

M E M O R A N D U M

TO: Board of Trustees

THROUGH: Mike Bandelin
Interim General Manager

FROM: Erin Feore, Director of Human Resources

SUBJECT: Discussion and possible action to consider the following applicants, Mitchell Dion, Robert Field and Beverli Marshall for the vacant IVGID General Manager position, to include interview of candidates, possible selection of the General Manager position and/or a possible alternative choice, and possible direction to staff to proceed with negotiations of employment contract.

RELATED STRATEGIC PLAN INITIATIVE(S): Long Range Principal #4 – Workforce Comply with applicable Federal, State, County and governmental regulations and all District policies

RELATED DISTRICT POLICY, PRACTICES, RESOLUTIONS or ORDINANCES: N/A

DATE: January 24, 2024

I. RECOMMENDATION

Following the interview process with the General Manager candidates, the Board makes a motion to:

1. Designate selected candidate and, possibly, designate second choice; and
2. Direct staff and/or legal counsel to complete the negotiation of the employment contract for newly hired General Manager.

II. BACKGROUND

On August 30, 2023, the Board of Trustees selected the executive search firm of Bob Hall and Associates and authorized the Director of Human Resources and Interim General Manager to engage in services with said agency.

On January 9, 2024, Bob Hall and Associates proposed four candidates for District Board of Trustees' consideration for the position of General Manager. Prior to the date of this memo, one of the candidates rescinded their interest for personal reasons. A panel assessment of these proposed candidates was conducted on January 9, 2024. The panel consisted of the Interim General Manager, Mike Bandelin; Interim Director of Finance, Bobby Magee; Director of Human Resources, Erin Feore and Talent Acquisition Specialist, Lisa Hoopes.

The following candidates were selected to be considered by the Board of Trustees for hire:

Mitchell Dion
Robert Field
Beverli Marshall

IVGD staff recommends the following procedure for conducting candidate interviews:

Candidate resumes, cover letters and supplemental information (if provided) are included in this Board packet for review. Following a brief introductory presentation (not to exceed five minutes) in which each candidate will highlight their experience and background, the Trustees will each take turns (as coordinated by the Board Chair) to ask questions of each candidates. It is recommended that candidate interviews do not exceed 50 minutes.

Following the last candidate's interview, the Board Chair may allow for public comment.

After public comment, the Board will proceed to nominate their top candidate for the General Manager position. The District Clerk will read aloud each Trustee's selection to identify the top two candidates.

- If there is a unanimous selection, the Board Chair will proceed as noted below.
- If there is not a unanimous selection, the Board Chair will call for a second vote in which case all Trustees will be directed to select their top candidate from the top two identified candidates from the previous nomination round.
- The District Clerk will again read aloud each Trustee's selection to identify the top candidate.

The Board Chair will ask for a motion to select the top candidate for the position. Once the motion is passed and the top candidate is formally announced, the Board Chair may provide direction to IVGID staff and/or legal counsel to

negotiate the new employment contract for the new General Manager and the Director of Human Resources will coordinate with appropriate staff to bring back for future consideration the proposed contract for review and possible consideration.

III. BID RESULTS

Not Applicable

IV. ALTERNATIVES

The Board may choose to not select any of the proposed candidates and give further direction to IVGID staff regarding the General Manager recruitment process:

- Direct staff to review and select for proposal a new Executive Search Firm; or
- Direct staff to engage with previously identified second choice Executive Search Firm (Koff and Associates) for services not to exceed \$50,000*; or
- Direct staff to discontinue search process until further notice.

*Rate noted is previously approved spending authority maximum for professional services with Bob Hall and Associates. Additionally, any proposed contract would require further Board approval; as such, the IVGID staff would return to the Board for direct approval before formally engaging with selected executive search firm.

V. ATTACHMENTS

1. Candidate Resumes
2. General Manager Job Description

VI. DECISION POINTS NEEDED FROM THE BOARD OF TRUSTEES

Selection of top candidate for the General Manager position. Direction to proceed to employment contract negotiations.

December 27, 2023

Joe Gorton
Bob Hall & Associates
joe@bobhallandassociates.com

Re: General Manager, Incline Village General Improvement District, NV

Dear Mr. Gorton & Selection Committee,

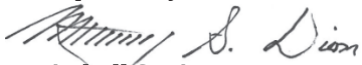
I am enthusiastic to be considered for the position of General Manager, Incline Village GID. Formal education combined with exceptional experience managing complex agencies, I am a proficient and industrious executive with business acumen, political savvy, vision and proven leadership in both private and public sectors. I offer diversified expertise and ability to deliver award winning results combined with the fluency to navigate regulatory processes and nuanced relationships requisite for success.

Known for principled and forward leaning leadership, innovative and adaptive approaches are my hallmarks. A resilient professional, my career has taken unusual twists providing matchless opportunity. Seeking difficult assignments expanded my proficiency and created a trove of know-how to bring order in the asymmetrical spectrum of contemporary issues. Also reinforcing my commitment to developing employees as the foundation for a productive and successful agency. I thrive working challenging and complex issues and offer a proven record as a fiscally responsible executive. Integrating vision, resource planning and responsiveness in a collaborative environment is a niche that I am well suited, moreover, I have the pragmatic skills, leadership traits and communication tools to enhance district operations and attentiveness to the community interests.

My experiences encompass working throughout the West; building teams, partnerships and consensus while emerging as a leader on complex public policy issues. Driving sustainable solutions for resource stewardship, I bring a unique perspective formed by keen relationships with state and federal agencies, regulators, and direct experience within legislative offices. Deep technical skills in water resources, operations and capital program delivery, I am experienced integrating a variety of resources including hydroelectric and recreation programs. In addition, I embrace active community engagement and will bring a customer service ethos with extensive experience working with diverse stakeholders to successfully align multiple perspectives and competing interests.

