

The ICMA logo is displayed in white text on a dark blue rectangular background. The background of the entire top half of the cover is a vibrant, abstract mosaic of blue, orange, and yellow geometric shapes, creating a sense of depth and movement.

ICMA

ICMA SENIOR ADVISORS PROGRAM MANUAL

July 2024

ICMA | senior advisor program

ABOUT ICMA

ICMA, the International City/County Management Association, promotes professional local government through leadership, management, innovation, and ethics. ICMA provides member support; publications; data and information; peer and results-oriented assistance; and training and professional development to more than 13,000 city, town, and county experts and other individuals and organizations throughout the world. The management decisions made by ICMA's members affect millions of individuals living in thousands of communities, from small villages and towns to large metropolitan areas.

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Acknowledgment and Thanks

In January 1973, Wes McClure, the city manager of San Leandro, California, and ICMA Vice President, wrote a letter to Mark Keane, the executive director of ICMA. In the letter McClure explained his idea for a new program of volunteers in public service. A key element of the program was to provide managers who were about to retire with an opportunity for continued public service to the profession. According to McClure, "The value of the system is that it would make use of the abilities of experienced administrators whose talents would otherwise be wasted." Wes' vision resulted in the creation of the ICMA Range Rider program in 1974 to make the counsel, experience, and support of respected, retired managers of the profession available to city and county managers and administrators with Wes being the very first Range Rider. All Senior Advisors since are grateful to Wes.

In 2013, a Range Rider 2014 Advisory Committee was appointed by ICMA Executive Director Bob O'Neill to celebrate 40 years of the program and to enhance its value to ICMA members and to state associations in the second century of ICMA. Several of the adopted recommendations reinforced current guidelines and some involved changes and/or greater clarity. The committee, and others who provided feedback, urged a change in the name from Range Riders to Senior Advisors to better describe the role and its primary emphasis on providing members with advice and support.



Introduction to the ICMA Senior Advisor Program

The ICMA Senior Advisor program was established by the ICMA Executive Board in 1974 as the ICMA Range Rider Program to make the counsel, experience, and support of respected, retired managers of the profession available to members. There are currently 115 Senior Advisors and 30 state partners.

Senior Advisors are retired managers with extensive experience who volunteer their time to provide a unique source of outside advice to their colleagues. They are selected jointly by the state sponsor and the ICMA Executive Director. Although they are expected to be visible, accessible and responsive to members and association needs, Senior Advisors are unpaid volunteers who pursue other activities while in retirement and thus are not “full time.” Expenses incurred are reimbursed and shared by ICMA and the sponsoring state organization. The expenses allocated depend on the size of the state, the number of Senior Advisors, and funds available from the sponsors.

Senior Advisors are available to meet with members in their states or areas to discuss the profession and their concerns as members. Discussion topics range from relations with elected officials, overall management questions, relations with ICMA, responses to local

controversies such as referenda on the council-manager plan, to career development.

All discussions are on a **confidential** basis. Senior Advisors are friends, colleagues, and advisors to the profession—not consultants. The Senior Advisor program is designed to help with personal and professional issues, not to provide technical assistance or solve substantive problems in a local government. However, Senior Advisors may consult with local governments as individuals, on a part-time basis, if the consulting does not impair their effectiveness as an advisor. Program guidelines contain advice for Senior Advisors who do part-time consulting.

Senior Advisors may also help communities interested in creating a professional local government management position, including adoption of council-manager government.

Members with questions on the Senior Advisor program can contact Senior Advisor Program Coordinator and Florida Senior Advisor **Pam Brangaccio** at **727-204-8095** or e-mail pbrangaccio@icma.org. Members can also contact **Rosalyn Ceasar**, Senior Program Manager at **202-962-3544** or email rceasar@icma.org.

Senior Advisors Program Guidelines

The following guidelines set forth the purpose of the program and provide guidelines for each of the key program participants—Senior Advisors, state sponsors, and ICMA—and provide structure for the program nationwide while recognizing the differing needs among the individual states. Details of the program can be found in the remaining sections of the ICMA Senior Advisor Program Manual and by contacting the ICMA Senior Advisor Program Coordinator and Florida Senior Advisor Pam Brangaccio at pbrangaccio@icma.org. Members can also contact Rosalyn Ceasar, Senior Program Manager at rceasar@icma.org.

A. PURPOSE OF THE SENIOR ADVISOR PROGRAM

The program is a partnership between ICMA and state sponsors to help address the personal and professional needs of individual members. Personal support is the program's primary activity. Assistance to governing bodies, charter commissions, and community groups on the form of government is the second priority.

B. SENIOR ADVISOR QUALIFICATIONS

1. Must have retired from local government and is a member in good standing of ICMA, and the state sponsor upon appointment and while serving as a Senior Advisor.
2. Served a minimum of ten years as the appointed CAO of a local governmental jurisdiction OR have had at least ten years' management experience as an Assistant/Deputy CAO.
3. Must be age 55 or older.
4. Be a resident of the state at the time of appointment.
5. No longer works in a full-time capacity.

Senior Advisor Expectations

1. Be willing to actively participate in the program

for the duration of the appointment (see section C Senior Advisor Responsibilities and Guidelines).

2. As a member of ICMA, you commit to adhering to the ICMA Code of Ethics and will also follow the ICMA Senior Advisor Program Guidelines and the state sponsor's Senior Advisor Program Policy.
3. Submit quarterly reimbursement requests to the state sponsor by the fourth day of the following month (January 4, April 4, July 4, and October 4).
4. Submit quarterly activity reports by the fifteenth day of the following month (January 15, April 15, July 15, and October 15).
5. Maintain an active phone number and email address that can be published.

C. SENIOR ADVISOR RESPONSIBILITIES AND GUIDELINES

1. Serve as a volunteer advisor, following retirement from in-service local government employment, to support the state sponsor and ICMA members
2. Reach a mutual understanding with the state sponsor on the amount of time (at least 10 hours a month) that will be available to devote to the program and what expenses will be reimbursed per ICMA Guidelines.
3. Follow up when alerted to members in crisis.
4. Contact and welcome new CAOs in your state.
5. Regularly contact all CAOs in your designated region by phone, email, or in person on a schedule agreed upon and publicized by the state sponsor. It is important to reach out
6. Maintain membership in ICMA and with the state sponsor and advocate membership in both organizations to nonmembers.
7. Stay current on ICMA's and state sponsors' programs and services to help members make good use of available resources.

