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PUBLIC MANAGEMENT



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Professional Standards *Matter*

Understanding ICMA's Ethics Enforcement Process

BY MARTHA PEREGO, ICMA-CM

One critical element

of ICMA's approach to improving the ethics of the profession is to hold our members accountable for their conduct. When a member's conduct raises ethical concerns, ICMA carries out a formal peer review process to objectively determine whether the member violated the ICMA Code of Ethics. After all, if the profession doesn't have a mechanism to enforce its high standards, what's the value in having a Code at all?

Based purely on the trends, the likelihood that a member will go through the ICMA ethics enforcement process sometime in his or her career is very low. With a total membership of more than 12,000, the annual workload ranges from 40 to 50 cases.

However, the lack of familiarity with the enforcement process generates questions when incidents of wrongdoing hit the light of day. Given the profession's commitment to accountability, ensuring that the process for enforcing the Code of Ethics is



clear and understood is important. To add clarity, here are answers to frequently asked questions:

Who oversees the process? The ICMA Constitution requires the ICMA Executive Board to establish a standing Committee on Professional Conduct (CPC). The rules by which the CPC enforces the Code are established by the Executive Board.

Who is on the CPC?

Each member is selected from the vice presidents elected by the members to serve on the executive board. They are peers who serve local governments in either the capacity of manager or assistant.

What's the role of the CPC? Operating under the rules established by the board, the CPC investigate ethics complaints, has the sole authority to determine when a violation of the Code occurs, and recommends sanctions to the full executive board.

Who is covered by the Code of Ethics? When joining ICMA, the individual agrees to comply with the Code. Members working for a local government, special



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Creating and Supporting Thriving Communities

ICMA's vision is to be the leading association of local government professionals dedicated to creating and supporting thriving communities throughout the world. It does this by working with its more than 12,000 members to identify and speed the adoption of leading local government practices and improve the lives of residents. ICMA offers membership, professional development programs, research, publications, data and information, technical assistance, and training to thousands of city, town, and county chief administrative officers, their staffs, and other organizations throughout the world.

Public Management (PM) aims to inspire innovation, inform decision making, connect leading-edge thinking to everyday challenges, and serve ICMA members and local governments in creating and sustaining thriving communities throughout the world.

district, municipal league, or council of governments—whether on a full-time, part-time, or interim basis, or as an intern—must adhere to the entire Code. Members who are working in another field, students, and Life or retirees must follow Tenet 1 (Democracy) and Tenet 3 (Integrity).

When does ICMA launch a review?

A review will only be initiated when a valid written complaint is filed with ICMA. ICMA staff working on ethics issues do not initiate a review because their role is to administer the enforcement process. It would be a conflict of interest to serve both as the complainant and the administrator.

What constitutes a valid complaint?

The complaint must be in writing, clearly outline the alleged misconduct, and support the allegation with documentation. Next, we assess whether the alleged misconduct, if proven to be true, would be a violation of the Code. If the answer is yes, ICMA will proceed with the formal review.

Do I have an ethical obligation to file a complaint when I see unethical conduct? If you are a member of ICMA, yes. The guideline under Tenet 3 states, “When becoming aware of a possible violation of the ICMA Code of Ethics, members are encouraged to report the matter to ICMA. In reporting the matter, members may choose to go on record as the complainant or report the matter on a confidential basis.”

Ethics complaints do come from the public, elected officials, and staff who are not members of ICMA.

When a member's conduct raises ethical concerns, ICMA carries out a formal peer review process to objectively determine whether the member violated the ICMA Code of Ethics.

But we can't rely on others to enforce our ethical standards. There is a whole universe of inappropriate conduct where the associated risk and potential damage may only be visible and really understood by another professional in the field. Therein lies part of the value of self-policing.

Do I have to go on record if I file a complaint?

No. You can request that ICMA regard you as an anonymous complainant. Your name will not be shared with any of the parties in the matter.

Is it confidential? The entire review process is confidential, unless and until it results in a finding by the ICMA Executive Board that a member has violated the Code and the appropriate sanction is a public one. Absent that, ICMA does not comment that a member may be under review and every ICMA member must maintain confidentiality about the review.

Does the ethics complaint process end if the member quits ICMA?

No! Once a case has been opened, ICMA will continue the process to its conclusion. That said, ICMA cannot open a case with a former member unless that person agrees to participate.

What about the member's point of view? The process begins with the assumption of innocence. After all, the information presented may not be accurate. And the member's perspective on what transpired hasn't been heard.

The member is given the opportunity to review the entire complaint and all documents. The member then has the chance to provide a detailed written response to the CPC. The opportunity to explain what transpired and provide supporting documentation, as well as statements from

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Given the profession's commitment to accountability, ensuring that the process for enforcing the Code of Ethics is clear and understood is important.

others, is key to getting at the facts.

The CPC reviews the member's response and if the facts are clear, it will draw a conclusion as to whether the member's conduct violated the Code. If the facts aren't clear, the next step is to ask the state association to appoint a fact-finding committee. If the member fails to respond, the CPC will use a fact-finding committee to gather more documentation.

What role does fact-finding play?

Members assigned to the fact-finding committee gather the missing

information and report back to the CPC within 60 days. They interview the member, may interview others connected to the case, collect public records, and in the case of legal matters, obtain court records. They do not determine guilt or innocence. The fact-finding committee submits its findings to the CPC for review. A copy of the report is provided to the member. This is the final step in the data-gathering process.

What are the penalties? If the CPC concludes that the member did violate the Code, it can select from an array of censures, including private censure, public censure, suspension from membership for up to five years, permanent membership expulsion or bar, and credential revocation. All the options beyond a private censure require approval by the ICMA Executive Board.

Is there an appeal process? Any sanction can be appealed to the Executive Board, where the member can address the board in an executive session hearing.

How is the outcome publicized? ICMA notifies the complainant and the state association president that the matter has been resolved. When a public censure is issued, notice of that action is shared with the news media, as well as the appropriate governing body.

As with any process, the outcome is not always to everyone's satisfaction. That said, ICMA members must be willing to report in good faith matters of concern. Allow an objective peer review process to sort out the facts and reach an independent judgment. Consider the potential loss of public trust and confidence in the professionals who lead and manage local governments if our high ethical standards are not followed and uniformly enforced. **PM**



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If you are an ICMA member, we want to hear what's new in your career or organization. All members are welcome to submit—from CAOs to students. Please complete the form at icma.org/spotlight-members. Check out the August Member Spotlight with Aram and Armine Chaparyan, California's first-known brother and sister city manager duo, on the inside back cover of this issue.



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To Elevate Council-Manager Relations, Step into the Ebb and Flow

The most effective local government leaders **understand** the fluidity of the relationship. | BY MARC A. OTT

In times of uncertainty, unpredictability, even volatility, it is tempting for leaders to reach for “what’s worked in the past.” For local government appointed and elected officials alike, that might mean clinging to roles carved out in the early days of the council-manager form of government. The mayor and council stick to policy making while the CAO and his or her team focus on the day-to-day operations of running the community.

However, in an era that has brought us a global pandemic, the uncertainty of climate change, and the angry polarization of residents to name a few, the hard line between policy and administration, which may have worked well in the past, has become diffuse at best. The most effective local government leaders understand the ebb and flow of council-manager relations—how there are times when elected officials might roll to the administrative side and times when appointed officials might step into the policy realm in order to successfully resolve community challenges.

Operating in a more fluid environment presents opportunities for building new skills and refining existing approaches. When a maverick councilmember spends too much time in the operational space, you may be tempted to pull out the charter and point out the boundary violation. But that’s probably not going to move the issue or the organization forward. Rather, spend the time required to understand where the councilmember is coming from and demonstrate that you are interested in their perspective and in helping them to achieve their goals and objectives. Hopefully, they will see that engaging you in tackling their operational issue will lead to far better outcomes because of your experience and full command of the local government’s resources.

On the other side of that ebb and flow, I have been lucky over the course of my career to work with some real visionary mayors and councilmembers. They were able to see the needs of the community beyond the present day and craft the kinds of transformative policies that were



THE MOST EFFECTIVE LOCAL GOVERNMENT LEADERS UNDERSTAND THE EBB AND FLOW OF COUNCIL-MANAGER RELATIONS.

needed. In other instances, that was not the case and I have become persuaded that CAOs must step into that leadership void when necessary.

There are ways of doing this that do not violate our code. For example, when you and your staff identify issues that must be addressed by new or amended policies, you may ask the council to convene around the issue. You might facilitate the discussions if asked or participate as an expert, sharing data and helping elected officials build consensus. In the end, it's important to remember that the final decisions on policy lie with elected officials, and even if the outcome isn't what you may have hoped for, you are responsible for communicating and allocating the resources for the policy implementation.

Working through the ebb and flow can be a tricky business and requires continuous self-evaluation. Are you engaging in policy discussions for the right reasons or are you trying to exercise control over your council?

how things should be versus creating a truly collaborative environment? Is the relationship between you and your elected officials based on mutual respect?

Sometimes, it seems the easy thing to do is fall back and remain strictly bound by definitions of roles that have become outdated in this current environment of uncertainty and volatility. Ignore the issues that challenge our narrowly defined roles at your own and your local government's peril. It takes diplomacy, tact, empathetic listening, huge amounts of time, flexibility, creativity, and innovative thinking to operate successfully in this diffuse space. Most of all, it takes the kind of courage that led you to a career in local government leadership to begin with—the desire to leave the community better off than when you arrived. **PM**

How often are you stepping into this space; is it too frequent? Are you clinging to your own vision of



MARC OTT

is CEO/executive director of ICMA, Washington, D.C.