I appreciate your consideration of my application. Incline Village General Improvement District is an exceptional opportunity, I will bring the vision, ability, energy, and commitment to lead change and deliver success in responsive and high-quality services.

Respectfully,



Mitchell S. Dion



Mitchell S. Dion

Innovative, politically astute, and agile executive with extensive leadership experience embracing fiscally sound, measured and responsible solutions.

Vision & Innovation
Optimize Business and Engineering Systems
Fiscal Acumen

Legislative & Strategic Affairs
Employee Relations & Development
State and Regional Leadership

General Manager, Kingsbury General Improvement District

8/21 to cur

Led small and highly responsive agency providing water, wastewater, roads, snow removal and drainage services navigating the complexity of the Tahoe Basin. Provide mentorship and employee development for district.

- Organized and led coalition of GIDs for representation and mutual support in County and State Issues
- Secured \$2.5 million grant for consolidation of small failing system
- Implemented capital planning process for water, wastewater and stormwater while driving robust waterline and road improvement program
- Revised business and maintenance management process
- Led revisions to the development review and approval process
- Successfully led labor negotiations consistent with Board priorities

Assistant General Manager, Pasadena Water & Power, CA

11/17 to 8/21

Oversee complex utility operations and services for City. Provide technical and administrative direction to executives and managers. Coordinate legal, risk management and regulatory issues. Represent City on numerous local, regional and state wide boards and stakeholder groups. Conduct analysis and provide recommendations to City Council on legislative and policy issues. *Awarded Champion of Change by Outward Bound Adventures for inclusion and diversity in the Outdoors.*

- Developed watershed stewardship program academy for High School students in disadvantaged community
- Served on labor negotiations team, recommending and meeting policy objectives of City Council
- Led realignment of management team using analytical decision tools to improve service delivery and accountability
- Mapped and implemented relationship building with diverse public stakeholder groups to embrace resources plan
- Restructured CIP delivery improving results and reduced costs provided focus on resiliency and long term reliability
- Spearheaded regional groundwater replenishment program and negotiated regional water transfers

Consultant (Sacramento and San Diego)

06/14 to 11/17

Adjunct senior executive providing technical veracity and applying quantification decision tools for a variety of service areas. Supervising teams, provided technical program management, administrative support and development services for communities up to 300,000 people. Manage CIP, special projects and diverse portfolio of water and energy assets, oversee projects and analysis of legislative and planning proposals while enhancing strategic affairs. Conduct performance audit and cost of service study to address rates. Participate and led regional teams addressing; SGMA, discharge permitting, conjunctive use, aquifer storage and recovery, solid waste and energy management.

- Drafted Voluntary Settlement provisions used by Sacramento Area Agencies
- Introduced Regional Groundwater Bank and provided financial framework to implement groundwater transfer and conjunctive use to enhance resiliency
- Enhanced local relationships and managed dialogue de-conflicting agencies
- Transformed masterplan using analytics and risk based decision tools for business case decisions on asset management
- Saved 15% on overhead, focused on design and enhanced delivery of the CIP with award winning results
- Integrated technical services, AMI, CMMS and GIS for improved customer service and resource management
- Initiated policy vision enabling adaptive practices for climate, regulatory response and sustainability in masterplan

General Manager, Calaveras County Water District, CA

12/12 to 06/14

Led diverse agency including all aspects of resource management; 1100 square mile service area with 13 wastewater and 10 drinking water improvement districts, three hydroelectric plants (2 FERC projects 276mw), ag water, wholesale water and recreation facilities from the crest of the Sierras to Central Valley (110 FTE).

- Successfully eliminated 10% in overhead expenses while improving efficiencies
- Initiated FERC relicense and branding strategies fostering water rights alignment for broad benefits
- Effectively pursued legislation enabling storage to facilitate water transfers
- Successfully obtained State and Federal funding for disadvantaged communities and response to disaster recovery
- Resolved lingering litigation and related compliance requirements and addressed festering labor issues
- Engaged state & federal water and land agencies providing framework of state priority for resiliency in headwaters

General Manager, Rincon del Diablo M.W.D., San Diego County, CA

03/07 to 01/13

Led Water & Recycled Water and Fire Protection District, responsible to implement the policies of the Board of Directors, provided leadership, and managed restructuring the district reducing personnel and costs. Provided technical expertise in complex utility programs, steered; Community and Professional organizations leading policy and regulatory initiatives.

- Recognized leader and innovator successfully leveraged resources for water quality, reliability and infrastructure
- Achieved over 35% offset of potable use by recycled water within 3 years
- Led innovative Strategic Planning process producing unique monitoring and communications tool
- Modernized district information systems, including, AMI deployment and Business System and Process reforms
- Enhanced the customer experience based upon Analytics Business Intelligence (ABI) and integration of GIS tools
- Award winning communications program including Rincon 24/7
- Cofounder CSU San Marcos Utility Executive Certificate Program providing post-grad education to Utility professionals

Director of Community Development (Public Works and Planning), Douglas County, NV

07/06 to 03/07*

Manage diverse department consisting of Planning, Engineering, Building Official, Roads, and Utilities Divisions providing general government and municipal services for the County. Responsible to coordinate the public services delivery and champion economic development initiatives balancing the distinctive challenges of rural Nevada while addressing services in rapidly urbanizing areas, including the Casino core and tourism for Lake Tahoe. Oversee and administer the National Flood Insurance program and address flood map impacts to the community. * position eliminated in recession

- Oversaw seven independent water utilities, two wastewater utilities and a regional wastewater plant with recycled water with unique challenges of managing utilities within the Tahoe Basin including California Lahontan RWQCB.
- Led multiple agencies (including tribes) in regional cooperation on water, stormwater, solid waste and land-use
- Implemented a significant capital program for utilities; extensive groundwater monitoring and modeling program
- Resolved a contentious slow growth controversy with a series of community meeting and small working groups
- Raised the quality of services and the quality of development occurring in the community by fostering an environment which professional and technical staff were empowered to make decisions

General Manager/Production Director, American Water Western Region

07/03 to 08/06

Oversaw regulated and non-regulated water and wastewater facilities in several western states providing water, sewer and reclaimed water services for over 2 million people through several of the company's largest and most sophisticated treatment facilities. Develop, implement and monitor performance matrices of several managers and executives (340 FTE).