8. Uphold the high standards as embodied in the entire ICMA Code of Ethics. The primary mission of Senior Advisors is to serve colleagues and to represent the profession.
9. Be sensitive to the appearance of conflict of interest in considering part-time consulting jobs. Consult the *Avoiding Conflicts of Interest* section of the Senior Advisors Manual for permissible consulting activities, and when in doubt, contact the state sponsor for guidance.
10. Submit quarterly activity reports and expense reports within the stated timeframes to the state sponsor using the standard formats. (See [Appendix D](#)).
11. Attend the state sponsor annual meeting and any other meetings designated by the state sponsor. Attend ICMA's annual conference when possible, especially when the conference is in the Senior Advisor's ICMA region.
12. Engage in at least 15 hours of professional development activity each year in order to stay abreast of current issues relevant to members. This can include activities such as conference attendance or reading a book.
13. Be easily accessible by phone and email.
14. If asked to aid local governments in recruitment and selection of a CAO, consult the *Assistance to Local Governments in Recruitment of a Manager/Administrator* section of the Senior Advisors Manual and contact the state sponsor for guidance.

D. GUIDELINES FOR ICMA

ICMA maintains policies, goals, and guidelines for the program and conducts periodic reviews in consultation with key stakeholders. The most recent review was conducted in 2020-2021. ICMA also provides a Senior Advisor Program coordinator to encourage and assist with establishing programs, to advise on policy, to share information on policies and procedures in other states, and to maintain regular communication with Senior Advisors.

When establishing a program, ICMA and the Senior Advisor Program Coordinator will:

1. Provide materials on starting and maintaining a Senior Advisor program.
 2. Assist state sponsors in drafting appropriate policies and guidelines for their state. See [Appendix A](#) for a Recommended State Sponsor Senior Advisor Program Policy.
 3. Provide a list of Life and retired members in a state to help identify potential new Senior Advisors.
 4. Announce new Senior Advisor programs in coordination with the state sponsor and find ways to give Senior Advisors more national visibility.
- When maintaining a program, ICMA will:
5. Pursuant to a mutually agreed upon budget, share expenses equally with the state sponsor. (Note: Should a Senior Advisor be asked to spend more than a day at any particular local government during a visit or to undertake a special project for the local government, reimbursement for travel and per diem will be covered by the local government and not the state sponsor or ICMA.)
 6. Provide a timely response to state sponsor requests for approval of new Senior Advisors.
 7. Provide a sample form that state sponsors can adapt for the periodic Senior Advisor performance review. This is conducted to ensure program effectiveness and that all parties are meeting the expectations as outlined in ICMA's program guidelines and the recommended State Sponsor Senior Advisor Program Policy. (See [Appendix C](#)). Share examples of review processes from other states when requested.
 8. Provide Senior Advisors with ICMA business cards using the names of both sponsoring organizations. (See [Appendix H](#) for instructions on ordering business cards).
 9. Provide regular communications on ICMA activities and the profession to keep Senior Advisors up to date on current developments in the field of professional management.
 10. Provide complimentary registration for ICMA webinars and conferences.
 11. Provide complimentary registration to Senior Advisors at the ICMA Annual Conference and organize a meeting for those in attendance. Encourage conference attendance by including a contribution to hotel expenses for Senior Advisors attending from the ICMA region in which the annual conference is held.
 12. Provide a list of members in transition via the ICMA web site and include new MITs in the *ICMA Leadership Matters* newsletter, if the MIT wants his or her transition status announced.
 13. Conduct a periodic assessment of the Senior Advisor Program.



E. GUIDELINES FOR STATE SPONSORS

When establishing a program, the state sponsor will:

1. Adopt the recommended State Sponsor Senior Advisor Program Policy (see [Appendix A](#)) tailored to the specific needs of the sponsor. This includes guidelines for Senior Advisors clearly stating program goals, expectations, and the responsibilities of Senior Advisors and the state sponsor.
2. Select a qualified, skilled, and experienced individual or individuals who are eager and committed to participate. (See [Appendix E](#)).
3. Establish a budget for the program. Annual expenses can range from approximately \$500 to \$2000 per Senior Advisor, depending on the area covered and the activities of the Senior Advisor.
4. Designate one individual who is responsible for coordination and access to the state sponsor board. **This is a key component for a successful Senior Advisor program.**
5. In most states this is provided by the association secretariat, usually in the state league or a university.
6. Contact ICMA, who in addition to the state sponsor, approves each Senior Advisor. Also provide the budget that you have established and that ICMA is asked to match. ICMA will then execute a letter of agreement. (See [Appendix B](#)). At this time, ICMA will coordinate with you on announcing the new program to your members.

When maintaining a program, the state sponsor will:

1. Review and approve Senior Advisor expenses and submit to the designated individual **at the ICMA offices**. Reimbursement of expenses will be contingent upon submission of proper documentation. State sponsors should reimburse Senior Advisors promptly and bill ICMA for 50 percent of the amount paid. ICMA operates on a July 1 – June 30 fiscal year. Reminders are sent to state sponsors each quarter and again in May requesting that all reimbursements for the final quarter be submitted by early July.
2. Review Senior Advisor Activity Reports on at least a quarterly basis to the **ICMA Senior Advisor Program coordinator**.
3. Provide regular communications on state sponsor activities; include Senior Advisors in statewide listservs.
4. Arrange a periodic meeting or conference call with all Senior Advisors in the state.
5. Encourage members to take advantage of the Senior Advisor program. For example, send congratulatory communications to all newly appointed managers copying the appropriate Senior Advisor. Include an explanation of the purpose of the Senior Advisor program and the name, address, email address, and telephone number of his or her Senior Advisor.
6. Notify Senior Advisors of members in crisis and those whose employment has been terminated.
7. Find ways to increase program visibility. For example, solicit articles from Senior Advisors for

publication in your state newsletter. Publishing the names of the Senior Advisors, and information about the goals and achievement of the program is the easiest way to gain visibility and broaden support among members. Also, recognize Senior Advisors on appropriate occasions, such as at a state conference and at board meetings.