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Elected Official *Onboarding* and *Orientation* | BY CHELSEA JACKSON

The **importance** of setting the right tone from the start

Every city and county has some type of process to onboard its new employees, whether it's simply a review of benefits or a full tour of the city and departments on day one. However, the orientation that is not standard among communities is the onboarding of elected officials.

As managers, our role is to ensure that our elected officials have the knowledge and ability to serve the community and its residents. Structuring a one- to two-day training tailored specifically for your municipality is beneficial for staff, residents, and your entire governing body.

The city of Douglasville, Georgia, has established a one-day orientation for newly elected officials, along with a council orientation manual. The manual provides information and resources they may need in their role, such as the basic structure of the city government, guidance regarding certain city policies and procedures, and a list of city authorities, commissions and boards. The following is a list of items to include in a newly elected official onboarding and/or to include in the contents of a council orientation manual:

1 Operations and Meetings with Key Staff

It's important to ensure your elected officials have a general overview of city/county operations. This includes an overview of the charter, organizational chart, various departments, etc. During onboarding, provide time for each department director to provide a general overview of their department and its operations. This is especially important if there is a committee structure and each elected official may be the chair of a committee/department. Ensuring that they are informed about the operations will assist with better planning and the passage of items needed to better the community.

2 Major Projects and Plans

As we often say in Douglasville, "Dirt is moving!" Any ongoing major projects or plans should be conveyed to newly elected officials. In our organization, every current and upcoming project is discussed with the elected officials during orientation, including tours of projects currently in progress. There is also an executive summary and project timeline printed and placed in every manual.



CHELSEA JACKSON is assistant city manager of Douglasville, Georgia.



3 Financial Outlook and Budget

The budget is another key component of onboarding. Providing them with copies of the current budget and previous fiscal year budgets can give them a clearer picture of key projects and forecasting financials. Be sure to include an outline of the budget process and timeline, along with information on capital projects and improvement plans.

4 Charter/Codes, Mission, and Council Meetings

These items are self-explanatory. The charter is a written document that provides the municipality with the authority to exist and function. The charter is the city's fundamental law. A copy of the charter is also provided in the Douglasville manual, as well as reviewed during the onboarding experience. Also providing the city's mission, vision, and ethics policy allows the elected official to ensure they understand the guidelines that assist with operating the city effectively and efficiently.

Structuring a one- to two-day training tailored specifically for your municipality is beneficial for staff, residents, and your entire governing body.

5 Meetings, Education, and Travel

Each elected official should be provided a meeting schedule, a copy of their education and training budget, and information regarding any upcoming training opportunities that will help them in their new role. Providing this information will assist them in planning for training that will enhance their ability to make sound decisions while within their role.

The importance of providing a true onboarding opportunity and manual is beneficial for your elected officials, your staff, and your community. Setting the tone from day one with a high-quality onboarding experience allows for a smooth progression throughout the term of the elected official. It provides clarity and shows that staff is dedicated to the long-term success of the official and the success and quality of life of the community. **PM**

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MANAGING COUNCIL/ STAFF RELATIONSHIPS

IN AN ELECTION YEAR AND BEYOND



Understanding the importance of the relationship between CAO and elected officials before, during, and after election.

BY DARRIN TANGEMAN, ICMA-CM; MIKE CONDUFF, ICMA-CM; CHERYL HILVERT, ICMA-CM; AND MARTIN BERNAL



Relationships. As humans, the relationships we form with others are critical to our mental health and emotional well-being, and in many cases, our survival. Research shows that healthy relationships can help us live longer, manage stress more effectively, enjoy better health, and generally feel “richer” as a human being.

The importance of relationships may be even more significant for those in the local government management profession who work with a wide variety of people, including elected officials, volunteers, community members, businesspeople, staff members, and many others. But there may be no more important relationship than that between the city/county manager (and his or her staff) and their elected officials.

The council-manager relationship is critical to the successful workings of the well-oiled local government machine. This is true both in an election year and at other times. Not only is the relationship between the manager and elected officials the primary factor impacting a manager’s job satisfaction, but it is also a determinant of the ability of the local government to perform effectively, within budget, while creating value and garnering support for its work from the community.

Kevin Duggan, ICMA-CM, retired city manager and current ICMA senior advisor in California, has done a great deal of writing about council-manager relationships. “The important relationship between a manager and their elected officials cannot be taken for granted and requires attention and work to establish and maintain.” He identifies five obstacles that can get in the way of this relationship, including:

- Not understanding/appreciating/respecting each other’s roles.
- Differing philosophies.
- Differing personalities.
- Challenging issues.
- External pressures from the media, community groups, employee organizations, etc.

Trouble in Santa Cruz

Each one of these is challenging in its own right, but imagine experiencing them all at the same time. Martin Bernal, former city manager for Santa Cruz, California, was kind enough to share with us the hurdles that he experienced during his tenure as city manager.

The council-manager relationship is critical to the successful workings of the well-oiled local government machine.

A little background: Santa Cruz is a university town and very politically active. It is the county seat and the region's cultural and economic center. In 2018, the councilmember election was fraught with tension. The campaign turned nasty and the results brought a shift in majority from moderate to progressive.

The new councilmembers were not happy with the current state of affairs and they did not trust the city staff. The council genuinely wanted to solve problems and make things better, but they had no experience and did not understand local government structure, much less the council's role in it. The new councilmembers were also not familiar with the charter provisions, and as a result, were trying to do things that were not within their authority. They were not interested in listening to Martin's advice and proceeded with policies that the public was not in favor of.

In addition, there were complaints from both the city staff and the public about hostile treatment from councilmembers. Hostile workplace investigations

The prudent CAO starts long before the election cycle to develop and nurture a relationship with their governing body.

were initiated and several allegations were substantiated. Martin endured a horrible situation, but he used several of the tools that we will discuss to navigate the stormy waters.

Planning Ahead

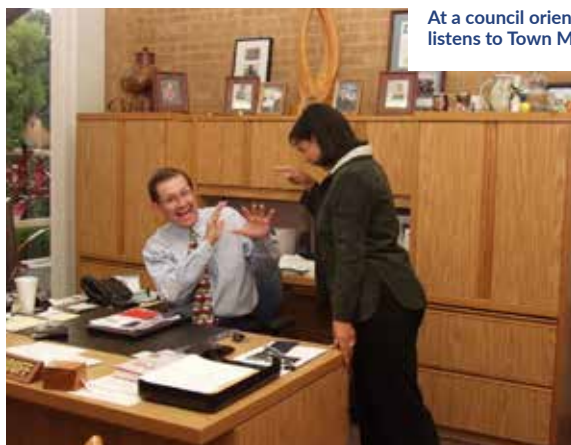
One way to avoid challenges with council is to maintain a relationship with the community and offer routine training for residents who are interested in running for council. While the election cycle is certainly a time when emotions run high and behaviors can be ambiguous, the prudent CAO starts long before to develop and nurture a relationship with their governing body. Darrin Tangeman, city manager for Truro, Massachusetts, suggests having a citizens academy. "It is a great way to start building relationships and defining roles and responsibilities *before* the council is elected. It's an opportunity to provide a history of the city and give an overview of operational and critical service activities."



At a council orientation in Westlake, Texas, Mayor Laura Wheat listens to Town Manager Amanda DeGan's presentation.

Orientation

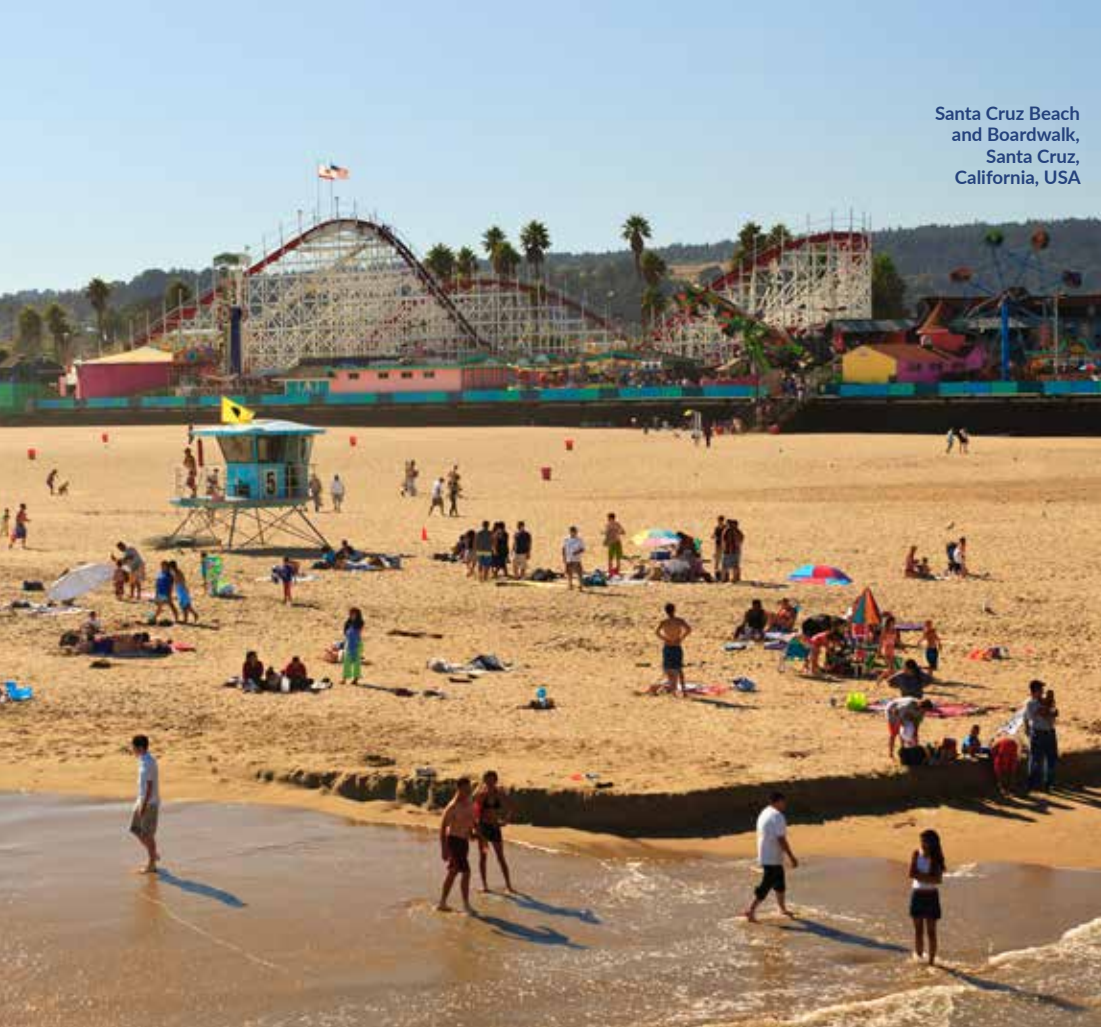
Once councilmembers are elected, conduct a council candidate orientation. The new member orientation should follow the election and should be executed as soon as practicable. Conducted in large part by the chief governance officer (mayor, county judge or commission chair, etc.), this serves as a "how do we" session. (How do we put things on the



