engagement

Author: SGR

Duration: 90 Minutes & 2 Hours



Customer Service

Participants will consider eight customer service values. They will explore the importance of being Compassionate, Competent, Careful, Confident, Courteous, Calm, Quick, and Creative. Based on this knowledge, employees will compile a list of behaviors that either support or undermine each value.

THE BASICS OF EXTRAORDINARY CUSTOMER SERVICE

Target Audience: All Employees

Key Themes: Customer Service

Author: SGR

Duration: 2 & 4 Hours



Customer Service

As the pressure increases to keep citizens happy and local business growing and thriving, it is more important than ever that local government employees know how to deliver customer service at the highest level. The Basics of Extraordinary Customer Service is designed to give the participants a broad overview of customer service and addresses dealing with both internal and external customers. This class instructs participants on topics including making great first impressions, professional phone etiquette, using email professionally, being respectful and responsive to customers' needs, and interacting with difficult customers.

LEARNING THE LANGUAGE OF MULTIPLE GENERATIONS

Target Audience: All Employees

Key Themes: Customer Service, Diversity

Author: SGR

Duration: 4 Hours



Customer Service

Now, more than any time in history, different generations with diverse outlooks are being asked to work together. Learning the Language of Multiple Generations helps employees understand the confusing differences between generations. In this class, participants overcome generational misconceptions and employ effective techniques for communicating with people of all ages, whether citizens or co-workers.

TIME MANAGEMENT

Target Audience: All Employees

Key Themes: Organizational Culture, Team Building

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Customer Service

Even with cell phones, computers, and Wi-Fi Internet access at their disposal, employees never seem to have enough time to complete important tasks, as well as urgent ones. This can lead to frustration and can directly affect relationships with internal and external customers. Time Management teaches employees to put first things first and implement organizational and time-saving strategies. It is easy to try to condense time management into a series of to-do lists, or tips, but effective time management is much more than that. This class is based on emotional intelligence principles, taking the participant through a much broader concept of time management than traditional approaches.

UNDERSTANDING DIFFERENT PERSONALITY STYLES

Target Audience: All Employees

Key Themes: Customer Service, Team Building

Author: SGR

Duration: 4 Hours



Relational Leadership requires that employees understand and work effectively with coworkers and customers. Understanding Different Personality Styles utilizes the DiSC® Classic personality profile assessment, equipping employees with the tools to identify and effectively deal with different personalities. Often a customer presents his/her primary temperament style within the first minute of conversation, allowing the customer service representative to frame his/her responses accordingly. This class instructs participants in understanding their own temperament styles, as well as identifying the prominent styles in others, so that they can respond to different situations effectively and efficiently. This is the foundational class for all SGR customer service classes. This class requires the additional purchase of DiSC Assessments per participant.

IF YOU WANT TO LIFT YOURSELF UP, LIFT UP SOMEONE ELSE.

Booker Washington

HUMAN RELATIONS

ANGER AND STRESS MANAGEMENT

Target Audience: All Employees

Key Themes: Personal Development

Author: SGR

Duration: 90 Minutes & 4 Hours



Human Relations

With the pace of life so fast, it seems as if anger and stress can control our lives. It has been estimated that more than half of all doctor visits are due to anger or stress-related illnesses. When we do not have a healthy mechanism to deal with the frustrations in our lives, it can lead to serious health problems. If we take the time for purposeful and constructive action, the path that we take to deal with our anger and stress can actually be a positive one. Anger and Stress Management helps participants communicate anger in healthy ways and implement effective stress management techniques.

BUILDING A RESPECTFUL WORKPLACE

Target Audience: All Employees

Key Themes: Organizational Culture, Team Building

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Human Relations

Respect is the glue that holds every successful team together. Without a culture of respect organizations and teams will spiral into burnout, resentment, and high turnover rates. Learn the secrets to making a culture respectful and how to address disrespect without ruining relationships.