8. Provide complimentary registration and expense reimbursement for Senior Advisors to attend annual state meetings. Define which other meetings Senior Advisors are expected to attend.
9. Advise ICMA of Senior Advisor vacancies due to retirements or other reasons. Recommend Senior Advisor candidates for joint appointment.
10. Conduct a performance review with each Senior Advisor on the schedule established in the state's Senior Advisor Program Policy. (See [Appendix C](#)). To facilitate conversations on mutual expectations, ICMA's recommended policy encourages an initial appointment of one year for new Senior Advisors with a performance review after that first year, and if performance is acceptable, then two-year reappointments with a performance review at least every two years to discuss how things are going. There can also be a limit on the total number of years a Senior Advisor can remain in the program. A maximum number of 10 years is recommended. The initial and subsequent reviews should be based on clear expectations/criteria outlined in the state's Senior Advisor Program Policy.
11. States have the option to confer emeritus status to those Senior Advisors who wish to retire from the program or who have performed in the role for many years. ICMA does not provide financial support or oversight for those in emeritus status.

F. PART-TIME EMPLOYMENT AND AVOIDING CONFLICTS OF INTEREST

Senior Advisors, as retired professional administrators, possess skills that may be marketable after leaving full-time employment. This marketability can contribute significantly to the good of the profession, and it can offer opportunities for the Senior Advisor to benefit from gainful employment and to pursue professional interests. The Senior Advisor program recognizes such marketability and its opportunities. Assumption of a Senior Advisor position, however, includes an obligation to commit a minimum level of time and availability to

the program and to conform to ethical standards as embodied in the entire ICMA Code of Ethics.

The following guidelines are provided to assist both the Senior Advisor and the state sponsor to avoid conflict of interest, in fact or appearance, and to facilitate consistency throughout the program.

1. Senior Advisors may engage in part-time consulting or comparable professional activities as private entities, or sole proprietors or as an individual corporation such as a limited liability corporation. They may also engage in teaching, consulting, or interim service with state agencies, quasi-public entities, local governments, or regional agencies. Retired administrators who commercially advertise as consultants are not eligible for Senior Advisor appointment
2. Any consulting or other activity should be part-time, intermittent, or on a short-term basis to permit the Senior Advisor to carry out active and responsive program responsibilities. Should a paid engagement limit or become limiting to the performance of Senior Advisor duties, the individual should balance the engagement against resigning as a Senior Advisor so as not to impair the program.
3. Senior Advisors may be employed by a consulting firm on a part-time basis or as an independent contractor if the focus of the work is on providing technical expertise on individual projects and there is no responsibility for soliciting business or for client development/maintenance for purposes of future business. Any interim full time position should not exceed 3-6 months.
4. When consulting or comparable professional services are provided to a local government for compensation, the services should not include those provided under the Senior Advisor program. Such an engagement should be by invitation of the local government in contrast to solicitation by the Senior Advisor.
5. When a Senior Advisor is unclear about how these guidelines apply to a situation, the Senior Advisor should contact the state sponsor or the Senior Advisor Program coordinator at ICMA for guidance.
6. A state sponsor may establish conflict-of-interest guidelines that further clarify or restrict these national guidelines but may not negate or lessen their effect or intent.

G. ASSISTANCE TO LOCAL GOVERNMENT IN RECRUITMENT OF A MANAGER/ ADMINISTRATOR

In some states, Senior Advisors individually help identify candidates and advise on the recruitment process for communities, especially small ones, which have chosen not to use a search firm. Any involvement is up to the state sponsor, but that assistance should not include involvement in the final selection process except perhaps in exceptional circumstances to maintain the integrity of the position. The following statement of policy is provided to clarify any Senior Advisor involvement in placement work:

1. Senior Advisor involvement in placement work for a local jurisdiction should be the exception rather than the rule as the main focus of the Senior Advisor Program is member support and advocacy of the council-manager form and other forms of professional local government management. Generally, placement work is best handled by a search firm or by the jurisdiction on its own, especially in cases where there are divided governing bodies or there are complex local issues. In cases where a jurisdiction lacks resources and seeks the assistance of the Senior Advisor Program in a placement process for the chief administrative officer, basic guidelines are presented below. If the recruitment is for an interim/acting administrator, the Senior Advisor should first make members in transition aware of the opportunity.
2. Senior Advisor placement assistance to a local jurisdiction may include some or all of the following items:
 - a. Discussing the placement process with elected officials at public meetings. This includes the option for a jurisdiction to use a search firm.
 - b. Providing information to the local governing body on the benefits of seeking an experienced public manager or assistant, preferably an ICMA member.
 - c. Working with the local governing body on determining position requirements, KSAs (Knowledge, Skills, Abilities) and compensation.
 - d. Working with the jurisdiction to prepare a position summary and advertisement based on local charter or code provisions.
- e. Reviewing resumes and application materials and assist the local jurisdiction in developing a list of those applicants meeting the requirements set forth by the governing body. Note: if more than one Senior Advisor is involved with the application review process, the Senior Advisors should be aware of any restrictions in state law that might prohibit discussion outside the public meeting.
- f. Assisting the local governing body in developing the interview process.
- g. At the request of the governing body, facilitating the selection of the finalists for interview. The local governing body is solely responsible for selection of finalists for interview purposes. This should be done in accordance with applicable state or local laws regarding open meetings.
3. What the Senior Advisors **SHOULD NOT** do in a placement process is:
 - a. Perform background checks on candidates.
 - b. Be involved in the interviews of the applicants or the interviews and selection of the final candidate by the governing body.
 - c. Offer to serve as or accept permanent appointment as chief administrative officer, if involved with a placement project for jurisdiction.
 - d. Be involved in negotiation of terms of employment for the selected candidate.

Senior Advisor Ethics Scenarios

Senior Advisors are permanently retired or no longer in service to a local government, who are required to adhere to principles of the profession as expressed in Tenet 1 (a commitment to professional local government management and democracy) and Tenet 3 (honesty and integrity) of the ICMA Code of Ethics. All members in service to a local government, whether it is on a full-time, part-time, or interim basis must follow all 12 tenets of the Code.

Advice on some common challenges Senior Advisors may encounter follows:

1. **I have been asked to assist a community by interviewing candidates for a local government management position. What is your advice?**

A Senior Advisor is allowed to assist the local government in advising, developing, and facilitating



the process. The Senior Advisor serves all members equally. To achieve this outcome as the manual provides, Senior Advisors should not participate in interviews, perform background checks, be involved in the selection of the candidate, or assist in the negotiation of employment terms.