Fort Worth Administrative Services Manager Pam Rambo Sexton providing candid feedback to author Mike Conduff.



The mayor and council of Lancaster, Texas, surprise City Manager Opal Mauldin-Jones at their annual retreat.



Conclusion

In closing, never underestimate how important it is for a local government manager to have a good working relationship with their elected officials. These relationships are critical to an efficient and well-run organization. But it's not always easy. If it were, there would not be so many webinars, articles, and conference education sessions about this topic! The suggested recommendations that we have included in this article have proven to be successful. Take advantage of them. ICMA's CoachConnect program (icma.org/1-1-coaching) is a great way to reach out to ICMA senior advisors for advice. And if you are interested in learning more, check out the recent coaching webinar, "Managing Council/Staff Relationships in an Election Year" at classroom.icma.org/p/managing_council. We can't stress enough the importance of a good connection between a city/county manager and his or her elected officials. Take the time to cultivate and nurture this relationship for the good of your community. **PM**

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agenda, how do we hear from the staff, how do we access our mailbox or iPad.)

Education and Team Building

You've started building relationships early through the citizens academy and you've conducted new council candidate orientation. What now? Council education and team building! Considering using the council education resources available through the National League of Cities, your state municipal league, or the area council of government. And if possible, attend the session along with your council. It will provide an opportunity for you to get to know them and have a better understanding of how to work them. It is also an opportunity to demonstrate the importance of the council-manager form of government!

As for team building, a facilitated council team building event incorporated into an annual strategic planning or leadership summit helps provide the council with group process skills. Understanding how to discuss difficult topics or why someone behaves the way they do is critical to long-term team success. And, of course, having a guidebook or governance manual gives everyone the comfort of a custom-designed process.

A Happy Ending for Santa Cruz

Are you wondering what happened in Santa Cruz? Let us tell you the rest of the story: A recall petition was validated and another election took place. The community really came together and realized that it's not just about the politics. Faith was restored

in both the electorate process and the council-manager form of government. It was a steep, rocky path, but Martin managed to climb it successfully. These are his top four tips for city/county managers:

1. Communicate with staff frequently and protect them—you are their shield.
2. Document everything.
3. Stay politically neutral—treat all councilmembers equally.
4. Never compromise your values or integrity.

In addition, Martin found it very helpful to contact ICMA senior advisors, like Kevin Duggan, for guidance. It is important to remember that many managers go through or have gone through similar situations. Reach out to them for advice!

Republican or Democrat Manager?

Why It's Crucial to Stay Politically Neutral



Professional city and county managers must adhere to the spirit of the ICMA Code of Ethics and remain politically neutral in today's hyper-politicized environment.

BY MATTHEW H. CANDLAND, ICMA-CM



I recently had a conversation with a fellow manager that gave me pause. This manager, who I consider a capable professional, has served with distinction in her current community. She told me of a former manager, no longer active in the profession, who once served as the manager in her community and has become active in the Republican Party. This former manager described her as the “Democrat manager.”

Given my knowledge of this colleague and her solid reputation, this former manager’s comment did not ring true to me. Professional managers, and especially ICMA members, take very seriously the ICMA Code of Ethics’ charge to “refrain from all political activities which undermine public confidence in professional administrators.”

What would happen to our profession though if managers were considered either “Republican managers” or “Democrat managers”? Said another way, what would

happen if some managers were members of “Team Red” and others of “Team Blue”? How would this affect our ability to effectively manage? How would this affect a manager’s working relationship with elected officials, and especially with those who hold contrary political views?

Why Political Neutrality

When a manager is perceived as partisan, he or she is likely to be viewed as biased or having a political agenda. This can lead to a loss of credibility and eventually public trust.

The council-manager form of government was created, in part, to engender public confidence in the professional administration of local government. Prior to the creation of the council-manager form, local governments were too often wrought with patronage, inefficient administration, and graft, which resulted in a perception of inefficiency and even corruption.

For over 100 years, and through the general adherence to the ICMA Code of Ethics, professional managers have, for the most part, garnered the reputation of being politically neutral and impartial. This has

led to better local government management and a higher level of trust among elected officials and citizens. In short, better outcomes.

Administration/Politics Dichotomy or Policy Development/Political Advocacy Dichotomy

Some have argued that the traditional administration/politics dichotomy is impossible to achieve, seemingly suggesting that even attempting to separate these activities is a fruitless endeavor. Of course, most practitioners recognize that there are boundaries to a manager's level of political involvement. One may not always be able to clearly define what those boundaries are, but we can often clearly tell when they are crossed.

Rather than striving to adhere to the traditional administration/politics

Sometimes a manager may not even be aware that what he or she is doing or saying is politically partisan or perceived as politically partisan.

dichotomy, it may be more realistic to strive for a policy development/political advocacy dichotomy. Managers need to and should be involved in the process of policy development, often making specific recommendations about which policy is best. Policy development suggests that a manager presents a variety of policy options to elected officials for issues that may be politically volatile or not.

Political advocacy, on the other hand, resides more comfortably within the realm of the elected official, especially with politically volatile issues. Especially with politically controversial issues, the manager should provide a variety of policy options based, at least in part, on the different political perspectives prior to making a recommendation.

The professional manager should operate much closer to the policy development end of the continuum and tread very carefully on the political

advocacy side, especially with politically volatile issues. A manager sometimes cannot avoid dealing with politically volatile issues, but how he or she presents policy recommendations can be the difference between appearing politically neutral or politically partisan.

Managers, like many people, often have strongly held political views and opinions. Professional managers, however, should work hard to hold these political views in check, especially when making policy recommendations to elected officials or making public statements. Again, politically neutral policy recommendations can often include a variety of policy options, some of which may be guided by different political ideologies. Presenting more than one option not only conveys political neutrality, it also provides elected officials with the kind of information they need to make sound decisions for their constituents.

A manager must be mindful of his or her own political positions. Sometimes a manager may not even be aware that what he or she is doing or saying is politically partisan or perceived as politically partisan. This can create a real blind spot that can hinder public trust.

Hyper-Politicized Environment

Our society is more politically divided today than it has been in decades and maybe even in our lifetimes. In today's social media environment, too many feel the need to take a political position on everything. At the same time, there is a corresponding increase in the number of issues that are now viewed as politically partisan.

In this environment, it is especially challenging for the professional manager to not only be politically neutral, but to also maintain the perception of political neutrality.

Political or Not Political?

Issues that just a decade or two ago were not considered politically partisan are today hotly debated. For example, a person may hold the view that abortion is wrong and should be illegal. This person may feel strongly that this is not a politically partisan position, but rather a moral position. Although it certainly could be viewed as a moral issue, most people would likely agree that it is also a political position. Further, many would presume that someone who holds this view is a member of “Team Red.” Whether it is actually a politically partisan position or not may not be as important as the fact that most people would perceive it as such.

Similarly, a person may hold the view that the growing level of gun violence should move lawmakers to enact more stringent gun control measures. This person may feel strongly that this is not a politically partisan position, but rather a moral position. Although it could certainly be viewed as a moral issue, most people would likely agree that this is also a politically partisan position. Further, many would presume that someone who holds this view is a member of “Team Blue.” Again, whether it is actually a politically partisan position or not may not be as important as the fact that most people would perceive it as such.

If a manager were to publicly advocate for either of these

issues, he or she would likely be viewed as taking a politically partisan position. Of course, there are many other issues that if publicly advocated for would also be viewed as politically partisan. What can complicate matters is that what is perceived as politically partisan can vary by community.

What to Do?

How can professional managers adhere to the spirit of the ICMA Code of Ethics and remain politically neutral in this hyper-politicized environment?