EMBRACING DIVERSITY IN THE WORKPLACE

Target Audience: All Employees

Key Themes: Diversity, Organizational Culture, Team Building

Author: SGR

Duration: 90 Minutes & 4 Hours



Human Relations

The U.S. workplace is more diverse than ever before. Diversity brings many benefits, but it also creates a responsibility for supervisors and employees to learn how to nurture and encourage healthy and vibrant interactions and teamwork in such a diverse environment. Embracing Diversity in the Workplace trains participants how to create a productive, synergistic environment.

ETHICS: THE HEART OF PUBLIC SERVICE

Target Audience: All Employees

Key Themes: Professional Development, Personal Development

Author: SGR

Duration: 90 Minutes & 2 Hours



Human Relations

Ethical behavior is the foundation of a successful organization. Ethics: The Heart of Public Service is an ethics overview that can be used for new employee orientation and an ethics refresher for tenured public sector employees. In this class, participants review the basic rules of ethical conduct in the public sector and learn how to utilize the HEART Ethical Decision Making Process®. The class also includes many practical applications and several worksheets, including Unethical Behaviors Public Sector Employees Should Avoid.

PREVENTING SEXUAL HARASSMENT

Target Audience: All Employees

Key Themes: Compliance

Author: SGR

Duration: 90 Minutes & 2 Hours



Human Relations

Sexual harassment and discrimination in the workplace are issues that cannot be ignored. Not only is there a considerable amount of liability for an organization, but there can be personal liability for a public employee as well. Preventing Sexual Harassment provides a comprehensive overview of sexual harassment prevention for public sector employees and includes a test to recognize harassment, principles to create a safe environment and mitigate risk, and discussion of actual workplace scenarios. Preventing Sexual Harassment for Supervisors uses scenarios and challenges that address the supervisory responsibilities regarding the prevention of sexual harassment in the workplace. Participants will learn how to assess a situation quickly and wisely, create an environment that upholds the standards that allow employees to work in a safe place.

PREVENTING WORKPLACE HARASSMENT

Target Audience: All Employees

Key Themes: Compliance

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Human Relations

Harassment comes in many different forms. Some forms are overt, some are more subtle. In this class we will discuss the various forms of harassment and what practical steps can be taken to prevent them. Preventing Workplace Harassment instructs participants in creating a place of mutual respect for all employees. This class educates employees at all levels of responsibility on what the law says about sexual and other types of harassment and what constitutes harassment. It also helps define what is and is not appropriate personal behavior in a variety of specific situations and circumstances. You will leave this class with a keen awareness and concrete steps for addressing and preventing harassment in all its forms.

PROFESSIONAL COMPETENCY

THE ART OF PLANNING AHEAD

Target Audience: All Employees

Key Themes: Personal Development

Author: SGR

Duration: 2 Hours & 4 Hours

The Art of Planning Ahead encourages participants to think one step ahead. Building on this foundation of strategic thinking, participants discover skills that can improve both communication and time management in the workplace.



Professional Competency

BUSINESS WRITING SKILLS

Target Audience: All Employees

Key Themes: Professional Development

Author: SGR

Duration: 2 Hours & 4 Hours

Business Writing Skills teaches participants to write clearly, concisely, and appropriately in a business context. This class is designed for those who prepare written presentations, letters, memos and emails and want to enhance their writing skills. The class includes grammar basics, exercises to enhance sentence structure, and overall improvement of written communication so that participants can convey their messages professionally.



Professional Competency

EFFECTIVE LISTENING SKILLS

Target Audience: All Employees

Key Themes: Communication, Customer Service

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours

Listening is the foundation of all leadership. Most people are taught how to speak, few ever really learn how to listen. Effective Listening Skills instructs participants in the art of active listening. Active listening is a difficult skill to learn, but the payoff can be great. Participants explore the process of listening more effectively and learn specific tools to maximize interpersonal communication. Discover here the power of listening, the doors it can open for you, and the difference it can make in building and sustaining healthy relationships with your team.



Professional Competency

THE SERVANT LEADER BELIEVES THAT 'MY SUCCESS IS YOUR SUCCESS.'

Anonymous

LEADING BY EXAMPLE

Target Audience: All Employees

Key Themes: Leadership

Author: SGR

Duration: 90 Minutes, 2 & 4 Hours



Professional Competency

As employees move into leadership roles, the example they set becomes increasingly important. Leading by Example challenges participants to acknowledge both the existence of influence and the power that it wields. This class explores the concepts of leadership and helps the participant recognize leadership opportunities in the workplace.