2. **I am interested in pursuing volunteer service and have been specifically asked about unpaid appointed positions in local and regional government. I am considering appointment to the affordable housing trust or the regional planning agency that makes decisions based on city-adopted positions.**

Serving on a regional entity

A Senior Advisor may serve and vote as a board member based on expertise on matters that advance the region's interests. The Senior Advisor may do so even if a local government's elected officials may object to the board's vote on a particular matter.

By their very nature, regional entities often must set aside the interests of a single entity for the benefit of the region. When the board's vote may run contrary to a particular local government's request, a call to the local government manager to discuss the matter demonstrates professional respect and can be productive for continuing the relationship.

One role of board members in this capacity may be testifying at the state legislature or offering public comments advocating for a position. As it

relates to this role, the Senior Advisor would want to consider whether his or her participation runs contrary to the Senior Advisor's role. Advocating or speaking publicly for a position where a local government manager may be on the opposite side of the issue runs the risk of violating the expectation that Senior Advisors "refrain from direct or indirect public criticism of any member and to uphold the standards of the profession as embodied in the ICMA Code of Ethics."

Since there are other board members who can advance this role, the advice is to remain in the background on advocacy unless there is unanimous support from the managers in the region. It is critical Senior Advisors do not use professional expertise and standing to create any issues or undermine colleagues when they are advocating for their community.

Serving on the Affordable Housing Trust in a Senior Advisor's home community

There may be an inherent conflict for the Senior Advisor to serve as the primary point of contact with the manager in his or her home community. What if the manager is seeking and getting confidential advice from the Senior Advisor on an issue or the manager offers a recommendation the Senior Advisor, as a resident of the community, disagrees with on the issue?

It would be best to serve in the appointed role on the Housing Trust while assigning Senior Advisor

responsibilities in the hometown to another Senior Advisor. This creates a conflict of interest firewall between the role as a resident serving on a decision making entity and the role as a Senior Advisor.

Ethics staff are available for a confidential conversation to offer advice about a specific scenario involving any Senior Advisor.

3. My immediate family member approached me about being involved in their development ventures on a part-time basis. What is your advice?

The ethics concern is to ensure the member is not working in some capacity where there may be interactions with members as a Senior Advisor and for the business.

If the member's role was to represent the business before a local government or work with staff, this could create a conflict that damages the reputation of the Senior Advisor program so this member could not be a Senior Advisor.

4. I am a long-tenured manager in my community who retired 6 months ago. I agree with a candidate

running for elected office at the local level and want to contribute to her campaign. What do you recommend?

As the Senior Advisor manual states, "Uphold the high standards as embodied in the ICMA Code of Ethics. The primary mission of Senior Advisors is to serve colleagues and to represent the profession. Senior Advisors should avoid participating in elections at the local level and should avoid taking a stance on controversial issues unless they act in concert with the state sponsor. Before participating in any political activity at the local, state or national level, Senior Advisors should consult with state sponsor leadership to seek their guidance and permission to proceed."

Ethics staff recommends not contributing to this campaign because it would undermine the ability to offer politically neutral advice to members of the profession as a Senior Advisor. If there are any questions about a Senior Advisor's ethical obligations, contact the state sponsor and ICMA for further guidance on this topic.



APPENDIX A

Recommended State Sponsor Senior Advisor Program Policy

[NAME OF STATE SPONSOR] SENIOR ADVISOR PROGRAM STATEMENT OF POLICY

I. PURPOSE

The purpose of the Senior Advisor Program is to make the counsel, experience, and support of respected, retired managers of the profession available to individual members. The program is designed to help with personal and professional issues and not to provide technical assistance nor to solve substantive problems in a local government.

II. APPOINTMENT OF SENIOR ADVISORS

A. QUALIFICATIONS – A Senior Advisor shall have the following qualifications:

- A resident of [State] at the time of appointment.
- At least ten years' experience as an appointed Chief Administrative Officer (CAO) and/or an Assistant/Deputy CAO in local government.
- A willingness to actively participate in the program for the duration of the appointment.
- A commitment to follow the outline of responsibilities for Senior Advisors and the ICMA Senior Advisor Program Guidelines and Manual.
- Be a member of ICMA and the [State Sponsor] at time of appointment and maintain such memberships during service as a Senior Advisor.
- Have an active phone number and email address.

B. APPOINTMENT PROCESS – The following process shall be used for the appointment of Senior Advisors.

- Creation of an open position by the [State Sponsor] Board of Directors through the declaration of a vacancy because of the departure of an incumbent or by expanding the total number of Senior Advisor positions.
- Notice of any vacancy shall be given to all [State Sponsor] members, who then shall be given 30 days from the date of notice to recommend candidates to apply or to recommend others to the [State Sponsor] President. Potential candidates shall be requested to submit a letter of interest and a resume. The final selection process shall be determined by the Board of Directors.
- Appointments shall be made jointly by the President of the [State Sponsor] with concurrence of the [State Sponsor] Board and the Executive Director of ICMA.

C. TERM OF APPOINTMENT

- The appointment shall be for an initial term of one year. A review is then conducted to assess whether expectations for the Senior Advisor and for the sponsors are being met. Senior Advisors must continue to meet the program's qualifications to be considered for reappointment. Reappointment can be made for up to two

years with a review conducted at least every two years. Any one of the three parties may end the appointment upon written notification to the others.

III. OUTLINE OF RESPONSIBILITIES FOR SENIOR ADVISORS

- The Senior Advisor is encouraged to make contact by phone, email, or in person with each member within his/her assigned area as practicable or suitable on an annual basis.
- The Senior Advisor is encouraged to contact, within the Senior Advisor's assigned area, each newly appointed manager and assistant manager within one month of notice of appointment; and is encouraged upon notification to immediately contact each member in transition within the Senior Advisor's assigned area.
- The Senior Advisor is expected to provide confidential counseling to all ICMA and [State Sponsor] members on personal and professional issues when invited to do so by a member within a 48-hour response time if at all possible.
- The Senior Advisor is expected to offer support upon request in a private manner directly to members who may be experiencing problems with their elected officials.
- The Senior Advisor is encouraged to attend at least one meeting or social event annually of the managers' group within the Senior Advisor's assigned area.
- The Senior Advisor is expected to attend the annual [State Sponsor] conference.
- The Senior Advisor is expected to refrain from direct or indirect public criticism of any member and to uphold the standards of the profession as embodied in the ICMA Code of Ethics.
- The Senior Advisor shall provide, at least quarterly, a statement of expenses along with a report of activities to the [State Sponsor] secretary who shall then forward the same to the [State Sponsor] President and ICMA Senior Advisor coordinator.
- As requested, assist in recruitment of ICMA and [State Sponsor] members and other joint activities and programs with ICMA.