1. Be committed to the principle of political neutrality.
2. Be aware of your political positions and recognize that a position can be viewed as politically partisan even if one does not intend it to be.
3. Work hard to check one's political advocacy when carrying out the administration of local government, including policy recommendations.
4. Be willing to make changes and adjustments if one's actions are, or are perceived to be, politically partisan.
5. Remember the wisdom of personal and organizational restraint. Just because something is deeply
6. Understand that there is a difference between policy development and political advocacy. Sound judgment and a keen eye are sometimes needed to distinguish between the two.
7. Be familiar and conversant with different perspectives on the political issues of the day. This will not only help a manager be more aware of political issues, but also allow him or her to more

important to you individually does not mean that you should use your position to advocate for your political or partisan positions.

effectively present different policy options.

This subject is certainly a sensitive one, even among professional managers, but it is not likely to get easier. If the current trends of hyper-politicization continue, remaining politically neutral may eventually be one of the most vexing challenges facing the professional local government manager. **PM**

Just because something is deeply important to you individually does not mean that you should use your local government position to advocate for your political or partisan positions.

MATTHEW H. CANDLAND, ICMA-CM,
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BY JULIA D. NOVAK, ICMA-CM;
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GETTING TO GREAT:

Defining the Roles of the Governing Body and Local Government Manager

Understanding the various roles of elected officials and
how the CAO and staff can best support them.

Management is a supporting and essential role in local governance. Management supports the organization, the community, and, of course, the governing body. There is a dance that managers must do with their elected officials as they navigate the curved and blurry line between politics and administration, but this symbiotic relationship is built on the foundational premise that management is a supporting role.

Just as a manager's role changes with each situation they encounter, the role an elected official plays also shifts and changes. In 2016, we began working to define the various roles that local elected officials must play and identify how those roles relate to effective governance. Since that time, we have worked with dozens of elected bodies to understand these roles, the activities associated with each role, and how elected officials envision enhancing their own effectiveness.

These insights can be valuable to managers as they fine tune their "support role" and understand what can be done to help their elected body in governing effectively together.

The Roles

Through our work, we identified six council governance roles : Strategic Vision–Big Picture Thinker, Trustee–Steward, Representative–Constituent Advocate, Community Builder–Bringing People Together, Decision-maker, and Oversight.

- The **Strategic Vision–Big Picture Thinker** role focuses on decisions that can have significant impact on the community, both long- or short-term. This role often concentrates on the future and what might make a significant difference, while seeing possible connections and relationships and thinking beyond present data and constraints.
- The **Trustee–Steward** role involves listening to and respecting constituent views. The Trustee–Steward feels responsible to the community as a whole and to future residents and will make uncomfortable decisions that may run counter to constituent wishes if the decision is in the interest of the greater good.
- When operating in the **Representative–Constituent Advocate** role, an elected official acts as a "customer service representative." In this capacity, the elected official is a conduit between residents and local government services. Often, residents see this elected official as most responsive to their individual concerns.
- In the **Community Builder–Bringing People Together** role, an elected official focuses on relationships and consensus-building. The Community Builder fosters relationships and can work through differences. Community is not just a casual word to the elected official who gravitates to this role.
- The **Decision-maker** sees their role much like a judge, wherein information is presented and the Decision-maker votes it up or down. This is not an easy role, but

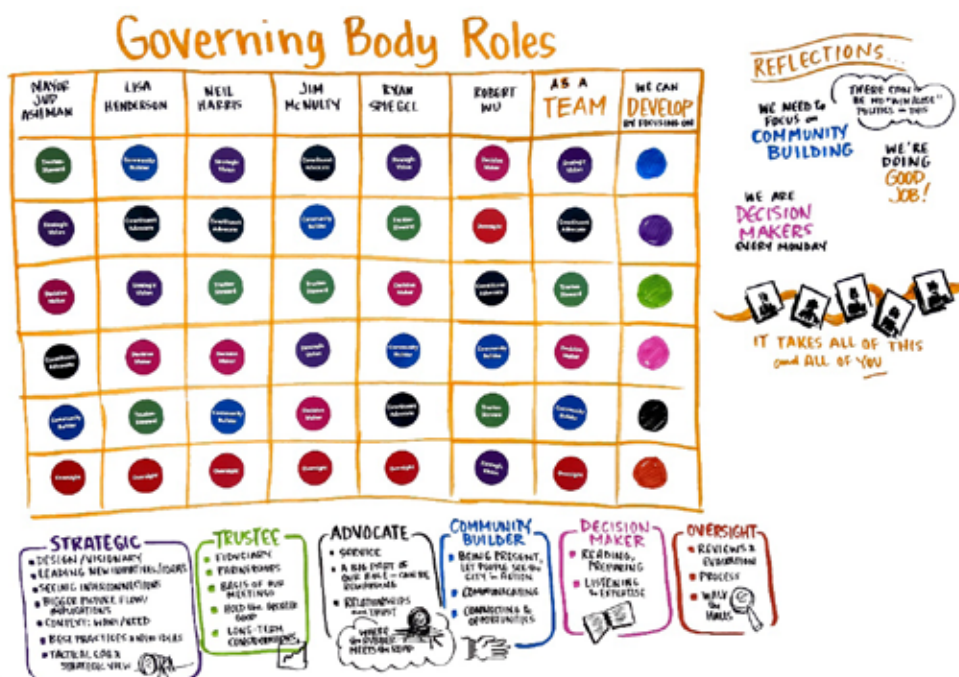
often it is a more passive role in contrast to that of the Community Builder.

- In the **Oversight** role, the elected official may retain a measure of distance from the staff. The focus of this role is on the accountability of staff to the elected body.

Since the development of the six governance roles in 2016, conversations about the roles have been incorporated into retreats with governing bodies across the country. During these retreats, the groups discuss the activities associated with each of the roles and then individuals are asked to rank for themselves the roles that come most naturally. The percentage of respondents ranking each of the corresponding roles as where they gravitate toward the most is shown in Figure 2.

It is interesting to note that none of the more than 200

FIGURE 1.



This graphic highlights the conversation and outcome of a recent governing body workshop.

elected officials we have worked with identified Oversight as the role that they naturally gravitate toward and yet this is the role that creates distance and tension between staff and the governing body.

Once we understand how each individual ranks and identifies with the six roles, we are able to provide an aggregate ranking or group profile. The following is the collective distribution of which roles governing bodies naturally gravitate toward:

1. Representative–Constituent Advocate.
2. Strategic Vision.
3. Trustee–Steward.
4. Decision-maker.
5. Community Builder.
6. Oversight.

Then they are asked to discuss what roles they feel they should focus more on to enhance effectiveness. The

There is a dance that managers must do with their elected officials as they navigate the curved and blurry line between politics and administration.

.....

following is the collective distribution of which roles governing bodies feel they should focus on to be (even) more effective:

1. Strategic Vision.
2. Community Builder.

3. Trustee–Steward.
4. Representative–Constituent Advocate.
5. Decision-maker.
6. Oversight.

The challenge for managers is to support the governing body in each of the roles to enhance effectiveness. Figure 3 allows us to see the juxtaposition of a few key elements of this ranking. Generally speaking, Representative–Constituent Advocate is the number-one role that elected officials naturally gravitate toward and Community Builder is number five. When asked where to focus to enhance effectiveness, Community Builder jumps to number two, and Representative–Constituent Advocate moves to number four. Finally, the Oversight role is the lowest rated role in both scenarios.



FIGURE 2.

Roles that Elected Officials Most Gravitate Toward

- Representative–Constituent Advocate
- Decision-maker
- Strategic Vision
- Community Builder
- Trustee–Steward

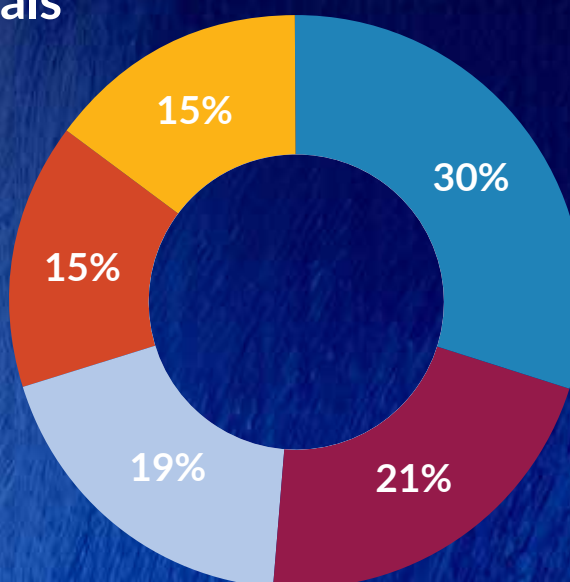




FIGURE 3.

Which roles elected officials naturally gravitate toward...

Representative–Constituent Advocate
Strategic Vision
Trustee–Steward
Decision-maker
Community Builder
Oversight

What roles elected officials want to pay MORE attention to...

Strategic Vision
Community Builder
Trustee–Steward
Representative–Constituent Advocate
Decision-maker
Oversight

The Activities

A quick summary of activities associated with each role is shown in Figure 4.

The reality for our elected officials is that there are times when these roles are in opposition to one another. Residents may be asking the council to vote a particular way on an issue because of how that decision impacts them in the moment, but the

Trustee–Steward will consider long-term implications and perhaps make a different decision. When discussing this tension at a council retreat, one councilmember described this as a mindset they take on when considering important decisions: “If I think of our residents, the voters, my neighbors as my customers, then I am their customer service; but when I think of

According to Nalbandian, “Win-lose politics have no place if community building is the goal.”