- Effectively negotiated and managed O&M contracted water & wastewater services for several mid-sized and large cities; including Seattle, Phoenix, Stockton and Houston
- Optimized processes, provided guidance and policy as necessary across all functional areas to plan, organize and execute the business and operational objectives achieving fiscal goals
- Led technical assessments and develop system operations plans for treatment, distribution and collection systems
- Engaged with elected officials and public agency personnel enhancing planning and service delivery
- Elected as Chairman Sacramento Groundwater Authority and Executive Board for the Regional Water Authority
- Improved rapport with other major water agencies, pursuing collaborative enhancements to the water supply
- Addressed complex regulatory and litigation issues resulted from contaminated ground water supplies
- Successful in rate case prepared for the California Public Utility Commission requiring keen attention to detail

Deputy Director of Public Works, City of Woodland, CA

08/00 to 07/03

Managed Utilities and Public Works O&M activities for City of Woodland. Oversaw planning and implementation of Water, Wastewater, and Stormwater, as well as, Street, Fleet & Facilities, Trees and Solidwaste/recycling programs. Coordinate all aspects for the Water and Wastewater utilities.

- Led two community advisory groups; to modernize solid waste & green waste collection
- Favorably negotiated with regulatory agencies, ensuring compliance for drinking water and wastewater utilities
- Participated on RWQCB committee for Basin Plan amendments to facilitate the use of recycled water and conjunctive use of the groundwater basin
- Initiated petition of new surface water rights successfully guiding effort to become the Woodland/Davis Treatment Plant
- Modernized solid waste and green waste collection

Utility Manager, City of Lacey, WA

09/95 to 09/00

Oversaw and managed community Utilities (20,000 water/ww connections). Provided strategic planning, perform technical analysis, coordinate compliance and environmental regulation, direct project design & construction, manage public outreach & education programs, develop & recommend policy for elected officials.

- "First in nation" zero runoff ordinance for fully mitigated developments
- Developed and implemented analytical performance criteria on specific programs for water quality monitoring, wetland protection, and drinking water source development
- Distinguished recognition by the USEPA for communications and community engagement during water contamination emergency

Engineer Officer United States Marine Corps key assignments include:

Marine Corps Liaison to the State of California

Conduct analysis and communicate USMC perspective to legislature and regulatory agencies while engaging on proposed legislation, enforcement and implementation of programs, particularly Resource Planning, Water & Energy, Land use, Air Quality, Water Quality (NPDES), Watersheds, ESA, NEPA/CEQA, Transportation Planning and Affordable Housing.

- A unique portal into the State and opportunity to engage and influence officials and nongovernmental groups at all levels
- Awarded for innovative work with State Agencies and as staff member to California Defense Retention Council (BRAC)
- Generated handbook to guide communities and base planning efforts for Governor’s Office of Planning and Research
- Introduced integrated strategy for several western states to leverage versus compete for mission (retaining bases)

Director of Facilities, Marine Corps Mountain Warfare Training Center, Bridgeport CA

Managed infrastructure and services for an isolated, self-contained community. Uniquely challenged base and airfield operations: high altitude, environmentally sensitive setting near Yosemite National Park in National Forest. Developed and implemented a comprehensive environmental compliance program.

- Led Master planning process providing for the coordination with applicable Federal, State, and Local agencies
- Acquired in-depth knowledge and practical experience in California and Federal environmental regulatory programs
- Successful collaborative approach working with NGO and other stakeholder groups
- Successful within California Legislature to modify the proposed designation for the Walker River to Wild and Recreation mitigating impacts to military training and base operations
- Negotiated favorable permit conditions with Lahontan Regional Water Quality Control Board.

Deputy Director, Facilities Management Dept, Marine Corps Air Bases, Western Area, El Toro, CA

Successfully provided leadership for traditionally structured municipal Public Works organization managing over 425 personnel with operational budget of \$55M and capital program of \$350M. Oversaw the public works operations and services for these large, complex communities.

- Implemented a cutting edge private venture capital project to provide additional military housing
- Led development of a competitive bid for service functions in the Commercial Activities (A-76) program
- Managed several large environmental remediation projects and implemented a reclaimed water project for aircraft hangar deluge system and golf course irrigation

Facilities Officer, Marine Corps Base, Camp Pendleton, CA

Lead department providing routine and emergency maintenance, construction and service contracting, energy and utilities services, solid waste programs including recycling and landfill operations.