IV. SENIOR ADVISOR EXPENSES

- Each year the [State Sponsor] Board of Directors shall determine eligible expenses and approve an annual budget for the Senior Advisor Program. Any changes to the budget should be communicated to ICMA.
- Eligible Expenses may include:
 - Automobile travel at the current IRS mileage rate.
 - Transportation, meals, lodging, and registration fees while attending managers meetings and the [State Sponsor] Annual Conference.
 - ICMA Annual Conference attendance.
- Procedure for Expense Reimbursement
 - Senior Advisors shall send the request for expense reimbursement along with a report of activity required in Section III to the [State Sponsor] Secretariat.
 - The [State Sponsor] shall submit, at least quarterly, a request for 50% reimbursement to ICMA using the form provided by ICMA.

V. OUTSIDE ACTIVITIES

- Senior Advisors may engage in part-time consulting or comparable professional activities as private entities and/or sole proprietors. They may also engage in teaching, consulting, or interim services with state agencies, quasi-public entities, local governments, or regional agencies. Such part-time activities shall be in accordance with ICMA Senior Advisor Guidelines. Senior Advisors shall advise the President of the [State Sponsor] before

accepting any consulting agreement with a local government. In no instance shall a Senior Advisor accept a consulting assignment with a community without the expressed consent of the senior ICMA or [State Sponsor] member at the same entity.

- Senior Advisors may engage in interim manager positions and shall notify the state President before acceptance of any such position. Such an assignment should not detract from the Senior Advisor's attention to his/her Senior Advisor responsibilities
- Retired administrators who commercially advertise as consultants are not eligible for Senior Advisor appointment. Senior Advisors may be employed by a consulting firm on a part-time basis or as an independent contractor if the focus of the work is on providing technical expertise on individual projects and there is no responsibility for soliciting business or for client development/maintenance for purposes of future business.

VI. SUPPORT FOR AND REVIEW OF SENIOR ADVISOR PROGRAM

- The [State Sponsor] Board of Directors shall serve as the Oversight Committee for the Senior Advisor Program and accepts by reference the ICMA Senior Advisor Program Guidelines.
- The [State Sponsor] Board of Directors shall review this Statement of Policy and all aspects of the program at least every two years and shall meet with the Senior Advisor at the [State Sponsor] annual conference to discuss the Senior Advisor Program. At least every two years there shall be a formal review and assessment of the performance of all parties in meeting their responsibilities and expectations.
- The [State Sponsor] President shall recognize the contributions of the Senior Advisor at the annual meeting of the association.

VII. APPROVAL OF AND AMENDMENTS TO THE STATEMENT OF POLICY

- This Statement of Policy shall become effective upon majority vote of the [State Sponsor] Board of Directors.
- This Statement of Policy may be amended using the same process as with its original approval.

APPENDIX B

Sample ICMA/State Sponsor Agreement

JOINT SUPPORT OF SENIOR ADVISOR PROGRAM

This letter of agreement sets forth the understanding between ICMA and _____ () as to their joint support of a Senior Advisor program for the state of _____.

Term of Agreement: This agreement shall be for a period through June 30, 20___. It shall be automatically renewed unless canceled by either of the parties, which may be done at any time with 60 days written notice to the other.

Adherence to ICMA Senior Advisor Program: ICMA and _____ agree to adhere to and follow the policies outlined in the *ICMA Senior Advisor Program Manual* and may establish other mutually acceptable and beneficial expectations regarding the implementation and assessment of the effectiveness of the program.

Appointment of Senior Advisor: A specific person or persons will serve as a Senior Advisor (s) of this program only if jointly appointed by the Executive Director of ICMA and the president of the state sponsor. The initial term of the appointment shall be for one year. Reappointment can be made for up to two years with a review conducted at least every two years. Any one of the three parties may end the appointment upon written notification to the others.

Reimbursement of Expenses: The maximum total amount to be expended by the two sponsors shall be reviewed annually, starting with the date of appointment of each Senior Advisor. For the first year, the maximum amount shall be \$ _____, to be shared equally between the two sponsors. The addition of future Senior Advisors and increases in budget will be mutually agreed to by both ICMA and the state sponsor.

Reports: The Senior Advisor will submit at least quarterly written reports to the designated state representative along with the statement of expenses.

Outside Activities: Nothing in this agreement will preclude an individual appointed as Senior Advisor to engage in teaching or consulting with state agencies, quasi-public entities, local governments, or regional agencies as long as conflict of interest, as defined in the *ICMA Senior Advisor Program Manual*, is avoided.

President

Date

Executive Director, ICMA

Date

APPENDIX C

Performance Review

To ensure that the Senior Advisor Program is of high quality and of continuing value, it is important periodically to review the performance of the providers.

- It is recommended that the state sponsor conduct a review of its program policy, the program's effectiveness, and the year's activity at a board of directors meeting at least every two years. Senior Advisors should be invited to this discussion.
- In addition, one year after the initial appointment of a Senior Advisor, a review of his/her performance shall be conducted to identify successes and areas for improvement and to determine if the Senior Advisor should be reappointed.
- A sample Senior Advisor Self-Assessment is provided to assist sponsors in establishing a process ([See Appendix J](#)). For illustrative purposes, the list of expectations is taken from the recommended state sponsor policy, however, the actual list should be determined by the state sponsor and the Senior Advisor.
- When it is time for the review process, Senior Advisors are asked to complete a self-evaluation using this form or another developed by the state sponsor, followed by a conversation with the designated state sponsor representative. The Senior Advisor and the state sponsor are encouraged to obtain input from members and others who have had experience with the program to ensure a thorough review.
- If reappointed, a performance review following the same process should be undertaken at least every two years.
- ICMA, as part of the affiliation agreement monitoring process, will review the performance of both partners in support of the Senior Advisor program.