• • • • •

them as owners, then I am their trustee.” The trustee is duty bound to make decisions in the best interest of the community, even despite “customer” opposition to do so.

The Community Building role deserves special attention since there is noticeable separation from actual and desired ranking. As elected officials think about moving the needle on their own

FIGURE 4.

Roles	Associated Activities
Strategic Vision	• Strategic Planning • Determining what is important in the short term • Identifying community wants and needs • Seeing interconnections
Representative–Constituent Advocate	• Answering calls and emails from residents • Connecting residents with the local government to help resolve issues
Trustee–Steward	• Looking at the long-term implications of decisions • Fiduciary role
Decision-maker	• Reading briefing materials • Participating in study sessions • Listening to residents • Voting
Community Builder	• Being present and listening to individuals and community groups • Convening important community conversations • Celebrating accomplishments • Participating in events
Oversight	• Conduct the manager’s performance evaluation • Reviewing the audit

performance as a governing body, they see the Community Building role as a potential pathway. Parks, gathering areas, community centers, and town squares are physical spaces we can build and maintain that allow people to gather and be connected to their neighbors. Programming those areas with special events and celebrations encourages people to engage directly with the local government and the community. Convening conversations about important community issues are also an opportunity to reinforce that the local government cares about the events and issues

facing the community and wants to hear from residents. The balance, of course, is to create an environment for true civil discourse. Many of our traditional methods of getting public input, such as public hearings where people get three minutes to state their opinion, are not consistent with community building—or even real engagement. Community Building is deeper. According to Nalbandian, “win-lose politics have no place if community building is the goal.” Given the divergence between the actual role a governing body gravitates

toward and their desired role, the question is, how do we do this? What can the manager and staff do in this supporting role to help the governing body achieve the best for their community? Our practical experience as consultants and managers suggests the following:

1. Intentionally plan for opportunities for the governing body to fulfill each role, and create a time at council meetings where councilors can share their recent activities in the community. This publicly encourages councilors to reach out.

2. Create systems for efficiently addressing constituent concerns so elected officials can turn these issues over to the staff and not feel like they must be the ombudsman for the public, while at the same time, receiving credit for staff responses.
3. Refer to strategic plans and long-range goals when executing programs and projects to create connections between the daily work of the organization and the priorities of the elected officials. This could mean connecting agenda items

directly to governing body priorities.

4. Discuss both short- and long-term consequences of action (or inaction).
5. Support the governing body in establishing ground rules for civility and mutual accountability.
6. Demonstrate accountability to the governing body by updating them on the status of agreed upon priorities and ensuring a meaningful process exists for performance evaluations.

In Gaithersburg, Maryland, there is a long tradition of strategic planning, financial stewardship, civility, and community engagement. When Tanisha Briley became their city manager, her job was to build on this foundation and “level up” organizational performance. “The challenge was to take an already high-performing governing body and integrate new elected officials into the best part of the governance culture,” she said. “We did that by intentionally talking about the importance of working well together to achieve results and refreshing the strategic plan so the council was connected and committed to the long-term goals of the city.”

A Cautionary Conclusion

As was stated in the beginning, management is a supporting role and while their primary focus is the complexity of service delivery issues, fulfilling that role means supporting the governing body in each of



Of the hundreds of elected officials we've worked with, only two governing bodies felt it was most important to focus on their Oversight role to improve effectiveness and, in both of those situations, the manager moved on within the year.



theirs. It must be intentional and the manager must be in tune with the priorities of the elected officials and be effective in translating those into administrative/service delivery decisions. We have facilitated governance conversations with dozens of governing bodies and hundreds of individual elected officials. Only two governing bodies felt it was most important to focus on their Oversight role to improve effectiveness and, in both of those situations, the manager moved on within the year.

Accountability is an important part of being a local government professional and builds trust between the governing body and the administration. However, it is equally important to support the governing body in achieving their objectives. This ensures alignment between “politics and administration” and creates a collaborative mentality that can foster aspirational goals for the community. **PM**

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professor emeritus in the School of Public Affairs and Administration at the University of Kansas, prepared hundreds of students for careers in local government, and also served for eight years on the city council of Lawrence, Kansas, including two terms as mayor.



BY KEL WANG

Building the Best Relationship with Your Council

Take an active role in shaping your council's role and effectiveness.

Many municipalities embrace the council-manager model, where the council is the governing body setting overarching directions and policies, and the manager (and the rest of the administration) is responsible for execution, operations, and the details.

In a perfect world, there is a fine line between the council and the manager, and they collaborate, complementing and supporting each other. However, sometimes there are examples where the council focuses on operational issues, or on their own electoral districts, showing little interest in other areas of the community, or they are divided or even polarized on issues. In cases like these, the lines of responsibility blur: little or no direction is given to the manager; conflicting instructions are given to the manager and administration, resulting in confusion; and there is no way to address and resolve community concerns or issues.



How can you build a collaborative and complementary relationship between the council and yourself, so that the council operates at the strategy and policy level, where they can provide the most value to the administration and the community? Here are three questions to ask yourself, along with a few tips, to help you create a more effective and positive dynamic.

1. Do Members of the Council Understand the Context?

Your community just had an election. What was the turnover on your council? How many of them are new to municipal politics and to the role of being a “director” on the “board” of a public sector organization? In the last municipal election in Edmonton,



of the 13 seats available, five were new members of the city council. Each had varying degrees of governing experience. The administration hosted a series of orientation sessions for all members, not just the new ones, featuring strategic issues facing the city. We began with the overarching strategy. Through conversation exploration, all councilors increased their understanding of the municipal context and their roles in those issues.

2. What Is the Council's Role in Developing the Strategy?

Using Maslow's hierarchy of needs¹ as an analogy, members of any council also have different needs. The "basic needs" include ensuring compliance, reviewing financial reports, and managing performance of the manager. Developing and approving the strategic plan (the strategy) represents the higher-order, "fulfilling needs."

Research by McKinsey involving 772 directors in private sector organizations found that directors who undertake "the basic" functions versus undertaking the higher-impact functions (i.e., fulfilling functions) report their activities have a low to moderate impact on their companies.² While similar research hasn't been done in the public sector, we did have an opportunity to test this in Edmonton when the council developed its strategic plan. To help

meet their "fulfilling needs," it was important to engage council throughout the strategy development process. Here are a few examples of the touch points where we leveraged opportunities for councilors to be involved and add value:

- **Setting the direction.** In an earlier article, a funnel approach was described that allows the council to create and approve the future state of the city.³
- **Making the decision.** The strategic plan outlines the collective vision of the community, not just the administration's. Therefore, approving the strategy is one of the most important decisions any council makes.
- **Prioritization.** If everything is important, then nothing really matters. Setting and approving the administration's corporate business plan helps outline priorities for the next four years to achieve the community's (and council's) 10-year strategic plan.
- **Oversight.** Annual progress reports were reviewed with the council. Measures with high-risk results were shared in detail to explain the performance and to discuss improvement actions.

The council played an integral role in the strategy development and reporting processes. While it is still too early to conclude the ultimate impact of their involvement, the administration's approach was often publicly praised by councilors.

3. Do Members of Your Council Think and Act Like Owners?

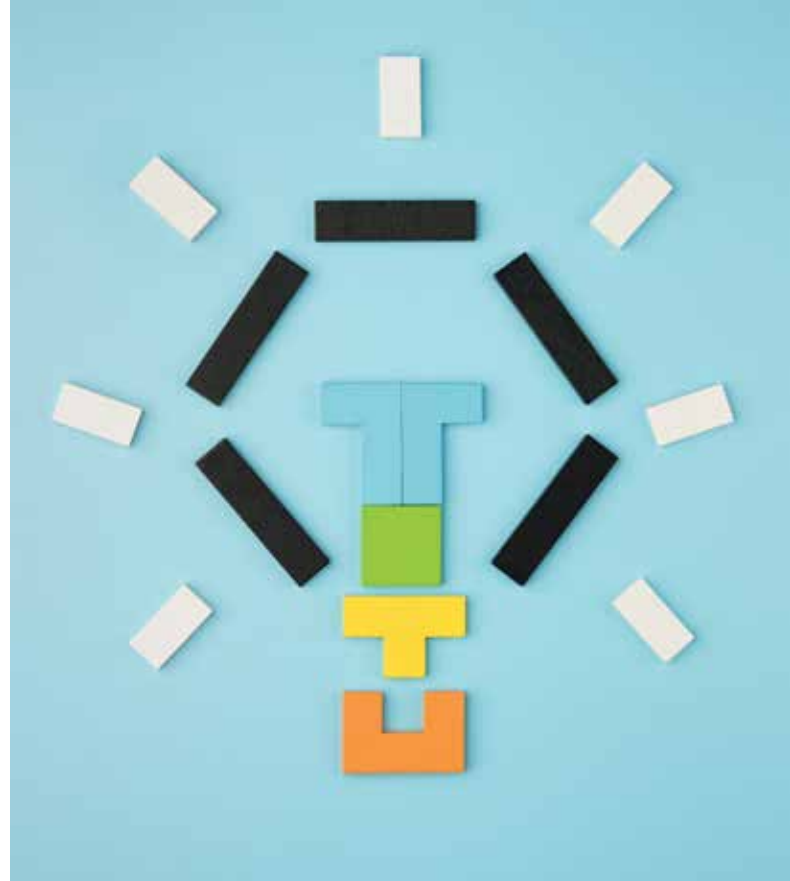
Members of the council are elected officials representing the will of the community. By default, the strategic plan, a plan for your community, is also their plan. So it is important for them to think

IF EVERYTHING IS IMPORTANT, THEN NOTHING REALLY MATTERS. SETTING AND APPROVING THE ADMINISTRATION'S BUSINESS PLAN HELPS DEFINE PRIORITIES.

and act like owners to ensure the long-term viability and prosperity of the community.

