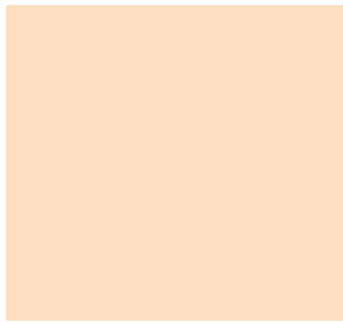


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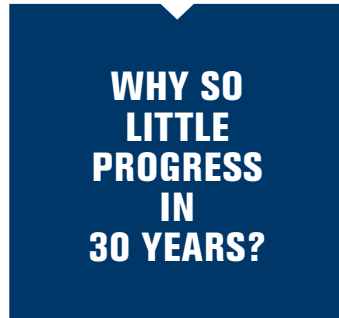
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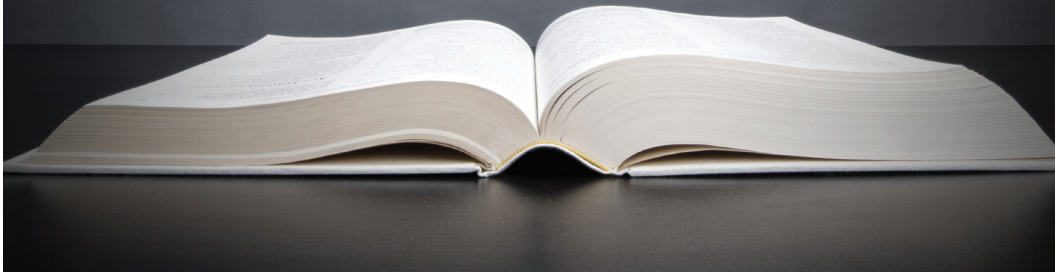
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BY MARTHA PEREGO

MYTHS ABOUT THE ICMA CODE OF ETHICS

Start 2015 with a review



Exist long enough and no doubt myths will develop. Who knows how they get started or why they catch on, but over time, they get repeated often enough and with such authority that they take on a life of their own. Myths spread through the community until they become an accepted part of the legend or practice. Not sinister, just not grounded by facts.

The ICMA Code of Ethics, in existence for more than 90 years, is not surprisingly the subject of many myths. It's time to set the record straight. Here are five common myths that need to be debunked.

MYTH #1: The two-year tenure rule applies only to the manager. The two-year tenure rule is outlined in the guideline on length of service under Tenet 4 of the Code. It notes that "generally a minimum of two years is considered necessary in order to render a professional service to the local government."

That guideline actually applies to all professionals working in any capacity in a local government. And why wouldn't it? After all, every person regardless of their expertise or experience faces a learning curve when they join a new

organization. Getting a thorough understanding of the organization's culture, priorities, and customer needs takes time. So does building the relationships that are crucial to success.

If you want to advance a project, make a difference in the organization, and demonstrate your talent, you need to be willing to commit to the effort. And appreciate the fact that the organization has made an investment in selecting you.

Invest in the upfront research necessary to make sure the new position is the right place for you. Talk with current or former employees about the workplace culture and carefully review the finances. If you are relocating, spend time out in the community to make sure it's a good fit personally.

What to do when things are heading in the wrong direction? Remember that short tenures should be the exception rather than a recurring experience. Under special circumstances, it may be in the best interest of both parties to separate in less than two years.

Examples include refusal of the organization to honor commitments, significant reduction in responsibilities, a vote of no confidence in the member,

PM

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WHEN YOU INFORM YOUR BOSS IS PRIMARILY A MATTER OF PRESERVING A GOOD PROFESSIONAL RELATIONSHIP. THE OUTCOME WILL BE FAR BETTER IF YOU, NOT THE MEDIA, DELIVER THE NEWS THAT YOU WILL BE MOVING ON.

or severe personal problems. Before you head down that road, carefully consider all the alternatives and seek advice from ICMA or a trusted colleague.

MYTHS #2 AND #3: There are two prevalent, competing myths about political activity in retirement. First is that there is a waiting period before a retired manager can run for a spot on the city council or county commission where they worked. Second is that retired members can never run for elected office.

The commitment to political neutrality outlined in Tenet 7 of the Code of Ethics applies only to members who are working for a local government. Tenet 7 requires members to refrain from all political activities that undermine public confidence in professional administrators and to refrain from participating in the election of members of the employing legislative body.

Members who are retired from the profession are required to follow Tenets 1 and 3 of the Code. Tenet 1 requires that retired members be dedicated to democratic local government and to professional management.

Tenet 3 requires that they act with integrity in all personal and professional matters so that they merit the public's respect and confidence. As long as retired members commit to these two principles and respect the role of the incumbent manager, they are free to run for elected office.

MYTH # 4: You have to tell your boss (i.e., mayor, council, manager, assistant manager) when you apply for a new job. You have no ethical obligation to inform your employer when you've decided to look for the next professional challenge.