APPENDIX D

Activity and Expense Reports

Senior Advisors are required to submit reports of activities and expenses in formats provided. Both are to be submitted to the state sponsor **with a copy of the activity report only submitted to the ICMA Senior Advisor Program coordinator**. At a minimum, reports are to be provided quarterly, but particularly active states or Senior Advisors might agree on more frequent reports.

Quarterly Activity reports

ICMA and state sponsors require activity reports to:

- Help determine the volume and nature of Senior Advisor activities, which in turn helps determine the overall value of the program and suggestions for improvement.
- Help provide information about the state of the profession to sponsoring organizations.
- Enhance accountability and transparency of the program to the members.

It is important to maintain **confidentiality** in reporting the activities and concerns of members. Senior Advisors should not be reporting anything that would be uncomplimentary or critical of a member or that would negatively affect a member. That would be totally contrary to the main objectives of this program—to help members and professional management.

If a member does not want a Senior Advisor report to include his or her name, the report can simply include the date and the fact that there was contact and nothing more.

Expense reports

Requests for expense reimbursement must be submitted to the state sponsor by individual Senior Advisors and by the state sponsor to ICMA at least quarterly. This allows ICMA to manage the expense reimbursement process and to forecast expenses for its July 1–June 30 fiscal year. Contact your state sponsor for a copy of the summary expense reimbursement form to use. ICMA staff have provided template forms to each state sponsor to help streamline the reimbursement process for ICMA.

APPENDIX E

Tips for State Sponsors on Initiating a Program

- **Developing a formal, written policy establishing the program** (See [Appendix A](#) for the Recommended State Sponsor Senior Advisor Program Policy).

The state sponsor establishes realistic expectations that are consistent with the overall objectives of the Senior Advisor program and the state policy. They should be written in a clear, concise manner and agreed upon by all Senior Advisors in the state. ICMA urges state sponsors to regularly review guidelines to adapt to changing circumstances.

A fundamental issue to consider is the amount of time that Senior Advisors are expected to donate to the program. While this may vary considerably from one individual to another and from one state to another, the state policy should clarify your expectations. Or you may prefer to establish minimum goals for each Senior Advisor to meet.

Additional expectations of Senior Advisors to clarify include:

- In addition to the annual state sponsor conference, which meetings are Senior Advisors expected to attend? Regional meetings? State board meetings?
- What specific expenses will be reimbursed?
- What is the process for submitting quarterly activity and expense reports?
- Who should be notified of each consulting job being contemplated?
- Is assisting local governments in the recruitment for city/county manager positions included in Senior Advisor duties?
- Are interim manager assignments acceptable and, if so, under what circumstances?
- Is holding an elective office acceptable?

Some states have conducted an orientation session for new Senior Advisors, which has been very helpful in clarifying expectations. ICMA can provide a sample agenda.

- **Identifying a skilled, experienced individual or individuals who are eager and committed to participate.**

CAOs or Assistant/Deputy CAOs who have retired from a position in the state are likely to be more readily accepted since they are already known and respected by colleagues. Furthermore, familiarity with your state's form of the council-manager plan and/or professional management positions will enable Senior Advisors to advocate more effectively for professional management in cases of adoption and retention.

Once candidates have been identified, confirm that:

- The candidate is a member of ICMA and the state sponsor. (Absolute requirement).
- The candidate is acceptable to all.
- The candidate understands the expectations and responsibilities of the Senior Advisor position.
- The candidate affirms having read the Senior Advisor Program Manual.
- The candidate has an active and known email address. (Absolute requirement)
- The candidate understands the importance of reporting activities and expenses.

APPENDIX F

Tips for Senior Advisors

Senior Advisors provide valuable services to the associations, their members, and the local government management profession. Welcoming new managers to the state, congratulating managers on their appointments, providing support and advice to the individual member, promoting the value of the state sponsor and ICMA, and serving as a resource to community groups and elected bodies are some examples.

Increasingly, Senior Advisors are being called upon to deal with complex and sensitive issues involving the manager's relationship with the council or other significant persons or groups. Senior Advisors find that the challenges they encounter require many of the same skills they honed as managers—the foremost of which is the ability to listen and help problem solve. Activities include providing support to a manager who is in trouble or is in transition, mediating a dispute between a manager and a council, and providing career counseling.

Senior Advisors may also be called upon to assist an elected board in its consideration of hiring a professional manager for the first time or as a replacement. They may be a resource to community groups and elected bodies on adopting or retaining professional management.

The state's Senior Advisor Program Policy should outline procedures and expectations for your state. Contact your state contact if you need clarification.

Member Support

One of the most important—and most challenging—tasks you will face as a Senior Advisor is keeping the members you serve aware of your availability. Being visible at state organization meetings and other similar gatherings of members is one way to do so. Courtesy calls, emails, or texts to members—especially members in transition—on a regular basis to build trust and confidence are other ways to do so. Introducing a member to a new development, product, or service of ICMA or the state sponsor may be a good starting point for conversation.

To help you engage in personal support, the following 11 tips are suggested:

1. Show an interest in the member's problems.
2. Be a good listener.
3. Be understanding; do not try to affix blame; let the member know he or she has a friend.
4. The main thrust of the discussion should be to help him or her think through the problems and alternate courses of action.
5. Call or visit those who you hear are having problems to let them know that someone cares.
6. Offer suggestions if you can
7. Remember we are not trained, professional counselors. If the member seems in distress, he/she may need professional help. Tactfully and carefully suggest that such help be sought. Sources of such help might be Employee Assistance Programs, government health departments, private counselors, ministers, etc. ([See Appendix I](#))
8. Use follow-up calls when appropriate to find out if things have changed and to show your concern, but do not overdo it.
9. Offer to meet with the member and spouse, if appropriate.

10. If the problem is with the member and council, suggest that sometimes an outside facilitator can be helpful.
11. At times, it might be appropriate to suggest to the member that it is time to move on. Suggest a contact with ICMA to obtain the latest list of openings and to search firms on the Executive Search Firm Directory. <https://icma.org/page/resources-help-search-your-next-executive>.
12. Members in transition are especially in need of support. Make sure they are aware of the resources available to them from ICMA and their state sponsor. <https://icma.org/members-transition-program>

CONFIDENTIALITY

The role of the Senior Advisor is to provide personal and professional support to the member. The Senior Advisor should advise and assure the member that all discussions are confidential. If the conversation is about a supervisor, he or she should be assured that the conversation will not be shared.