TELEPHONE SKILLS TRAINING FOR LOCAL GOVERNMENT EMPLOYEES

Target Audience: All Employees

Key Themes: Compliance, Technical Development, Communication

Author: SGR

Duration: 2 & 4 Hours



Professional Competency

Statistics have shown that 55% of the communication process involves body language. This means that we lose over 50% of our ability to communicate when on the telephone. If good communication is the key to getting the job done right, then learning effective communication strategies on the telephone is crucial to any organization's ongoing success. Telephone Skills Training for Local Government Employees instructs participants in basic phone etiquette, phone manners that make a good business impression, the correct way to answer and speak on the phone, how to deal with resistance and disgruntled callers, and much more. If you make or receive even a handful of phone calls each day, this training initiative will continue paying dividends for years to come.

WORKPLACE VIOLENCE AWARENESS FOR SUPERVISORS

Target Audience: Supervisors

Key Themes: Compliance

Author: SGR

Duration: 90 Minutes & 4 Hours



Professional Competency

Workplace Violence Awareness for Supervisors instructs participants on how to create a safe environment for your employees. As the number of workplace violence incidents continues to rise, it is increasingly important to be able to recognize threats and take preventative action. The class includes techniques to improve your ability to see warning signs and respond effectively, guidelines for documenting behavior, and group discussion of case studies involving actual workplace violence situations.

WRITTEN COMMUNICATION & OPEN RECORDS AWARENESS

Target Audience: All Employees

Key Themes: Professional Development, Communication, Citizen Engagement Related Training: Business Writing Skills

Author: SGR

Duration: 2 Hours



Professional Competency

The realities of working in local government mean that a vast majority of communication is subject to open records. Written Communication & Open Records Awareness familiarizes participants with the nature of open records requests and what is subject to such requests. This class serves as a friendly reminder that thoughtful and professional written communication (both internal and external) is fundamental to reinforcing organizational reputation and positive public perception.

4 REASONS TO INVEST IN DEVELOPING YOUR LEADERS



IMPROVE
bottom-line
financial
performance.



ATTRACT,
develop &
retain talent.



DRIVE
strategy
execution.



INCREASE
success in
navigating
change.

POLICE TRAINING

TRANSITIONING TO SERGEANT: SERVANT LEADERSHIP

Target Audience: Police Sergeants

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 2 Hours



Police Training

This class will provide the insight and resources you need to become a genuine and effective Servant Leader. Here you will learn what it means to be a Servant Leader while exploring the strengths and weaknesses of different leadership styles. This class is eligible for TCOLE credit and is taught by a TCOLE certified instructor.

TRANSITIONING TO SERGEANT: THE TENSION PT. 1

Target Audience: Police Sergeants

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 2 Hours



Police Training

There is a tension in every department, and in every individual, between focusing on responsibilities and focusing on relationships. This class emphasizes how to take care of your responsibilities, accomplish the mission, and serve with excellence without losing sight of the necessity and power of relationships. This class is eligible for TCOLE credit and is taught by a TCOLE certified instructor.

TRANSITIONING TO SERGEANT: THE TENSION PT. 2

Target Audience: Police Sergeants

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 2 Hours



Police Training

This class builds upon the previous discussion with an emphasis on the relational aspect of leadership. How do you build and sustain healthy relationships in a professional setting? What role do relationships play in you excelling at your new responsibilities? This concluding class will discuss these questions and much more. This class is eligible for TCOLE credit and is taught by a TCOLE certified instructor.

TRANSITIONING TO SERGEANT: WHAT IS YOUR WHY

Target Audience: Police Sergeants

Key Themes: Leadership, Professional Development

Author: SGR

Duration: 2 Hours



Police Training

This class is all about exploring why you tested for promotion, and what kind of leader you want to be. We will discuss the power of knowing your purpose, and how this applies to the new responsibilities and relationship dynamics that you will face. This class is eligible for TCOLE credit and is taught by a TCOLE certified instructor.