What constitutes the mindset of being an owner? In addition to having the passion to serve the community and take responsibility for community issues and solutions, it also includes the following three components that are usually overlooked:

- **Promote and partner.** The local government plays an integral role in building the community, but the role sometimes varies depending on the issue. Having the owner mindset while promoting means communicating the strategic plan actively with other public or private organizations and promoting shared outcomes, while partnership explicitly means the local government does not have to take the driver's seat in all community issues. It is okay to collaborate, to support, and to enable by focusing on shared outcomes and on where the local government can add the most value.
- **Take a community perspective.** Elected officials are elected by electoral districts. By nature they represent those districts. But often they also make decisions that affect the entire community, as in the case of the strategic plan for the entire municipality. Having the owner mindset means wearing two hats, and knowing which one is the right one at the right moment. They can only own the community plan by taking on the community perspective.
- **Be disciplined.** Being disciplined is about having the courage to say "yes" to projects, services, or programs that are unpopular in your community; and/or say "no" to projects, services, or programs that are inconsistent with the intentions of the strategy. Here in Edmonton we saw councilors leverage various means to communicate on a controversial decision. By using evidence, councilors were able to demonstrate the long-term value and importance of building and extending the light rail transit system, recognizing the short-term challenges identified by the community. This project was a key strategic action within the



strategic plan, providing a sound platform for moving forward, despite objections in some quarters.

Managers, It's Really Up to You

You are the manager of your organization, a career public servant. Over the course of your career, you have worked your way up, likely in a few different organizations. The bottom line is that you are informed and educated on issues and you take a holistic (community) perspective. It is really up to you to take an active role in shaping your council's role and effectiveness.

Developing the strategy has always been complex and it becomes more so with your council's increased involvement. Yet this form of strategy development, when done well, is invaluable. It leads to clearer strategies with greater buy-in and ownership from your elected officials and offers an opportunity to strengthen the council-manager relationship. **PM**

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ENDNOTES AND RESOURCES

¹ https://en.wikipedia.org/wiki/Maslow%27s_hierarchy_of_needs

² April 2013 McKinsey Global Survey

³ "Strategic Planning Revisited," by K. Wang and M. Sambir, *PM Magazine*, February 2020. <https://icma.org/articles/article/strategic-planning-revisited>

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I want to thank Michael Sambir and Vida Ramos for making this article as simple and clear as possible.

A Better Way

THE FACILITATED CAO PERFORMANCE REVIEW

A mutually beneficial evaluation process that provides city/county managers with meaningful feedback from their elected officials

BY DAN KEEN, ICMA-CM (RETIRED); AND JAN PERKINS, ICMA-CM (RETIRED)

Meaningful feedback is a gift. It is critical to effective leadership and in ensuring that a city manager's actions align with the elected officials to whom they report.

But the performance evaluation process is not an easy one in any setting. For city managers, city attorneys, and other top appointees in local government, it can sometimes be quite difficult to get practical and helpful feedback from their elected officials. Governing body members often find the process time-consuming, cumbersome, and not particularly effective.

There is a way for the annual performance evaluation process to be easier, more useful, and helpful for

everyone involved, where the appointee receives specific feedback and clear goals: the *facilitated* evaluation. A third party manages the evaluation process, acts as a neutral party to gather data from elected officials (and sometimes from the manager's or appointee's colleagues), analyzes the data, and presents the findings to the manager in a way that encourages growth.

The facilitated evaluation presents opportunities for both the elected officials and the executive to engage in a useful exercise. The elected officials have a way to candidly and thoroughly offer their individual feedback, with the governing body then reaching agreement as a whole on goals and expectations.

For Elected Officials

For city councils and other governing bodies, the facilitated evaluation process offers many benefits:

1. It professionalizes the process.

Most elected officials aren't trained in performing employee evaluations. Even for those who do them at work, the process of evaluating an executive appointed by a governing body is very different, given the multiple elected officials in a public agency instead of just one supervisor in other settings. Councils also turn over regularly, so often there are members who haven't been through an evaluation process yet. The facilitated evaluation brings consistency and professionalism to the process.

2. It values all opinions.

Often in a council-led evaluation, one or two voices come to dominate the discussion. A facilitator can structure the process so that everyone's opinions are given equal weight and can be expressed in a thoughtful, reflective setting, rather than in a group discussion that can meander or become contentious.

3. It makes the process easier.

In a mayor- or council-led evaluation, elected officials not only have to consider and compose feedback, but they must also manage all aspects of the process. With a facilitator, one person is responsible for managing the evaluation



For city managers, city attorneys, and other top appointees in local government, it can sometimes be quite difficult to get practical and helpful feedback from their elected officials.

from start to finish, and the board or councilmembers can concentrate on formulating useful feedback for the manager.

4. It creates clarity.

For some councils and governing bodies we've worked with, members have never had a chance to consider the appointed official's role in executing their expectations. The facilitated evaluation allows councilmembers to share with each other how they perceive the manager's role and consider views

other than their own. Often a much richer and more nuanced picture of the council's vision emerges when they have a chance to consider the manager's role and performance.

For Managers (and Other Appointed Executives)

The facilitated performance evaluation also helps executives:

1. It results in meaningful feedback.

Working for multiple councilmembers means multiple opinions. This kind

of evaluation includes the important step of analyzing and synthesizing the feedback so the manager gets a clear picture of how the council as a whole sees the manager's work.

2. It clears the air.

When the facilitator has a background in local government (which is helpful), the facilitator can point out little things gathered in the process that the manager can attend to. For instance, in one evaluation we performed, the manager had not personalized his office at all, and it led a few councilmembers to wonder whether the manager was committed to the job. The facilitator advised the manager to hang some family photos and bring in some professional mementos as soon as possible, and a potential point of ongoing doubt was removed.

3. It separates the message from the messenger.

When a councilmember makes a pointed criticism of a manager during an evaluation, it can sting. But when the same criticism is presented as a data point in a comprehensive evaluation report, it often feels less personal and more actionable.

4. It focuses on opportunities.

When structured correctly,

the evaluation is a forward-looking process, focused on aligning the council's expectations with the manager's performance. The best processes are results-oriented, increasing collaboration and contributing to the success of both the manager and the governing board.

It can be helpful when the evaluation includes a 360-degree assessment, with staff offering feedback. Managers can learn some important things by hearing from their direct reports. This can be done either through interviews or a survey instrument.

Additional Considerations

A word of caution: Numbered rating systems are popular for performance evaluations. Whether you use a facilitator or not, a numbered rating system is never helpful. Evaluating someone's performance is a complex process, and reducing it to a scale of 1 to 5 helps neither the evaluated nor the evaluators. Some people are "hard

graders" and others just check the top box. Some will use it to avoid providing specific, meaningful feedback. In our experience, rating systems reduce the amount of feedback provided to the manager, and often produce a muddled and confusing result without clear direction to the manager.

Is there a downside to facilitated performance evaluations? Some elected officials may balk at paying for a process that they believe they can do themselves. But given the significant investment that governing bodies make in their managers, the number of staff and budgets that managers are responsible for, and the importance of assessing and correcting course as needed, the cost of facilitation is minimal when considered alongside the benefits. In fact, it can create huge cost-savings from avoiding breakdowns in the council-manager relationship, which could result in premature departures of the manager, terminations and significant expense for severance payments, and legal costs.

In our experience, overwhelmingly the elected officials and managers walk away pleased by the ease and efficiency of the facilitated process, and eager to use the results to achieve greater things. Many councilmembers have also expressed the desire that all future evaluations be conducted with a facilitator's

help, recognizing that it is a key to a successful council-manager relationship.

Conclusion

The goal of the performance evaluation is to provide the manager or other top appointee with meaningful feedback. It is a minor but important investment of resources to ensure that the council and manager are in alignment, and that they are working in sync on behalf of the important policy and program objectives of the community. A facilitated process is an efficient way to assist the council and manager in conveying the gift of meaningful feedback that is not only needed but deserved by a council appointee. **PM**

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The facilitated evaluation brings consistency and professionalism to the process.



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TWO-WAY RESPECT

Elected officials and professional managers, along with their working relationship, are critical to the essence of local government.

BY GEORGE B. CUFF

There is a great line in the movie *In the Heat of the Night* that has actor Sidney Poitier responding to racist sheriff Rod Steiger by saying, “They call me Mr. Tibbs!” The flash of anger arises from a confrontation over what constitutes as evidence and the fact that the sheriff cannot believe that this Black detective could have thought of an angle he missed and thus tries to undermine the latter’s credibility.

The core reason this relationship fails so frequently, and at considerable cost, lies in the inadequate respect both parties have for their counterparts.

This small vignette from a classic movie underscores much of the failure that I have witnessed in the council-manager relationship over the past 40 years. While I might write about other points of failure and shortcomings, the core reason this relationship fails so frequently, and at considerable cost, lies in the inadequate respect both parties have for their counterparts.