That assumes, of course, that you plan to meet your stated commitments including tenure and notice.

When you inform your boss is primarily a matter of preserving a good professional relationship. The outcome will be far better if you, not the media, deliver the news that you will be moving on.

MYTH #5: ICMA members aren't allowed to own any property in the community where they work other than their personal residence. This issue is addressed in the guideline on investments under Tenet 12, which cautions members not to invest or hold any investment, directly or otherwise, that creates a conflict with their official duties.

With regard to real estate, the guideline notes that confidential information should not be used to further a member's personal interests. You should avoid purchases or sales that might be viewed as speculation for quick profit. In other words, avoid investments that create a conflict of interest in fact or appearance.

And before acquiring property beyond your personal residence, think carefully about the intersection between your personal investments and your official duties, especially if they are regulatory in nature.

Start the New Year by taking a moment to review the ICMA Code of Ethics and guidelines. It's best to be guided by solid not mythical advice. **PM**



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WHAT'S YOUR FAVORITE PIECE OF LEADERSHIP ADVICE?



CARYN GARDNER-YOUNG

City Manager
Parkland, Florida
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What advice did I receive? From the funny (make sure you put on the same color socks each day), to the serious (understand the politics of your organization). But the best leadership advice I received was from my mentor and that was to be open.

He had worked in government for a long time and had been through many difficult situations. He implored me to be open to new ideas, to communication, and to just being open.

I took this to heart by having an open-door policy, and I am fortunate that employees take advantage of it. We have cry sessions when employees are having personal issues, we have laughs when we cannot believe what a resident just did, and we have serious times when problems need solutions.

I feel the employees are comfortable in coming to see me because I do not sit at my desk. To be a leader, you need to be visible. I am lucky that my organization is fairly small so I can visit offices and employees in the field on a regular basis. That familiarity allows employees to know me and for me to know them.

It always amazes me when I see a smile from an employee when I ask about his or her family, especially when I use family names. The value of employee support to me as the face and leader of the organization cannot be measured.



MARCUS JONES

City Manager
Norfolk, Virginia
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I am the youngest of seven children born to my mother and father in rural Virginia. The best piece of leadership advice I ever received came from my father, Elmore Jones.

My father was a Baptist minister who served several churches, and he had us on the road with him each Sunday. At each church he served in the community or at home with our family, my father was the same person. By word and deed, he actively exemplified the best leadership advice that I have received: Be genuine.

Like my father, I have been extremely fortunate to serve the public. As Norfolk city manager, I run the city's daily operations, which includes overseeing 5,000 employees in a city of nearly 250,000 residents.

In each interaction, no matter how calm or how intense, I follow my father's advice: Be genuine.



FRANK ROBINSON

Town Manager
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A piece of leadership advice that has always resonated with me is from author Ken Kesey: "You don't lead by pointing and telling people some place to go. You lead by going to that place and making a case."

I believe a successful leader must be a powerful storyteller, not only able to see where the organization needs to go but also capable of bringing others along with him or her.

As a leader, first you must have vision. You must go to that place that will best serve your community. Second, you must have the ability to make your case and transform that vision into words, images, and actions. **PM**



1 IMPROVING AFGHANISTAN'S AGRICULTURAL SECTOR

About 80 percent of Afghanistan's population depends directly or indirectly on the country's agricultural sector; yet years of conflict and neglect have left the irrigation and transportation systems broken and the agriculture ministry strained. ICMA is a team member on a USAID-funded program designed to strengthen management capacity in the agricultural sector—improving food security and income generation for Afghans and helping build their confidence in the government.

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QR CODES = TOURISTS?

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3 SAFETY IN THE WORKPLACE

Find out how Goodyear, Arizona, has integrated a culture of workplace safety throughout the organization, including employees, residents, and contractors working within the city.

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LEADERSHIP PROJECTS

4
Members of the Leadership ICMA Class of 2014 worked in teams to complete projects for four communities:

Edmonton, Alberta, Canada (strategic approach to partnerships); Decatur, Georgia (traffic calming efforts); Lee's Summit, Missouri (central building services and vehicle maintenance); and Milton, Georgia (preservation of open space).

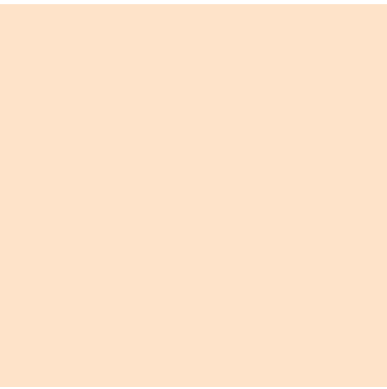
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BY
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AND
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SKAGGS

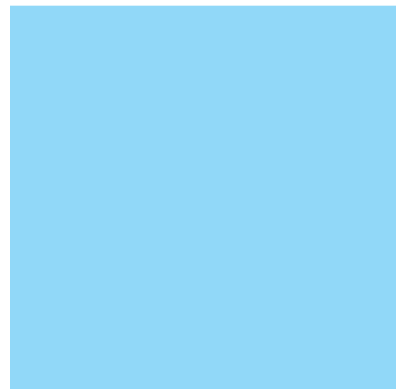


WOMEN

LEADING GOVERNMENT



**WHY SO
LITTLE
PROGRESS
IN
30 YEARS?**



Linda interviewed for a city administrator position with the mayor of the community. Following the interview, the mayor turned to the recruiter and said, “She is an excellent candidate, but I am just not comfortable with her. I need someone I can joke around with, and I would be afraid I would say the wrong thing.”