LIVE TRAINING SERIES

Many of SGR's individual events are packaged together to form an entire series. This page lists a variety of series that SGR has created and packaged together; however, SGR can work directly with your organization to create custom packages based on your needs. In addition, throughout the Live Training catalog, these suggested series are listed in each event underneath the subheader "Related Training".

COMPLIANCE SERIES

- Preventing Sexual Harassment
- Preventing Workplace Harassment
- Embracing Diversity in the Workplace
- Building a Respectful Workplace

CUSTOMER SERVICE PRACTICES SERIES

- Understanding Different Personality Styles
- The Basics of Extraordinary Customer Service
- Time Management
- Effective Interpersonal Communication
- Learning the Language of Multiple Generations
- Conflict Resolution
- Pruning Negativity

DEVELOPING YOUR TEAM

- Relating to Different Personalities
- Effective Interpersonal Communications
- Conflict Resolution
- Pruning Negativity

EVERYDAY SERVANT LEADERSHIP SERIES

- Building a Respectful Workplace
- Intro to Servant Leadership Principles
- The Basics of Extraordinary Customer Service
- Time Management
- Anger and Stress Management
- Effective Listening Skills

EXTRAORDINARY CUSTOMER SERVICE SERIES

- Customer Service Values
- Customer Service for Various Personalities
- Customer Service for Diverse Generations
- Customer Service Communications
- Customer Service in Times of Conflict
- Customer Service Strategies

FOUNDATIONS OF SUCCESSFUL WORK SERIES

- Leading by Example
- Effective Listening Skills
- The Art of Planning Ahead
- Building a Respectful Workplace

LEAD WORKER SERIES

- Transitioning from Peer to Team Leader
- Leading by Example
- Effective Listening Skills
- Building a Respectful Workplace
- Time Management
- Ethics: the Heart of Public Service

NOW THAT YOU ARE A SUPERVISOR SERIES

- Preventing Sexual Harassment for Supervisors
- Workplace Violence Awareness for Supervisors
- Effective Interpersonal Communication
- Coaching for Performance for Supervisors
- Employment Law and Supervisory Practices
- Professional Ethics

APPENDIX A.1
Pricing for TXShare Cooperative Purchase Program Participants

Proposal Pricing

Service Category #1: Executive Search & Recruitment Services

Full Service Executive Recruitment

Fixed Fee:

- Public safety positions and positions that do report to a governing body: \$25,919.00
- Non-public safety positions and positions that do not report to a governing body: \$24,949.00

OR

Percentage Fee: Equivalent to 30% of the first-year salary of the candidate placed by SGR, with a minimum fee of \$24,000.

Optional Add-Ons:*

- Stakeholder Survey: \$1,531.00

Fees for additional requested services over and above the included quantity:*

- Online Interviews: \$256.00 per candidate
- Comprehensive Media Reports: \$766.00 per candidate
- Background Investigation Reports: \$511.00 per candidate
- Reference Checks: \$256.00 per candidate
- DiSC® Assessments: \$179.00 per candidate
- Recruiter travel and onsite time: \$1,021.00 per day

Not Included in Fixed Fee:*

- Production and delivery of briefing materials, as requested: Billed back at actual cost
- Ad placements: Billed back at actual cost
- Recruiter Travel Costs:
 - Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner.
 - Mileage will be reimbursed at the current IRS rate.
 - All other travel-related expenses are billed back at actual cost with no markup for overhead.

**A Full Service Executive Recruitment must be purchased to qualify for the listed prices.*



4/25/24 by SGR

Limited Scope Recruitment

Fixed Fee: \$14,184.00

Limited scope recruitments are offered for non-public safety positions and positions that do not report to a governing body.

Optional Add-Ons:*

- Stakeholder Survey: \$1,531.00
- Online Interviews: \$256.00 per candidate
- Comprehensive Media Reports: \$1,276.00 per candidate
- Background Investigation Reports: \$511.00 per candidate
- Reference Checks: \$256.00 per candidate
- DiSC® Assessments: \$179.00 per candidate
- Recruiter Travel, if travel is deemed necessary:
 - \$256.00 per hour, plus \$1,021.00 per day.
 - Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner.
 - Mileage will be reimbursed at the current IRS rate.
 - All other travel-related expenses are billed back at actual cost with no markup for overhead.