Does a manager think that it is easy to become elected? Try it! There are a lot more nuances to being a candidate for office than might meet the eye, and the grind of going door to door is not something to be glossed over. Every candidate for mayor needs to know his or her community and its history, challenges, needs, and sources of pride, as well as what makes it a community in the eyes of the residents.

Candidates are required to speak with passion and commitment to the role even without having had the benefit of experience in public office. Each legitimate candidate must be capable of discerning what has worked well for their predecessors and what has undermined success. Being able to address specific questions pertaining to tax rates, laws, ordinances, organization structures, and the powers of administrators requires at least a modicum of understanding of these topics so as to avoid the embarrassment of offering glib answers at an election forum.

The Other Side of the Coin

The candidate for office who does not understand or respect the education and experience of her or his city manager will also struggle both as a candidate and as a newly elected official. The office of mayor is seldom handled well by someone who does not appreciate the depth of experience and education that his or her manager possesses, or the breadth of work-related challenges of being the senior person in charge of making certain that all systems function when and as expected.

There is a vast array of duties that municipal managers and their direct reports face on a daily basis. Their to-do list can range from an economic development decision in one moment to a major infrastructure issue the next; from a rezoning application and a very demanding developer, to a young mother who cannot afford a season pass for leisure facilities for her six children. The manager needs to be able to manage senior-level egos while nurturing newcomers to public life. On top of those administrative challenges and a host of others, the manager

has a cast of elected officials, all of whom expect quick answers to their questions and efficient responses to public demands. In addition, the manager must establish a sound relationship with the new mayor, whose expectations might be as broad as his or her experience in such matters is shallow.

At the Core

Each of these roles is distinct and each has its own challenges. Neither will function as expected without the respect and support of the other party, both of whom are critical to the essence of local government. (This is true regardless of size of municipality or its geographic location).

Respect should be evident at the outset and should be a foundational element in the relationship between those appointed to office and those elected.

While the roles of both parties are vastly different, the convergence of them will not be smooth without the requisite degree of respect.

This should not be a difficult proposition to understand, and yet, based on a wide range of experience, it does not seem to take long

before members of a council begin to question and/or undermine the legitimacy of their manager and department heads as though they as elected officials, with very little relevant experience, could do a better job. Further, because councilmembers often have deeper resumes and professional qualifications, they may chafe at the orientation advice that suggested that “no, their expertise is neither expected nor desired.”

Over the years, I have noted that those administrators who have best discerned these very distinct roles often refer to their elected counterparts by their new titles and not by first names; the latter makes it sound like “we are all in this together,” whereas the use of titles indicates that “I respect you” and your new and elevated status. Simple matter? Perhaps. Like Virgil Tibbs, the character played by Sidney Poitier, a matter of respect (and distinction), I think so. **PM**

GEORGE B. CUFF, FCMC,

is president of George B Cuff & Associates Ltd.

He has taught in the ICMA University program over the past 10 years on the topic of “Fatal Flaws of a Council-Manager Relationship” and on the need for a solid “Council-Manager Orientation.” George has a background as a municipal manager and as a mayor, elected four times and serving 12 years in that capacity.





HELP
WANTED,
PART 2:

THE RAPIDLY CHANGING ROLE OF HUMAN RESOURCES

Optimizing your organization's people practices in today's shifting workplace

BY PATRICK IBARRA

In the June issue of *PM*, I penned the first part of this two-part series—"Help Wanted, Part 1: Turning Your Workplace into a Talent Magnet." In Part 2, I concentrate on the rapidly changing role of the human resources (HR) department.

Does the HR department in your agency have a job or a role? Is their focus on results or rules? Is their objective to reach outputs or achieve outcomes, and if it's the latter, what are those desired outcomes? In today's environment, workforce performance is more important than ever, which makes the effectiveness of HR practices a top priority. The risks associated with not optimizing your organization's people practices in today's shifting workplace is way too high not to refocus your time, energy, and attention on adopting and implementing contemporary HR practices.

During the pandemic, your HR staff were on the front lines as internal "first responders" adapting telework policies, establishing and enforcing medical protocols for employees, and attending numerous webinars to stay abreast on the latest developments and their impacts on the workplace, to name just a few. Oh, and they

"Your organization's most precious resource isn't money, it's time. On what are your people spending their time?"

– Patrick Ibarra

were somehow responsible for maintaining high levels of employee engagement throughout your organization and ensuring the remote workplace culture of operating departments was healthy and productive. To say the role of HR is elastic is a vast understatement.

Burnout among employees at all levels in a number of fields is at record highs—in particular, for those serving in HR roles. I recommend you read the recent article "Putting Out the Fire," published by the Society for Human Resource Management to gain insight into how the pandemic has impacted your HR staff members and what can be done to alleviate their ongoing stress.¹

Before starting my consulting firm in 2002, I served as a city manager and as a director of human resources for a municipal government for several years. Consequently, I have a deep appreciation for those in HR who at times struggle to shifting roles between being an advocate while simultaneously ensuring compliance with agency policies and procedures. I've met a large number of dedicated, forward-looking HR professionals who choose every day to help your employees realize their potential and contribute to your organization's success.



In recent years, the human resources function in both business and government has been under intense scrutiny. You've probably seen articles with titles like, "Why We Love to Hate HR." As the pace and sweep of change intensify, HR professionals are coming under unprecedented pressure to be innovative, to be strategic, and to implement their programs and initiatives more efficiently.

Undoubtedly, the time is perfect to jettison the notion that HR is your agency's "party planners" and "employee morale fixers." Their role is much more than organizing social events and solving other departments' workplace culture issues. The responsibility of your directors overseeing operating departments has to be beyond being proficient in delivering services and emphasize their role in building a modern workforce.

Examining HR

Change before you have to instead of because you have to.

—Patrick Ibarra

Traditionally, the role of human resources has been limited to administrative functions such as recruitment, payroll, and benefits administration. HR departments are increasingly being mobilized to

In today's environment, workforce performance is more important than ever, which makes the effectiveness of HR practices a top priority.

.....

offer organizations more than transactional services. Organizational change involves moving from the known to the unknown. The question is "change to what?" HR is at a critical juncture: Should it try to hang on to the past and risk becoming marginalized, or should it embrace a new and different future that requires a different portfolio of services, and along with it, compatible employee competencies? Either way, there is a clear

and unambiguous imperative confronting the HR professional to rethink the HR function's strategy, structure, services, and programs and address how it can add value to today's organizations. Can HR transform itself alone? Absolutely not. In fact, the primary responsibility for transforming the role of HR belongs to the agency's top administrator—city or county manager for municipal governments—and to every line manager (i.e., department director).

In his book *Human Resource Champions*, HR management educator and consultant David Ulrich speaks of a new vision for HR, "that it should be defined not by what it does, but by what it delivers—*results* that enrich the organization's value to customers, taxpayers, and employees." What exactly does this mean? It means that HR's value should be defined as the contribution it makes to organizational effectiveness and not simply by historical measures that don't gauge effectiveness like employee turnover.

The following comes from the IPMA-HR report published in 2020, “Shifting Perspectives: A Vision for Public Sector HR”:

The HR profession exists in a disruptive world; volatile economies, environmental impacts, rapid changes in technology, and the changing needs of the workforce require HR professionals to think differently about how to shape the organizations that deliver services to citizens. The unprecedented speed of change is not likely to slow, but to increase, and it is critical that future-focused strategies are developed now in order to meet the challenges and opportunities ahead.²

By the way, this report was published before the pandemic so add “internal first responder” to the seemingly never-ending list of duties for their role.

The authors of the aforementioned report, actual HR professionals from a range of public sector agencies, offer the “purpose of creating a compelling case for moving beyond transactional HR to transformational HR, while also providing a path to success with practical ideas and suggestions for consideration.” The framework in their report provides the opportunity for engaged dialogue and action. Focusing on the areas of leadership, culture, talent, technology, and communication through the lenses of innovation, business acumen, and strategic orientation will enhance the contributions of your HR department.

Undoubtedly, there’s an abundance of opinions about the role of Human Resources in your organization. Therefore, I highly recommend your entire executive leadership team read this report and hold an in-depth discussion about its application to your agency.

Of course, directors of operating department should not impose the new agenda on the HR staff. Rather, they should confer with HR leaders and managers to form a partnership and completely reconceive and reconfigure the function to overhaul it from one devoted to activities to one committed to outcomes.

Attracting and Building a Modern Workforce

If you always do what you’ve always done, you’ll always get what you’ve always got and often that’s not good enough.

—Patrick Ibarra

It is not the sole responsibility of your HR department to hire employees. Maintaining a modern workforce is an organization-wide imperative and consequently requires organization-wide horsepower.

People want more from their employers. Job seekers want flexibility, well-being, and purpose on top of competitive pay, good working conditions, and skill development. Recruiting is more than just scouting for talent. In addition to attracting and finding the right people at the right time, it includes building a strong employer brand, successfully bringing new hires onboard, and taking steps to retain top talent.

About branding, it’s not your organization’s logo; it’s your reputation. Employers must work toward their brand being

The new vision for Human Resources is to transition away from what it does to what it delivers—results that enrich the organization’s value to customers, taxpayers, and employees.

.....

hyper-focused on what workers want and delivering on that promise. Your recruitment messaging should be speaking to the needs of today’s workforce, showing your agency is putting people first. Is your agency known as a workplace where people go to grow or go to stop? HR can do all the social marketing depicting your agency as a forward-looking workplace that attracts top talent, but if that’s incongruent with the actual experience that new (and for that matter, existing) employees have in their department, well, that’s a bit of a problem, don’t you think? Once again, I want to emphasize the role of operating departments in fortifying your employer brand.