If there is a legal issue the member wants to discuss, the Senior Advisor is to affirm he or she will not delve in the particulars of the legal issue. The obligation to be forthcoming about the facts related to the legal issue rest with the member, not the Senior Advisor. Law Enforcement and courts also play their role in determining the facts of the case. The Senior Advisor may inform the member that they consider the discussions to be confidential and that the Senior Advisor will maintain confidentiality unless there is a legal obligation to disclose the information.

CODE OF ETHICS

Regarding a member seeking advice on Code of Ethics matter, the Senior Advisor should not delve into the particulars but advise the member to contact ICMA's Code of Ethics director for guidance. The best advice to the member is to get ahead of the situation and self-report a possible violation to the ICMA director of Ethics.

If a member's inquiry is about an ongoing code of ethics violation investigation, the Senior Advisor should decline any conversation about the particulars and urge the member to cooperate.

Senior Advisors do not serve as potential ethics violation complainants. However, if you learn of an egregious situation involving illegal conduct or if there is a concern for someone's safety, confer with ICMA staff.

Senior Advisors may serve on state sponsor code of ethics fact finding committees if asked.

Membership Development

Senior Advisors should be knowledgeable about the programs of ICMA and the state sponsor. While Senior Advisors are not salespeople and should take care not to be perceived as such, be prepared to answer questions about products and services available through ICMA and state sponsors. It is also helpful to sponsors when Senior Advisors solicit feedback about new initiatives.

As a Senior Advisor, feel free to help nonmembers as well as members of sponsoring organizations. It is recommended that you have ICMA and state sponsor membership applications available so that you can assist a nonmember who asks about membership.

Staying Current

In addition to reading the *ICMA Leadership Matters* newsletter, ICMA Connect, *PM* magazine, and state sponsor publications, Senior Advisors can enjoy such professional development opportunities at their state sponsor conference, ICMA and state sponsor webinars, and the ICMA Annual Conference. In addition to providing Senior Advisors with an opportunity to talk with members, the conferences provide an excellent opportunity for Senior Advisors to be brought up to date on developments in the profession and their associations. Meetings held at the conference provide an opportunity to exchange ideas, concerns, and successes with one another and with the attendees.

Adoption and Retention of the Council-Manager Plan and Professional Local Government Management

If you hear of a community that is seeking information on professional local government management, including adoption/retention of council-manager government or the creation of a position of professional local government management, direct them to Jason Grant, advocacy director, jgrant@icma.org.

Because Senior Advisors often have high name recognition and acceptance due to their experience and knowledge, their advice and assistance is frequently sought by elected officials considering changing their form of government to the council-manager plan or other forms of professional management. You might also be called upon to assist in communities actively seeking to retain the council-manager form of government. In both cases, the local government and all individuals involved benefit from a knowledgeable presentation about the advantages of the council-manager plan. ICMA has a generic PowerPoint presentation available and can customize it with statistics specific to that local government.

In situations where you are called upon to defend the council-manager plan, you will need to confer with the incumbent manager, previous managers, and elected officials to determine why the plan is being challenged. You also will need to familiarize yourself with the ordinance or charter. Can you identify reasons why the charter is not working? Is there a group working to abandon the plan? Why? Is there a group that is promoting the retention of council-manager? Be prepared to discuss your findings and conclusions with the manager and elected officials.

If you are called upon to argue in cases of adoption or retention, you will need to prepare both yourself and your audience. An audience of elected officials, members of the media, and the general public will include individuals who may not be familiar with the complexities of government and the issues. One former Senior Advisor suggested, “Know your audience and the issues and address each with a simple, direct, and factual presentation. Some of the public will misunderstand; some of the elected officials will question; and some of the media will present information in a manner to make it more readable and controversial. As a Senior Advisor and visiting expert, your presentation must reduce these possibilities of misinformation. Some people outside of the profession and government have difficulty with jargon that uses the alphabet, so avoid it. You would be amazed at the people who do not know what ‘ICMA’ is, so say the name in full.”

Before speaking, give elected officials and media representatives the following materials:

- Your business card.
- A brief explanation of the Senior Advisor Program.
- Information on ICMA and your state sponsor, including a brief description of the purpose of these organizations and their importance to professional management.
- Information on the council-manager form of government is available at <https://icma.org/page/council-manager-form-government-resources> (hard copies available from ICMA). This includes materials on establishing a position of professional management other than the council-manager form.
- The ICMA Code of Ethics. <https://icma.org/icma-code-ethics>
- After a brief introduction and argument, devote the majority of the time allotted to answering questions from elected officials and the public. Include the following major points in your discussions on council-manager government. These can be easily adapted if the focus is on another type of professional position:
 - The professional Code of Ethics and its benefit to the community.
 - The similarity between the council-manager plan and the structure of private businesses.
 - The similarity between the council-manager plan and most school board/superintendent structures.
 - The fact that the manager serves as the chief adviser to the council, which makes the final decisions, and that the manager must execute the council's decisions within the laws of the city/county, state, and federal governments.
 - The growth of the council-manager plan in the country and in the specific state.
- The types of problems that confront local government that professional managers are uniquely qualified to resolve. Include, for example, descriptions of the manager's role in administering personnel systems and practices, in developing and administering budgets, and in conducting in-depth analyses and reports on community issues, service delivery problems, and alternative approaches.
- Procedures for recruiting, screening, interviewing, and selecting a manager.

Stress 'ethics.' This appeals to the public, elected officials, and the media. They listen carefully to a summary of our Code of Ethics and its enforcement.

Offer to meet with citizen groups, community service clubs, and charter committees after your presentation. Meet with groups that are for the adoption or retention of the plan to discuss future strategies and offer resources. You might also want to argue your case before groups that are against adoption or retention. Meeting with these groups could allow you to learn more about their specific arguments. You should also make a concerted effort to meet with the media after your presentation; this will allow you make sure you have answered their questions thoroughly and provided them with the information they desire.