Not Included in Fixed Fee:*

- Production and delivery of briefing materials, as requested: Billed back at actual cost
- Ad placements: Billed back at actual cost

**A Limited Scope Recruitment must be purchased to qualify for the listed prices.*

Service Category #3: Succession Planning

Next Generation Leadership Program

Program Fee: \$30,613.00 per year



4/25/24 by SGR

Service Category #5: Interim Executives

Interim Management Services

Hourly Rate:

The hourly rate is based on the total amount the organization has in the current fiscal year budget for compensation of the position including, but not limited to:

- Base Salary
- FICA
- Worker’s Comp
- Retirement
- Medical Insurance
- Dental Insurance
- Vision Insurance
- Life Insurance
- Long/Short Term Disability Insurance
- Longevity Pay
- Deferred Compensation
- Technology Allowance (cell phone, computer, etc.)
- Car Allowance
- Professional Membership Dues
- Any Other Provided Benefit

(Example: Salary + All Benefits ÷ 2080 hours = Hourly Rate)

Hourly rates are subject to change based on market demand.

OR

Percentage Fee: Equivalent to 30% of the first-year salary of the candidate placed by SGR.

Travel:

Depending on the location of the permanent residence of the selected interim candidate, the City may need to provide a mileage/travel stipend and/or temporary lodging, such as a hotel direct billed to the City during the term of the assignment.

Optional Add-Ons:*

- Comprehensive Media Reports: \$511.00 per candidate
- Background Investigation Reports: \$409.00 per candidate

Not Included in Other Interim Management Services Fees:

- If City hires the candidate placed as Interim for a permanent position during the term of this agreement or within 12 months after the conclusion of this agreement, City will pay SGR an employment placement fee. This fee is waived if SGR conducts a full-service executive search for this position.

**Interim Management Services must be purchased to qualify for the listed prices.*



4/25/24 by SGR

Service Category #6: Other Related Consulting Services

Management Team & Strategic Foresight Workshops

Half-day:	\$3,827.00
Full-day:	\$7,143.00

Facilitator Travel Costs:

- Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner.
- Mileage will be reimbursed at the current IRS rate.
- All other travel-related expenses are billed back at actual cost with no markup for overhead.

Elected Officials Retreats

Half-day:	\$4,847.00
Full-day:	\$9,694.00

Facilitator Travel Costs:

- Meals are billed back at a per diem rate of \$15 for breakfast, \$20 for lunch, and \$30 for dinner.
- Mileage will be reimbursed at the current IRS rate.
- All other travel-related expenses are billed back at actual cost with no markup for overhead.

Live Training Classes

In-Person, 2 hours:	\$2,449.00
In-Person, 4 hours:	\$3,062.00
Virtual, 90 - 120 minutes:	\$2,041.00



4/25/24 by SGR

Assessments

I Opt®

- Workshops
 - Virtual, 2.5 hours: \$2,858.00
 - In-Person, 4 hours: \$4,082.00
- Assessments
 - Individual Reports: \$179.00 per person
 - Team Reports:* \$154.00 per report

**Requires the purchase of individual reports.*

DiSC®

- Workshops
 - Virtual, 2.5 hours: \$2,858.00
 - In-Person, 4 hours: \$4,082.00
- Assessments
 - Individual Reports: \$179.00 per person