- Closed two landfill sites and addressed numerous legacy issues including methane recovery
- Initiated long term water supply negotiation resolving contested water rights with adjacent agency

Professional Development:

M.S. Systems Management- R&D, School of Engineering
University of Southern California, Los Angeles

B.A. Environment Studies, California State University
Sacramento

A.A. General Ed/Science
American River College, Sacramento

Professional level military schools:

U.S. Army; Advanced Engineer Officer Course
(M.S. Construction Management):
U.S. Marine Corps; Engineer Officer, Utility Officer Courses:
U.S. Navy; Civil Engineer Officer School;
Public Works Management, Construction Contract
Administration, Planning, Energy and Service Contract
Programs:
U.S. Navy; Environmental Law
FEMA Emergency Management Institute, Floodplain Mgmt;
NIMS

Member AWWA, APWA, CWEA, AWRA, GRA, CASA
Member Delta Nutrients State Advisory Committee
Former Board Member: San Diego County Water Authority
(Chairman Water Supply Planning Committee)
Former Board Member: North County Econ Development Council
Former Board member: Carson Area Metropolitan Planning Org.
Former Director Sacramento Regional Water Authority
Former Chairman Sacramento Groundwater Authority
Former President Council of Water Utilities, San Diego

Certification:

WA WDM 3
CA/NV Cross Connection Specialist
CA WDO 2

Volunteer:

San Juan School District, Env. Ed, Camp Winthers, Soda Springs
Sacramento Creek week
San Diego – I love a Clean San Diego Beach and Creek clean-up

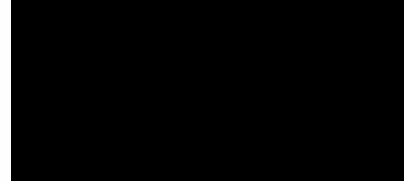
Memberships:

Active in CMUA, ACWA, and AMWA

Mitchell S. Dion

(760) 535-7137

Robert D. Field



December 27, 2023

Board of Trustees
Incline Village General Improvement District
c/o Bob Hall & Associates
Attn: Bob Hall

Subject: General Manager

To Whom It May Concern:

By this letter, I am forwarding my resume to you regarding my interest in the position of General Manager of the Incline Village General Improvement District. As you will note in reviewing my resume, I have considerable experience in numerous aspects of public agency management, many of which pertain directly to that position. In addition, my combination of private sector and public sector experience provides me with an insight into the challenges faced by, and the opportunities offered by, people and entities in both arenas.

Specifically, my experience in the public sector as an Assistant County Executive Officer and a City Manager has provided me the opportunity to successfully manage large, multidisciplinary government organizations and agencies. My appreciation for the value of partnerships and the importance of breaking down silos has grown considerably, as experience has proven time and again that no organization has a monopoly on good ideas, and that joint efforts bring a much greater likelihood of success.

As a public servant, it has always been one of my highest priorities to assemble and lead teams in a manner that makes a difference in the lives and livelihoods of residents. Community engagement is one of my strengths, and I make sure to have regular meetings with individual residents, neighborhood associations, and other community groups. One of the most important means of doing so is developing and sustaining relationships with numerous individuals and groups, both within the community and with leaders at the national, state, county, and municipal level. Part of this can be accomplished by developing meaningful plans that are embraced by stakeholders, with an emphasis on the achievable.

I spent most of my career with the County of Riverside, culminating with service as an Assistant County Executive Officer responsible for leading a large multi-disciplinary agency known as the Economic Development Agency, or EDA. At its peak EDA had over 1,600 employees and a budget of over \$1.1 billion. EDA was responsible for a multitude of services, both externally focused (serving the public in various capacities) and internally focused (serving other county departments). During the last three years of my tenure with the County of Riverside I also oversaw the operations of several independent County departments,

including the Registrar of Voters, the Department of Animal Services, the Regional Parks and Open Space District, and the Agriculture Commissioner.

Subsequent to my time with the County of Riverside I served as the City Manager of the City of San Bernardino. As many in local government circles know, San Bernardino is one of the few municipalities in California history to declare bankruptcy, which occurred in 2012. Upon assuming the seat, it quickly became clear that the city's employees needed to be made proud of the work they do, and that they needed to be provided with supportive leadership that would bring everyone together to move the city forward. Throughout my tenure I created and filled several key positions, many of which either did not exist before or had not been filled in years. The new team contributed the richness of their varied backgrounds, and their experience enhance the team, making San Bernardino a place where people want to work.

Although I currently reside in Southern California, I have spent considerable time in the State of Nevada, and have relatives and long-time friends residing in many areas of the state. My family and I have long considered moving to Nevada, and I have no impediments to relocating.

Thank you for allowing me to express my interest in the position of General Manager. I look forward to the opportunity to interview so that I can more completely demonstrate my qualifications and experience.

Sincerely,

Robert D. Field

Robert D. Field

**Robert D. Field
2023**

Experience: September 2020-January 2023: City Manager, City of San Bernardino, California

Served as City Manager of the City of San Bernardino, a charter city with approximately 223,000 residents that serves as the county seat for the County of San Bernardino. The city is responsible for all municipal services aside from fire protection, which is provided by the County's Fire Protection District, and waste collection, which is provided through a franchise agreement by a private contractor.

San Bernardino is one of the few municipalities in California history to declare bankruptcy, which occurred in 2012. In order to make the City of San Bernardino a place where people want to work, numerous key positions needed to be created, lines of authority had to be reestablished, policies adopted, and a high functioning management team hired. The information listed below details work performed to reinvigorate and uplift the city--its residents, its business community, and its employees.

- Reestablished the underpinnings of sound governance and function in the City of San Bernardino, based on improved approaches to policy making and budgeting.
- Improved service levels throughout the City in various respects, including but not limited to public safety, code enforcement, street and bridge condition, park and recreation programming and facility condition, and street tree maintenance.
- Established information dissemination capacity in order to provide residents and other interested parties consistent updates on the City's projects, programs, and overall progress.
- Ensured that the City began to be viewed as business friendly in order to draw in various types of investment, such as mixed use and transit-oriented development
- Created partnerships with other entities (e.g. County of San Bernardino, non-profit organizations, faith based organizations, and other non-governmental organizations) that will help the City improve responses to homelessness.
- Reorganized various departments and divisions to improve span of control and refine departmental responsibilities; examples include:
 - Reduced the scope of responsibility of the Public Works Department
 - Created a separate Facilities Management Department
 - Enhanced and refocused the Code Enforcement Division