Let’s examine minimum qualifications, often referred to as MQs. Before you post a vacancy (and please refer to my “Help Wanted, Part 1” article on proven and practical tips, tools, and techniques on modern ways of sourcing candidates), I suggest you examine the MQs for the position you’re trying to fill. Often, I find MQs to be stale and from a bygone era. This includes candidates possessing prior government experience. The predictive value of a candidate having government experience for them to succeed in your agency is thin at best. Be careful about falling for a candidate’s pedigree, and for that matter, stop hiring for personality; instead focus on performance. Again, the correlation is limited between a person’s personality and their being successful. Be careful about being caught up in using personality tests for hiring and promotion. They’re all self-assessments and only of a person’s tendencies and not their behaviors. Keep in mind that behaviors are the choices we make and are based on our values, attitude, skills, and knowledge. In short, behaviors affect performance.

Sometimes your HR department feels the need to control all aspects of the hiring process by sitting in on every interview of external candidates. This is not only highly inefficient, but drives hiring managers in your operating departments off their hinges. The rub here is the trust between the HR department and other departments regarding the compliance segment of the interview process. You know, what questions you can’t ask in an interview. I recommend that your HR departments at least once a year provide a “hiring bootcamp” for all new and seasoned supervisors and managers in which the content of the workshop is not just an update on the legal aspects of hiring, but also concentrates on the “fit” for your organization. Do you hire for experience or potential? How important is being curious to being successful in your agency, and if so, how are you evaluating it during the interview process? I believe that creativity is the new currency of success and creativity is the direct result of one’s imagination, which is the outcome of one being curious.

A systematic and effective onboarding process is especially critical in order to reduce early attrition and accelerate the performance of your new employees. Let me be clear: HR can have a fabulous onboarding process for new members joining your organization, but once that employee shows up to their respective department on their first day, how robust is that onboarding process? Organizational leaders should be asking each of their department directors to report out on their onboarding process for their new employees and you might discover serious opportunities for improvement. The same principle applies to processes related to your agency's performance appraisal system, learning and development opportunities, and promotional practices. While those dimensions may be overseen by your HR department, operating departments exercise their own discretion in administering those HR policies and practices.

Similar to your finance and legal department(s), human resources is about minimizing risk. Of course, there is a natural tension between your HR department and operating departments about minimizing that risk with a strong focus on compliance and consistency. HR sometimes takes the position that if you can't do it for every employee, don't do it for anybody, which can sometimes suffocate your organization, while operating departments go to the other extreme and exercise so much discretion that every situation is an exception to the rule.

HR Strategy

Execution is the Strategy. —Patrick Ibarra

A strategic plan should be developed to help HR match its goals and capabilities to the anticipated demands of the external environment and internal customers. Action plans should be established to support the implementation of the strategic plan, including action steps/tasks, persons assigned, and timetable. The emphasis on preparing a strategic plan is critical to (re)define the roles that HR intends to play in the organization.

According to contemporary practices of successful HR departments, HR job descriptions should include:

- **Operational Excellence:** Providing functional expertise to the organization that is strategic and leading edge.
- **Creativity:** Developing breakthrough thinking to internal customers.
- **Accountability:** Being responsible, taking risks, and ensuring that commitments are delivered with speed and accuracy.
- **Quality:** Raising the bar and ensuring that organizational and individual performance improves day to day, month to month, and year to year.
- **Teamwork:** Collaborating and building the relationships across all areas of HR and the line organization to deliver responsive solutions.

How Healthy Is Your HR Department?

Organizations often have a junk food diet and a drug habit. Their favorite junk food is software and favorite drug is money. —Patrick Ibarra

My firm has completed organizational assessments of several government HR departments, and our team provides a series of recommendations to modernize the role of HR. I want to provide it to you as a checklist as you reimagine your HR department:

- Adopting a strategic focus to provide direction when transitioning from a transaction-based operation to a strategic partner approach.
- Determining which services are best provided by the HR department, while other services are delivered by other departments and outside resources.
- Creating an organizational structure consistent with the effective delivery of HR services and programs.
- Assessing the need for policy updates and revisions needed to improve efficiency and legal compliance.
- Accelerating the use of technology to accelerate delivery of services, including internal operations.
- Implementing targeted steps to improve recruitment and selection services, including resetting the employer value proposition and employer brand, to expeditiously create deep talent pools of candidates.
- Instituting a comprehensive and results-based training program consisting of technical and non-technical, competency-based workshops for leaders, managers, and supervisors.
- Determining an effective succession planning approach to counter retirement trends while ensuring high-quality agency services and programs.
- Recommending results-based HR metrics.

Overall, we help strengthen the relationship between the role and services provided by the HR functions and the results that organizational leaders' desire.

The functions supporting HR services have the opportunity to achieve greater outcomes. The opportunity exists for your leadership to pivot toward a high-performing organization comprised of well-trained staff members, serving in a cooperative and appreciative culture, providing valuable services to operating departments all with the support and advocacy of credible leaders. The new vision for the HR department is to transition away from what it does to what it delivers—results that enrich the organization's value to customers, taxpayers, and employees.

In closing, please attend the ICMA sponsored webinar I'm presenting on Thursday, October 13th in which I focus on the rapidly changing role of human resources. **PM**

ENDNOTES AND RESOURCES

¹ <https://www.shrm.org/hr-today/news/hr-magazine/spring2022/pages/hr-practitioners-are-coping-with-burnout.aspx>

² <https://www.ipma-hr.org/stay-informed/research-and-reports/hr-2020-report>

PATRICK IBARRA and his consulting firm, the Mejorando Group, are passionate about unleashing human potential (patrick@gettingbetterallthetime.com).



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- Strategic Planning
- Town-Gown Relations
- Working with Unions

Roger Kemp's background and professional skills are highlighted on his website. Dr. Kemp was a city manager in politically, economically, socially, and ethnically diverse communities.

He has written and edited books on these subjects, and can speak on them with knowledge of the national best practices in each field. Call or e-mail Roger for more information.

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This month we bring you a double Member Spotlight featuring a brother and sister who are both city managers!

**Aram Chaparyan,
ICMA-CM**

City Manager
Torrance, California
ICMA Member since 2015

Reflecting on my 21-year career, one of the major highlights is the establishment of the management system program.

Through the years, I always made sure to be an advocate for professional development and attracting young talent into our industry. This year, with the support of our council, we initiated a management system program similar to a fellowship, where individuals will be able to rotate within city departments for two years, giving them the opportunity to hopefully compete to obtain full-time employment in our sector. Establishing this program will really help in the legacy of service, which I'm very proud of at the city of Torrance.

As much as you explain to someone what a city manager does, it's not the same as a lived experience.

When it comes to work-life balance, it's incumbent upon us to lead by example. I make sure to take time off when reasonable and I have a great team that I can rely on. Behind every one of us there's a partner, a spouse, a child, a parent, that's real and outside of work. I really embrace my role as a parent, and I make sure that I make a point to share with my team that they too should use their time off.

The common bond among ICMA members is the willingness to serve.

The renewed enthusiasm and hope are what gives you the energy to come back and to go another year, to get through the budget cycle or a council election, and to know that you're not alone. We're part of this broader network that we're all tied to by our commitment and it's reassuring to know that there are people who are genuinely committed to public service.





Arminé Chaparyan

City Manager

South Pasadena, California

ICMA Member since 2015

Earlier in my career, my biggest challenge was being able to relate to others in our industry...

And finding peers who looked like me, sounded like me, and had a similar journey. Unfortunately, there weren't too many faces that resembled a first-generation immigrant entering the public sector and going on this journey to become a city manager. The good news, though, is that in the last 20 years our industry has really changed the way we function. Now more than ever, there are people who the new generation can relate to who come from different backgrounds. Diversity has really helped shaped a path for the new folks entering our industry.

The greatest highlight of my career has been the ability to help create a profession that I'm very proud of...

And now being able to help develop the next generation and pay it forward. That's something I truly take pride in and as a city manager, it's something that I fundamentally want to instill in the organization I'm working in and the next level of talent that we're attracting to our industry.

ICMA conferences have been a huge learning opportunity.

Usually, I'll go through the list of sessions and attend those that are completely outside of my usual comfort zone. Every time I attend the Annual Conference, I come back with so many new ideas. I love the direction that ICMA is heading. At this point you don't have to be at a higher level to join ICMA, it's actually better to join when you're first entering the industry because it provides such a greater network, exposure, and ability learn from your peers.

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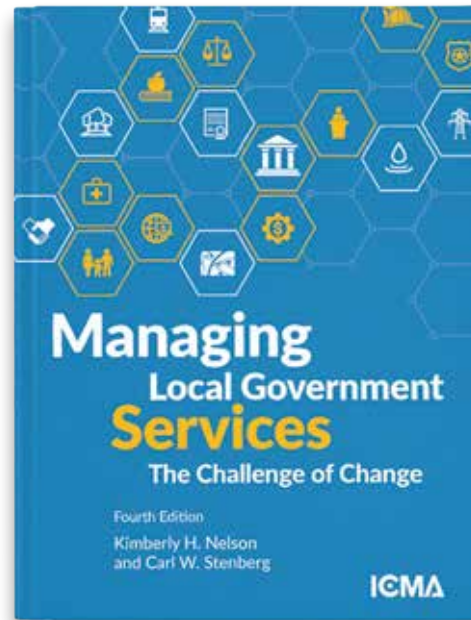
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