Operational Assessments

- Starting at \$11,481



4/25/24 by SGR

APPENDIX A.2
Service Area Designation Forms

EXHIBIT 3
SERVICE DESIGNATION AREAS

Texas Service Area Designation or Identification			
Proposing Firm Name:	Strategic Government Resources, Inc.		
Notes:	Indicate in the appropriate box whether you are proposing to service the entire state of Texas		
	Will service the entire state of Texas	Will not service the entire state of Texas	
	X		
	If you are not proposing to service the entire state of Texas, designate on the form below the regions that you are proposing to provide goods and/or services to. By designating a region or regions, you are certifying that you are willing and able to provide the proposed goods and services.		
Item	Region	Metropolitan Statistical Areas	Designated Service Area
1.	North Central Texas	16 counties in the Dallas-Fort Worth Metropolitan area	
2.	High Plains	Amarillo Lubbock	
3.	Northwest	Abilene Wichita Falls	
4.	Upper East	Longview Texarkana, TX-AR Metro Area Tyler	
5.	Southeast	Beaumont-Port Arthur	
6.	Gulf Coast	Houston-The Woodlands- Sugar Land	
7.	Central Texas	College Station-Bryan Killeen-Temple Waco	
8.	Capital Texas	Austin-Round Rock	
9.	Alamo	San Antonio-New Braunfels Victoria	
10.	South Texas	Brownsville-Harlingen Corpus Christi Laredo McAllen-Edinburg-Mission	
11.	West Texas	Midland Odessa San Angelo	
12.	Upper Rio Grande	El Paso	

(Exhibit 3 continued on next page)

(Exhibit 3 continued)

Nationwide Service Area Designation or Identification Form			
Proposing Firm Name:	Strategic Government Resources, Inc.		
Notes:	Indicate in the appropriate box whether you are proposing to provide service to all Fifty (50) States.		
	Will service all fifty (50) states	Will not service fifty (50) states	
	X		
	<p>If you are not proposing to service to all fifty (50) states, then designate on the form below the states that you will provide service to. By designating a state or states, you are certifying that you are willing and able to provide the proposed goods and services in those states.</p> <p>If you are only proposing to service a specific region, metropolitan statistical area (MSA), or city in a State, then indicate as such in the appropriate column box.</p>		
Item	State	Region/MSA/City (write "ALL" if proposing to service entire state)	Designated as a Service Area
1.	Alabama		
2.	Alaska		
3.	Arizona		
4.	Arkansas		
5.	California		
6.	Colorado		
7.	Connecticut		
8.	Delaware		
9.	Florida		
10.	Georgia		
11.	Hawaii		
12.	Idaho		
13.	Illinois		
14.	Indiana		
15.	Iowa		
16.	Kansas		
17.	Kentucky		
18.	Louisiana		
19.	Maine		

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20.	Maryland		
21.	Massachusetts		
22.	Michigan		
23.	Minnesota		
24.	Mississippi		
25.	Missouri		
26.	Montana		
27.	Nebraska		
28.	Nevada		
29.	New Hampshire		
30.	New Jersey		
31.	New Mexico		
32.	New York		
33.	North Carolina		
34.	North Dakota		
35.	Ohio		
36.	Oregon		
37.	Oklahoma		
38.	Pennsylvania		
39.	Rhode Island		
40.	South Carolina		
41.	South Dakota		
42.	Tennessee		
43.	Texas		
44.	Utah		
45.	Vermont		
46.	Virginia		
47.	Washington		
48.	West Virginia		
49.	Wisconsin		
50.	Wyoming		

End of Exhibit 3

**APPENDIX B
DEBARMENT CERTIFICATION**

I, Jennifer Fadden
(Name of certifying official)

being duly sworn or under penalty of perjury under the laws of the United States, certifies that neither

Strategic Government Resources,
(Name of lower tier participant)

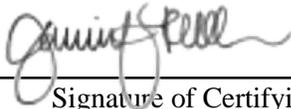
nor its principals are presently:

- debarred, suspended, proposed for debarment,
- declared ineligible,
- or voluntarily excluded from participation in this transaction by any federal department or agency

Where the above identified lower tier participant is unable to certify any of the above statements in this certification, such prospective participant shall indicate below to whom the exception applies, the initiating agency, and dates of action.

Exceptions will not necessarily result in denial of award but will be considered in determining contractor responsibility. Providing false information may result in criminal prosecution or administrative sanctions.

EXCEPTIONS:



Signature of Certifying Official
Chief Operating Officer

Title
4/24/24

Date of Certification

APPENDIX C RESTRICTIONS ON LOBBYING

Section 319 of Public Law 101-121 prohibits recipients of federal contracts, grants, and loans exceeding \$100,000 at any tier under a federal contract from using appropriated funds for lobbying the Executive or Legislative Branches of the federal government in connection with a specific contract, grant, or loan. Section 319 also requires each person who requests or receives a federal contract or grant in excess of \$100,000 to disclose lobbying.