- Created a Purchasing Division
- Created a Risk Management Division

General

- Led the organization through the fiscal and administrative challenges associated with responding to the COVID-19 pandemic, including the reopening process.
- Managed the development and distribution of outreach materials and analysis required for the Mayor, City Council, and voters to consider increasing and extending the City's supplemental sales tax.
- Facilitated the development, adoption, and implementation a voter approved 1% sales tax enhancement. Created an associated expenditure policy and established an oversight committee.
- Initiated the development and implementation of a comprehensive administrative policy manual.
- Established partnerships with various organizations (NPOs, NGOs, other government organizations) to address issues of homelessness.
- Negotiated the funding and preparation of a comprehensive Economic Study of the City by noted economist Dr. Christopher Thornberg, Director of the Economic Forecast Center at the UCR School of Business and Founder/President of Beacon Economics.
- Initiated the process of assessing and restoring service levels and increasing staffing in key areas throughout the City.
- Introduced a City-wide Nuisance Abatement Program and increased staff levels in the Code Enforcement Division.
- Facilitated numerous City Council workshops, including a Strategic Planning Session, the General Plan/Downtown Specific Plan process, and Budget planning.
- Initiated the process for updating the General Plan, preparing a Downtown Specific Plan, and updating the Development Code.
- Revised and advanced the City's Capital Improvement Projects (CIP).
- Initiated efforts to foster and develop a regional approach to addressing permanent supportive housing for unsheltered homeless individuals.
- Commenced labor negotiations.
- Negotiated the award of \$7.5 million in grants from the San Manuel Band of Mission Indians to be used for programs, services, and staffing for homeless services, parks and community services, and animal services.
- Directed negotiations that resulted in the relocation of the annual UCR Business School Economic Forecast event for the County of San Bernardino to downtown; event formerly took place in Ontario.

New Hires

- Chief of Police
- Finance Director
- Community & Economic Development (CED) Director

- Human Resources Director
- Public Works Director
- Parks, Recreation & Community Services Director
- Information Technology Director
- Public Information Officer (PIO)
- Economic Development Manager
- Purchasing Manager
- Real Property Manager
- Risk Manager
- Senior Management Analysts
- Administrative Analysts
- Code Enforcement Manager
- Code Enforcement Officers
- Miscellaneous CED Positions (Ongoing)
- Miscellaneous Public Works Positions (Ongoing)

Policies

- Introduced new Policy Manual (not previously established)
- Developed Reimbursement and Travel Policy
- Developed Purchasing Policy
- Developed Procurement Card Policy
- Developed Fiscal Management Policy

Budget

- Prepared and presented FY 20/21 Mid-Year Budget Report (approved 2/17/21)
- Prepared and presented FY 21/22 Budget (approved 6/2/21)
- Prepared and presented the City's first-ever multi-year budget, for FY 2022/23 and FY 2023/24 (adopted June 1, 2022)
- Initiated American Rescue Plan Act Budget and Expenditure Plan

Economic Development and Finance

- Secured an opinion from bond rating agency that confirmed that the City is now credit worthy, with an investment-grade prospective rating of AA-.
- Initiated the process of diversifying the City's local and regional economy to guard against overreliance on a small number of segments.

Plan of Adjustment

- Through FY2021/22, the City settled remaining lawsuits that were pending against the City while in bankruptcy.
- Coordinated the final discharge of the City's bankruptcy process in October 2022.

Capital Improvements

- Contracted for construction of 2nd Street Bridge replacement.
- Directed road improvements to over 100 sections of streets and roads.
- Initiated repairs and upgrades to historic California Theatre.
- Initiated repairs and upgrades to Encanto Community Center (formerly Boys & Girls Club), which will add a badly needed gym to the City's park system.
- Initiated Major League Baseball-directed improvements to Inland Empire 66ers/San Manuel Stadium.
- Upgraded/repaired various park facilities, including parking lots at Perris Hill and Lytle Creek parks.

Real Estate

- Negotiated 20 year Lease Extension with Inland Empire 66ers for their long-term tenancy at San Manuel Stadium.
- Negotiated Exclusive Negotiating Agreement (ENA) for Carousel Mall.
- Negotiated Termination Agreement for Arden-Guthrie property.
- Initiated negotiations with proposed developer for Seccombe Lake Park "Eyes on the Park" residential development.
- Initiated negotiations with potential developer for Transit Center transit-oriented development.

Legislative Advocacy

- Developed Legislative Platform for 2020/21 and 2021/22.
- Contracted with Hurst Brooks Espinosa, LLP for Advocacy and Lobbying Services.
- Oversaw, directed the development, and submittal of funding requests to State Senate and Assembly.
- Oversaw, directed the development, and submittal of funding requests to Federal legislators, departments, and agencies.

Intergovernmental Partnerships

- San Manuel Band of Mission Indians
 - Animal Shelter Grant
 - Homelessness Initiatives
- County of San Bernardino
 - Animal Shelter Cooperative Agreement (Pending)
 - Homelessness Initiatives and Cooperative Agreement
 - Flood Control property acquisition adjacent to Auto Center-expected to result in relocations and expansions (Pending)
 - Stormwater System Improvements
 - Street Improvements

- San Bernardino County Transportation Agency
 - Mount Vernon Bridge Replacement Entitlements
 - Waterman Interchange Improvements/Upgrades
 - Homelessness Initiatives
- Caltrans
 - 2nd Street Bridge Replacement Approvals
 - Homelessness Cleanup Projects
- California State University, San Bernardino (CSUSB)
 - Legislative Platform Development
 - Support for approval and funding of Master of Science in Physician Assistant (MS-PA) program
 - Advocacy for Regional Transportation Improvements
- San Bernardino Community College District (SBCCD)
 - Site Acquisition Support
 - Legislative Platform Development
 - Support for affordable housing for community college students
- University of California Riverside (UCR)
 - Medical School/UCR Health Clinic Expansion Program
 - Legislative Platform Development