Assistance to Local Governments in Recruitment of a Manager

Senior Advisors can assist the community and members by providing the names of members in transition who might be interested in and qualified for the interim assignment. Senior Advisors may serve as interim managers on a limited basis. Because this activity is not usually covered under the regular Senior Advisor duties, approval should be received from the state sponsor and additional compensation should be sought from the local government that is served.

The ICMA Senior Advisor Program Manual provides detailed guidelines on participation in the recruitment process for a permanent manager.

While you may be asked to assist in recruiting and selecting a manager, you should explain the role of search firms. If the local government chooses not to use a search firm, you can help draft an advertisement for publication in the *ICMA Leadership Matters* newsletter and on ICMA's online [Job Center](#).

APPENDIX G

Key ICMA Initiatives/Programs

ICMA's programs and services are many and varied and this appendix provides a sampling of interest to Senior Advisor activities. **Click on the link (below)** to be taken to appropriate sections of the website. ICMA's priority areas can be viewed by clicking links below to be taken to relevant sections of the website.

[MEMBER-IN-TRANSITION ASSISTANCE](#)

A comprehensive range of hard copy and online resources and support are available to members in transition and Senior Advisors, a monthly call-in, a discussion forum, and financial assistance to attend the ICMA Annual Conference.

[ICMA'S CODE OF ETHICS](#)

The ICMA Code of Ethics was adopted by the ICMA membership in 1924, and most recently amended by the membership in April 2023. The Guidelines for the Code were adopted by the ICMA Executive Board in 1972, and most recently revised in June 2023.

Questions regarding the Code of Ethics can be directed to **Jessica Cowles**, ICMA ethics director, jcowles@icma.org.

[PROMOTING PROFESSIONAL LOCAL GOVERNMENT MANAGEMENT](#)

ICMA's origins lie in the council-manager form of local government, which combines the strong political leadership of elected officials (in the form of a council, board, or other governing body) with the strong professional experience of an appointed local government administrator. ICMA also advocates for professional management positions in other forms of government. Resources, including flyers, on professional management are available [here](#).

[ICMA CAREER NETWORK](#)

The Career Network includes the ICMA Job Center with a database of current job openings for local government professionals. It also includes a variety of Career Resource publications such as ***Job-Hunting Handbook***, ***Model Employment Agreement***, ***Manager Evaluations Handbook***, and ***First Time Administrator's Handbook***. In addition there is information on student chapters and on resources for members who teach.

[VOLUNTARY CREDENTIALING PROGRAM](#)

The ICMA Voluntary Credentialing Program is a means of defining and recognizing an individual ICMA member who is a professional local government manager qualified by a combination of education and experience, adherence to high standards of integrity, and an assessed commitment to lifelong learning and professional development.

APPENDIX H

Ordering Business Cards

To order business cards, email LaShawn Cooper (lcooper@icma.org) with the following information as it should appear on the cards (Allow 6-8 weeks for delivery):

Name:

Address:

Telephone:*

Cell phone:

Fax (optional):

Email:

Name of State Sponsor (ex. Colorado City/County Management Association):

*You can include one or two phone numbers.

APPENDIX I

Assistance for Mental Health Issues

[The resource guide begins on the next page.]

NATIONAL RESOURCE GUIDE



Mental Health and Substance Use Disorders

EMERGENCY OR CRISIS

Call 911

National Suicide Prevention Lifeline

Call 800-273-TALK (8255) or Text “help” to 741741

Search for mobile crisis in your home county for an onsite assessment. You may also dial 911 and ask.

DOMESTIC VIOLENCE, ABUSE, AND SEXUAL ASSAULT

National Domestic Violence Hotline

800-799-SAFE (7233) or

800-787-3224 (hearing impaired)

www.draonlin.org

RAINN (Rape, Abuse, & Incest National Network)

800-656-HOPE (4673)

GLBTQ RESOURCES

GLBT National Help Center

888-843-4564

www.glnh.org

Trevor Project Crisis Line-Youth

866-4-U-TREVOR (488-7386)

www.theTrevorProject.org

GLBT National Youth Talkline

800-246-PRIDE (7743)

www.glnh.org/talkline

SELF-HELP RESOURCES

Alcoholics Anonymous

www.aa.org/pages/enUS/find-aa-resources

Narcotics Anonymous

888-GET-HOPE (438-4673)

www.na.org/meetingsearch

Nar-Anon/Al-Anon Family Groups

800-477-6291

www.nar-anon.org/find-a-group

888-425-2666

www.al-anon.org

US Dept of Veterans Affairs

800-827-1000

www.mentalhealth.va.gov/

Cigna Veteran Support Line

855-244-6211

NAMI (National Alliance on Mental Illness)

www.Nami.org

Shatterproof (reducing the stigma of opioid addiction)

800-662-HELP (4357)

www.shatterproof.org

SUICIDE PREVENTION AND AWARENESS

Cigna Suicide Prevention Resources

www.cigna.com/individuals-families/health-wellness/topic-suicide-prevention

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APPENDIX J

Senior Advisor Self Assessment

SENIOR ADVISOR PERFORMANCE REVIEW

Date to Be Completed by _____ and Sent to _____.

Senior Advisor Name: _____ Period of Review: _____

Area(s) Served _____

Duties and Responsibilities: Provide a rating for each applicable expectation: (1) Met; (2) Did Not Meet; (3) N/A

- (a) Contacts or meetings with members in crisis/ members in transition _____
- (b) Attendance at member area group meetings _____
- (c) Contacts with new managers in my area _____
- (d) Contacts with other members _____
- (e) Attendance at statewide sponsor meetings _____
- (f) Attendance at national and regional ICMA events _____
- (g) Participation in Senior Advisor conference calls _____
- (h) Timely reports _____
- (i) Participation / attendance at other events for members in my area _____
- (j) Maintaining awareness of resources for members _____
- (k) Maintaining general knowledge of current issues facing local governments and members _____
- (l) Other: _____

OVERALL PERFORMANCE REVIEW RATING _____

What I am doing that I believe makes me an effective Senior Advisor and that I plan to continue?

What do I plan to change to be more effective?

What can be done by (state sponsor) and ICMA to help me and to make the Senior Advisor program more effective?

Senior Advisor

Date

I agree. Check ____.

I suggest the following for improved performance. Check ____.

State Sponsor Representative

Date



INTERNATIONAL CITY/COUNTY MANAGEMENT ASSOCIATION

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