No appropriated funds may be expended by the recipient of a federal contract, loan, or cooperative agreement to pay any person for influencing or attempting to influence an officer or employee of any federal executive department or agency as well as any independent regulatory commission or government corporation, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with any of the following covered federal actions: the awarding of any federal contract, the making of any federal grant, the making of any federal loan the entering into of any cooperative agreement and the extension, continuation, renewal, amendment, or modification of any federal contract, grant, loan, or cooperative agreement.

As a recipient of a federal grant exceeding \$100,000, NCTCOG requires its subcontractors of that grant to file a certification, set forth in Appendix B.1, that neither the agency nor its employees have made, or will make, any payment prohibited by the preceding paragraph.

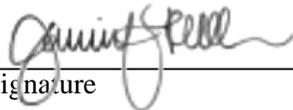
Subcontractors are also required to file with NCTCOG a disclosure form, set forth in Appendix B.2, if the subcontractor or its employees have made or have agreed to make any payment using nonappropriated funds (to include profits from any federal action), which would be prohibited if paid for with appropriated funds.

**LOBBYING CERTIFICATION
FOR CONTRACTS, GRANTS, LOANS, AND COOPERATIVE AGREEMENTS**

The undersigned certifies to the best of his or her knowledge and belief, that:

- (1) No federal appropriated funds have been paid or will be paid by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of any federal agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with the awarding of any federal contract, the making of any federal grant, the making of any federal loan, the entering into of any cooperative agreement, and the extension continuation, renewal amendment, or modification of any federal contract, grant, loan, or cooperative agreement.
- (2) If any funds other than federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this federal contract, grant, loan, or cooperative agreement, the undersigned shall complete and submit Standard Form - LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions.
- (3) The undersigned shall require that the language of this certification be included in the award documents for all subawards at all tiers (including subcontracts, subgrants, and contracts under grants, loans, and cooperative agreements) and that all subrecipients shall certify and disclose accordingly.

This certification is a material representation of fact upon which reliance was placed when this transaction was made or entered into. Submission of this certification is a prerequisite for making or entering into this transaction imposed by Section 1352, Title 31, US Code. Any person who fails to file the required certification shall be subject to a civil penalty of not less than \$10,000 and not more than \$100,000 for each such failure.



Signature

Chief Operating Officer

Title

Strategic Government Resources

Agency

4/24/24

Date

**APPENDIX D
ATTESTATION OF CONTRACTS NULLIFYING ACTIVITY**

The following provisions are mandated by Federal and/or State of Texas law. Failure to certify to the following will result in disqualification of consideration for contract. Entities or agencies that are not able to comply with the following will be ineligible for consideration of contract award.

D-1: PROHIBITED TELECOMMUNICATIONS AND VIDEO SURVEILLANCE SERVICES OR EQUIPMENT CERTIFICATION

This Contract is subject to the Public Law 115-232, Section 889, and 2 Code of Federal Regulations (CFR) Part 200, including §200.216 and §200.471, for prohibition on certain telecommunications and video surveillance or equipment.

Public Law 115-232, Section 889, identifies that restricted telecommunications and video surveillance equipment or services (e.g. phones, internet, video surveillance, cloud servers) include the following:

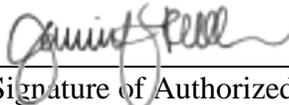
- A) Telecommunications equipment that is produced by Huawei Technologies Company or ZTE Corporation (or any subsidiary or affiliates of such entities).
- B) Video surveillance and telecommunications equipment produced by Hytera Communications Corporations, Hangzhou Hikvision Digital Technology Company, or Dahua Technology Company (or any subsidiary or affiliates of such entities).
- C) Telecommunications or video surveillance services used by such entities or using such equipment.
- D) Telecommunications or video surveillance equipment or services produced or provided by an entity that the Secretary of Defense, Director of the National Intelligence, or the Director of the Federal Bureau of Investigation reasonably believes to be an entity owned or controlled by the government of a covered foreign country.