Developer Projects & Expressions of Interest

- Lincoln Property Company-West
- Lewis Group of Companies
- Greens Group
- Palm Development
- Richman Group of California (Richman Homes)
- National COR
- Overland Development
- Frontier Communities
- Graystone Capital Advisors
- Miscellaneous Confidential Investment Groups

March 2009-February 2020: Assistant County Executive Officer, Riverside County Economic Development Agency

Managed the Riverside County Economic Development Agency (EDA), an agency with 22 divisions, a staff of more than 800, and an annual budget exceeding \$600 million. EDA's responsibilities were numerous, and include managing all construction within the County's \$1.5 billion Capital Improvement Program, running the County's Redevelopment Agency and subsequently the Successor Agency to the County Redevelopment Agency, managing all of the County's Workforce Investment programs, providing for the public's needs through the Community Services Division, running the

County's Housing Authority, managing various types of affordable housing programs, managing all of the County's real estate, and running the County's airports and the annual County Fair & National Date Festival.

Examples of specific responsibilities include: establishing County policies relative to economic development, redevelopment, workforce development, and affordable housing; management of County lobbyist activities in Washington, D.C. and Sacramento; negotiation of agreements pertaining to major land and building acquisitions, mitigation fee programs, and lawsuit settlements; development of foreign trade and foreign direct investment programs and policies, and negotiation of trade agreements; development of special legislation in cooperation with federal and state legislators; serving as co-chair of the County's Capital Improvement Program (CIP) team; and budget preparation, review, and monitoring, and personnel management.

April 2006- March 2009: Director of Facilities Management, County of Riverside

Managed the County of Riverside's Department of Facilities Management, with a staff of more than 600 distributed among five divisions (Design & Construction, Real Property, Maintenance, Custodial, and Administration), an annual operations budget of more than \$80 million, and an annual capital budget of approximately \$120 million. The department has long managed the County's capital building program, along with operating and maintaining the County's real estate inventory, including over 540 owned buildings, approximately 250 leased facilities, and numerous unimproved parcels of land.

Specific responsibilities included: budget preparation, review, and monitoring; fiscal management and analysis; serving as co-chair of the CIP team; capital project management (conceptualization, budgeting, space planning, architect/engineer selection, design review, and construction management); personnel management (hiring, promotion, reviews, and disciplinary actions); negotiation of real property agreements; coordination of maintenance programs and custodial operations County-wide; and negotiation of lease agreements.

6/05-4/06: Assistant Director

10/03-6/05: Deputy Director

7/00-10/03: Principal Development Specialist

1/14/99-7/00: Senior Development Specialist

Riverside County Economic Development Agency

Managed EDA's Desert Office, with responsibilities including: capital project management (conceptualization, budgeting, space planning, architect/engineer selection, design review, and construction management);

personnel management (hiring, promotion, reviews, and disciplinary actions); redevelopment program budgeting and management; and Community Planning and Development Program budgeting and management. Management activities included planning, organizing, and directing the work of multi-disciplinary project teams made up of general contractors, architects, landscape architects, civil and structural engineers, geologists, biologists, and archaeologists, as well as EDA staff. Funding sources for managed projects include Redevelopment Agency funds, CDBG funds, and special grant funds from various Federal and State agencies.

Managed the Riverside County Fair and National Date Festival, including: budget preparation, review, and monitoring; fiscal management and analysis; event coordination and contracting; entertainment selection and scheduling; and facility management (e.g. scheduling interim events, establishing and monitoring maintenance policies/programs, capital improvement prioritization and budgeting).

Managed EDA's Aviation Division, including: budget preparation, review, and monitoring; fiscal management and analysis; management of marketing efforts and website creation/revision; coordination of air shows; oversight of Federal Aviation Administration (FAA) grant applications; coordination of operations and maintenance activities; preparation of Minimum Standards for Fixed Base Operators; oversight of land and facility leases; management of personnel; budget preparation and management; and project management and supervision for various airport improvement projects, including runway extensions, infrastructure improvements (e.g. streets, water systems, sewer systems, storm water control facilities), and long term pavement maintenance projects (e.g. slurry seals, overlays).

Managed EDA's Housing Rehabilitation and Ownership (HRO) program, including: management of marketing efforts and website revisions; application review; project implementation; report and budget preparation; communication with the U.S. Department of Housing and Urban Development (HUD); management of personnel; and review of environmental documents. Components of the HRO Program include the Enhanced Senior Home Repair Program, the Senior Home Repair Program, the Agricultural Housing Programs, and the Home Rehabilitation Program.

Managed the County of Riverside's Community Planning and Development (CPD) program, including: application review; project implementation; report and budget preparation; communication with HUD; coordination of HUD audit cooperation and responses; management of personnel; and preparation and review of environmental documents. Components of the CPD Program include the Community Development Block Grant (CDBG) program, the HOME Improvement Partnerships Act (HOME) program, and the Emergency Shelter Grant (ESG) program.

Managed EDA's Real Property division, including: management of personnel; negotiation of real property agreements, including purchase agreements regarding the acquisition of sites for various types of public facilities (e.g. sheriff's stations, libraries); and negotiation of lease agreements regarding County-owned lands at French Valley Airport, Hemet-Ryan Airport, and Jacqueline Cochran Regional (Thermal) Airport.

**8/91-1/99: Associate Project Development Specialist/Environmental Specialist
Krieger & Stewart, Incorporated**

Assembled, coordinated, and supervised Project Teams and Work Groups in the development of projects related to the redevelopment and/or economic development of various Riverside County communities, including Cabazon, Rubidoux, and Mira Loma. Prepared, processed, and administered loan and grant applications to various federal and state agencies, including the U.S. Economic Development Administration, the U.S. Environmental Protection Agency, the Federal Emergency Management Agency, the California Department of Water Resources, and the California Department of Health Services. Participated in bond issues, including preparation of Official Statements. Administration of various planning and public works projects, including monitoring of project budgets and determination of probable economic impacts. Developed and presented recommendations regarding proposed projects, with presentations made to both legislative bodies (such as City Councils and Special District Boards of Directors) and administrative staff (such as General Managers and Department Directors).

Established and maintained close working relationships with funding and regulatory agencies at the federal, state, and local levels. Researched for and prepared environmental documents pursuant to the National Environmental Policy Act (NEPA) and the California Environmental Quality Act (CEQA); documents prepared have included Environmental Impact Reports, Environmental Assessments, Initial Studies, Negative Declarations, Findings of No Significant Impact, and Mitigation Monitoring Programs. Compilation of project statistical data and comparison with previously established program goals. Prepared, negotiated, administered, and monitored contracts and agreements regarding the development and construction of various projects, particularly public works improvements. Preparation of Statements of Qualifications, Proposals, brochures, and other public relations documents. Trained and evaluated staff and sub-consultants at various levels.

Special Skills:

Through my education and work experience, I have developed a clear understanding of the critical elements involved in departmental and fiscal management, with a particular emphasis on qualities of leadership. As a

result of a number of special assignments, I have developed the ability to negotiate complex agreements with various types of organizations, including industry working groups and employee organizations. I have repeatedly demonstrated an ability to assemble strong management teams, and have converted multiple organizations that were on the verge of failure into entities that not only survive, but thrive. I have also developed strong written and verbal communication skills, with a particular ability to prepare well-organized and concise documents, such as board submittals, staff reports, policy statements, legislative platform items, funding applications, and agreements. In addition, I have routinely assembled and lead multi-disciplinary project teams made up of engineers, architects, landscape architects, geologists, biologists, and archaeologists.

Education: University of California, Riverside
Bachelor of Arts, History, 1989

California Baptist University
Master of Arts, Leadership and Organizational Studies, 2014

University of California, Riverside
Extension Certificate in Land Use and Environmental Planning, 1998

University of California, Riverside
Extension Certificate in Economic Development Management, 1998

Other

Affiliations: Board Member, Inland Empire Community Foundation

Board Member/Executive Committee Member, March Field Air Museum

Member, Advisory Council, Center for Economic Development and Innovation, University of California, Riverside

Board Member and Past Chair, Dean's Advisory Council, UCR Business School, University of California, Riverside

Board Member and Past Chair, University of California, Riverside Athletics Association

Honorary Commander, 452nd Air Mobility Wing, March Air Reserve Base

Committee Member, Military Affairs Committee, Greater Riverside Chambers of Commerce

Founding Member, March Field Foundation

References*:

Karen Spiegel, 2nd District Supervisor
County of Riverside

John F. Tavaglione, 2nd District Supervisor (Retired)
County of Riverside

Tiffany North, County Counsel
County of Ventura

Marion Ashley, 5th District Supervisor (Retired)
County of Riverside

Darren Goodman, Chief of Police
City of San Bernardino

Ron Loveridge, Mayor (Retired)
City of Riverside

Peter Aldana, County Assessor-Clerk-Recorder
County of Riverside

*Contact information available upon request

ABOUT ME

Ethical, Adaptable, Collaborative,
Respectful, Creative, Honest,
Empathetic, Enthusiastic, Strategic,
Proactive Problem Solver, Skilled
Communicator

BEVERLI A. MARSHALL

DEAR MR. HALL,

I am excited to offer my resume for your consideration as the next General Manager for the Incline Village General Improvement District. I have 25 years of experience working for local government agencies of diverse sizes and complexities. This experience spans the breadth of government services, including finance, human resources, public works, utilities, housing, parks, recreation, and library. I am also familiar with working with mountain and resort communities.

With 20 years of experience at the executive and senior management level in public agencies, 13 years in the water industry, I have a proven record of success in implementing policies and programs to meet strategic goals and objectives. Here is a brief list of my career highlights.

- ✓ ICMA Credentialed Manager
- ✓ Certified Special District Manager
- ✓ Developed and managed award-winning operating and CIP budgets
- ✓ Negotiated \$71 million low-interest green energy infrastructure loan to upgrade wastewater plant to move toward recycled water
- ✓ Facilitated strategic plan process to establish goals and objectives
- ✓ Successfully negotiated labor contracts while maintaining positive working relationships with union representatives
- ✓ Formed a regional apprenticeship program in collaboration with community colleges, public agencies, and a private company
- ✓ Implemented multiple software conversions to improve operational efficiency and transparency
- ✓ Developed rapport with diverse internal and external stakeholders
- ✓ Created, obtained grant funding, and managed social services program for low-income public housing residents
- ✓ Presented at professional conferences on a variety of topics

I thrive in a dynamic and challenging environment and excel at organizational development, strategic planning, and policy development. I am committed to government transparency and community engagement. I also believe in empowering employees by creating a culture focused on learning and growth.

My education, experience, and skills make me the best candidate for General Manager for the Incline Village General Improvement District. I look forward to speaking with you about this position. Thank you for your consideration.

Respectfully,

Beverli A. Marshall

Beverli A. Marshall, ICMA-CM

Bob Hall
Bob Hall & Associates

BEVERLI A. MARSHALL

RESPECTFUL | EMPATHETIC | COLLABORATIVE | CREATIVE | OPTIMISTIC | ETHICAL

Energetic, proactive executive with broad experience in city, special district, and other local government management and administration. Approachable self-starter with an established reputation for collaboration and communication with local and regional agencies. Proven track record of serving community needs through local services and client-focused programs. Demonstrated success inspiring, motivating, and coaching all-star staff.