The entity identified below, through its authorized representative, hereby certifies that no funds under this Contract will be obligated or expended to procure or obtain telecommunication or video surveillance services or equipment or systems that use covered telecommunications equipment or services as a substantial or essential component of any system, or as a critical technology as part of any system prohibited by 2 CFR §200.216 and §200.471, or applicable provisions in Public Law 115-232 Section 889.

The Contractor or Subrecipient hereby certifies that it does comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

Strategic Government Resources

Name of Organization/Contractor



4/24/24

Signature of Authorized Representative

Date

Jennifer Fadden, Chief Operating Officer

Printed/Typed Name and Title of Authorized Representative

Continued on Next Page

-OR-

- The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of 2 CFR §200.216 and §200.471, or applicable regulations in Public Law 115-232 Section 889.

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date

D-2: DISCRIMINATION AGAINST FIREARMS ENTITIES OR FIREARMS TRADE ASSOCIATIONS

This contract is subject to the Texas Local Government Code chapter 2274, Subtitle F, Title 10, prohibiting contracts with companies who discriminate against firearm and ammunition industries.

TLGC chapter 2274, Subtitle F, Title 10, identifies that “discrimination against a firearm entity or firearm trade association” includes the following:

- A) means, with respect to the entity or association, to:
 - I. refuse to engage in the trade of any goods or services with the entity or association based solely on its status as a firearm entity or firearm trade association; and
 - II. refrain from continuing an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association; or
 - III. terminate an existing business relationship with the entity or association based solely on its status as a firearm entity or firearm trade association.

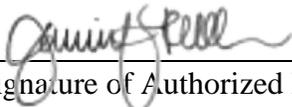
- B) An exception to this provision excludes the following:
 - I. contracts with a sole-source provider; or
 - II. the government entity does not receive bids from companies who can provide written verification.

The entity identified below, through its authorized representative, hereby certifies that they have no practice, policy, guidance, or directive that discriminates against a firearm entity or firearm trade association; and that they will not discriminate during the term of the contract against a firearm entity or firearm trade association as prohibited by Chapter 2274, Subtitle F, Title 10 of the Texas Local Government Code.

The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 2274, Subtitle F, Title 10.

Strategic Government Resources

Name of Organization/Contractor



Signature of Authorized Representative

Jennifer Fadden, Chief Operating Officer

Printed/Typed Name and Title of Authorized Representative

4/24/24

Date

Continued on Next Page

-OR-

The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 2274, Subtitle F, Title 10.

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date

D-3: BOYCOTTING OF CERTAIN ENERGY COMPANIES

This contract is subject to the Texas Local Government Code chapter 809, Subtitle A, Title 8, prohibiting contracts with companies who boycott certain energy companies.

TLGC chapter Code chapter 809, Subtitle A, Title 8, identifies that “boycott energy company” means, without an ordinary business purpose, refusing to deal with, terminating business activities with, or otherwise taking any action that is intended to penalize, inflict economic harm on, or limit commercial relations with a company because the company:

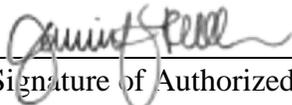
- I. engages in the exploration, production, utilization, transportation, sale, or manufacturing of fossil fuel-based energy and does not commit or pledge to meet environmental standards beyond applicable federal and state law; and
- II. does business with a company described by paragraph (I).

The entity identified below, through its authorized representative, hereby certifies that they do not boycott energy companies, and that they will not boycott energy companies during the term of the contract as prohibited by Chapter 809, Subtitle A, Title 8 of the Texas Local Government Code.

The Contractor or Subrecipient hereby certifies that it does comply with the requirements of Chapter 809, Subtitle A, Title 8.

Strategic Government Resources

Name of Organization/Contractor



Signature of Authorized Representative

Jennifer Fadden, Chief Operating Officer

Printed/Typed Name and Title of Authorized Representative

4/24/24

Date

-OR-

The Contractor or Subrecipient hereby certifies that it cannot comply with the requirements of Chapter 809, Subtitle A, Title 8.

Name of Organization/Contractor

Signature of Authorized Representative

Printed/Typed Name and Title of Authorized Representative

Date