CORE COMPETENCIES

- * Organizational Development
- * Strategic Planning
- * Budget & Finances
- * Change Management
- * Communications & Public Relations
- * Labor Relations

PROFESSIONAL EXPERIENCE

City of Glenwood Springs

March 2023 – August 2023

CITY MANAGER

Glenwood Springs, CO

Chief Executive Officer (CEO) for the city, accountable for all operational, fiscal, and business functions related to municipal government with a fiscal year operating appropriation of **\$65M**, CIP project budget of **\$30M**, **200 employees**, and serving a community of **10,000 residents**. Develop and implement policies, programs, and procedures to drive regulations, policies, and ethical standards.

Valley Sanitary District

June 2019 – March 2023

GENERAL MANAGER

Indio, CA

Chief Executive Officer (CEO) for the district, accountable for all operational, fiscal, and business functions related to wastewater facilities with an operating revenue of **\$18M**, CIP budget of **\$35M**, **36 employees**, and serving a community of **84,000 residents**. Lead and facilitated improvements to comply with regulatory requirements in environmentally sensitive areas. Developed and implemented policies and procedures to drive regulations, policies, and ethical standards.

- Implemented **Strategic Plan** and **5-Year Sewer Use Rate Plan** to achieve the Board's vision and goals.
- Established district-wide **Diversity, Equity, and Inclusion Committee** to support a workplace culture that embraces diverse people and opinions.
- Collaborated with other government agencies, community colleges, and non-profit agencies to develop the **Desert Region Water Apprenticeship Program** to address industry-wide talent succession.
- Resurrected the direct aquifer recharge **Recycled Water Project** and secured funds for planning and design.
- Developed and implemented **Succession and Staffing Plan** creating a culture of learning to train, mentor, and prepare the next generation of supervisors and managers.

Sewer Authority Mid-Coastside

December 2015 – June 2019

GENERAL MANAGER

Half Moon, CA

Chief Executive Officer (CEO) for the joint powers authority, accountable for all operational and business functions related to wastewater with an operating budget of **\$8M** and **14 employees** serving a community of **28,000 residents**.

Lead and facilitated improvements to comply with regulatory requirements in environmentally sensitive area.

- Reduced Sanitary Sewer Overflows (SSOs) to **zero in a twelve-month period**, achieving regional objectives.
- Facilitated and implemented **Strategic Plan**, staffing plan, **5-year infrastructure plan**, and **20-year CIP**, allowing the Board to focus on long-term issues and funding opportunities.
- Awarded **Excellence in Budgeting** from California Society of Municipal Finance Officers.
- Created Coastside OneH2O coalition with **10 local public agencies** to leverage water quality outreach resources.
- Implemented new financial software, achieving **efficiency** for staff and **transparency** to the public.

West County Wastewater District

August 2009 – December 2015

BUSINESS SERVICES MANAGER

Richmond, CA

Chief Administrative Officer (CAO), responsible for fiscal and business functions at an agency with an operating budget of **\$17M** and **\$33M CIP budget**, managing **11 employees**, and serving a population of **100,000 residents**.

Directed staff involved with financial and administrative responsibilities. Served as chief labor negotiator for all represented and unrepresented units. Developed and implemented policies, programs, and procedures to comply with applicable statutes, regulations, policies, and ethical standards.

City of Orinda

September 2007 – August 2009

DIRECTOR OF ADMINISTRATIVE SERVICES

Orinda, CA

Chief Administrative Officer (CAO) with responsibility for fiscal, administrative, and employee relations functions with a combined **\$13M** operating and capital budget, managing **6 employees**, and serving a community of **20,000 residents**.

Developed and executed policies, programs, and procedures to comply with statutes, regulations, and policies.

City of Berkeley

July 2003 – September 2007

VARIOUS POSITIONS

Berkeley, CA

Finance Manager of the Berkeley Public Library – a separate agency defined in the City's charter, with a **\$14M** budget serving **113,000 residents**. Oversaw administrative, fiscal, and employee relations functions.

Chief Executive Officer (CEO) of the Berkeley Housing Authority – a separate agency defined in the City's charter, with responsibility over **75 units** public housing and **2,100 vouchers**, and an operating budget of **\$25M**.

Senior Management Analyst of the Parks, Recreation & Waterfront department – managed **\$20M** operating and CIP budget, **\$10M** Boating & Waterways loan, and **\$12M** Parks Tax Fund. Oversaw department administrative, fiscal, and employee relations functions as well as contracts for services, supplies, and capital projects.

San Francisco Housing Authority

July 2001 – February 2003

DIRECTOR OF HOUSING

San Francisco, CA

Chief Operating Officer (COO) managing all operational functions for **6,500** public and mixed-finance units with **77**

employees.

CIVIC LEADERSHIP EXPERIENCE

- Indio Sunrise Rotary Club – President (2021 – 2022)
- Woman's Club of Indio – Parliamentarian (2021 – 2022)
- California Special Districts Association, various committees (2013 – current)
- Mt. View Sanitary District, Board of Directors – Director (2014 – 2015)
- Girl Scouts of America – Troop Leader and Sales Coordinator (2004 – 2011)

EDUCATION & CERTIFICATION

DOCTOR OF BUSINESS ADMINISTRATION (DBA) – *Business Administration*

Alliant International University

San Diego, CA

MASTER OF PUBLIC ADMINISTRATION (MPA) – *Public Management*

University of Alaska

Anchorage, AK

BACHELOR OF ARTS (BA) – *Sociology*

California State University

Bakersfield, CA

Individualized Study Program

University of Redlands, Johnston Center for Integrative Studies

Redlands, CA

Credentialed Manager

International City/County Management Association

Certified Special District Manager

Special District Leadership Foundation

Recognition in Special District Governance

Special District Leadership Foundation