A new city manager moved from out of state into a position in a metropolitan area. A welcoming event was organized by two area city managers. All but two managers from all of the communities in the region were invited to the luncheon. Both of the uninvited managers were women, and one woman’s community shared a border with the new manager’s community.

Kathleen interviewed for a city manager position. When asked about her weakest area, she responded “budgeting,” which surprised the recruiter. Kathleen had personally developed a \$100 million capital improvement budget for one of the largest cities in the country. When the recruiter later asked why she said that, Kathleen answered that she was not really weak in budgeting but it was not as strong as her planning and management skills.

Names have been changed to protect the identity of the professionals in the examples above but each of these anecdotes occurred within the past two years, and each represents a piece of the puzzle that baffles women in local government across the country. Only 13 percent of all chief administrative officer (CAO) positions are filled by women,

the same percentage as in 1981.¹ Why hasn’t the percentage changed in more than 30 years?

The answer is complex, but it does not appear to be related to women’s academic preparation. In 1984, 59 percent of master’s of public administration degrees were earned by men, while 41 percent of MPA degrees were earned by women. By 2006, the balance had shifted, and women earned 59 percent of MPA degrees while the proportion of men had declined to just more than 40 percent.²

Education has traditionally been applauded as a freedom-granting exercise for women around the world, providing increased opportunities and allowing women to make indisputable gains in the workforce. And yet, the statistics indicate that women remain near the bottom of organizational hierarchies, experiencing

lower earnings, less authority, and fewer advancement opportunities than their male counterparts.³

So what does account for the imbalance? More importantly, what responsibilities do women have for their own success? And what can managers do to improve women’s chances for achieving the top job?

Challenges to Career Advancement

Currently, 34 percent of all assistant positions, 30 percent of department head positions, and 53 percent of all assistant-to-the-CAO positions are held by women.⁴ Women are clearly preparing for the CAO position. So why aren’t they getting the job? Here are four reasons.

1. Women believe they have to have all of the necessary experience before they apply for the next position.

According to a recent study, men show a greater acceptance for risk from their mid-adolescence to their mid-40s, while women tend to be more risk averse during their child-bearing years—a tendency that peaks around age 30.⁵

Sheryl Sandberg discusses this issue at great length in her book *Lean In: Women, Work, and the Will to Lead*: “Career progression often depends upon taking risks and advocating for oneself—traits that girls are discouraged from exhibiting.” Furthermore, she writes that, “The pipeline that supplies the educated workforce is chock full of women at the entry level, but by the time that same pipeline is filling leadership positions, it is overwhelmingly stocked with men.”⁶

Women in local government management often relate stories about their initial reluctance to apply for the top job. DeKalb, Illinois, City Manager Anne Marie

Gaura (2010 population 44,030) was appointed to her first CAO position in 2000 in Montgomery, Illinois (2010 population 18,438), a rapidly growing community in the Chicago metropolitan area.

Prior to that, she had been serving as the assistant village manager in a much larger community in the area. Though the move to Montgomery was a normal career progression, Gaura did not think she was ready for the CAO position until a colleague and an attorney familiar with her skills encouraged her to apply. Appointed Montgomery's first manager,⁷ she guided the community's rapid growth for the next 12 years.

Women tend to work longer to prove themselves before they seek the same opportunities as men. Dierdre Woods, former associate dean and chief information officer for the Wharton School of the University of Pennsylvania, notes that women who are offered promotions "generally feel they need to know 80 percent to 90 percent of their current job before they feel ready to step into a new role."

She added that if a woman is smart and knowledgeable, "probably somewhere closer to 40 percent or 50 percent"

in the process, declaring to the elected officials that they are not interested in the position, perhaps because they do not feel ready for the job.

Then they serve as the acting manager and find that they *can* do the job, they *enjoy* doing the job, and now they *want* the job. Unfortunately, they have taken themselves out of consideration, and it is hard to be placed back in the recruitment process.

2. Women face certain challenges while trying to achieve a work/family harmony. For years, it was a commonly held belief that women could not both raise a family and have a successful career; however, legislation such as the Family Medical Leave Act, the Equal Pay Act of 1963, and Title VIII of the Civil Rights Act in 1964 are all aimed at increasing female participation in the workforce and have helped address some of the barriers for women.

In a *New York Times* article titled "Why Gender Equality Stalled," Stephanie Coontz points out that "as late as 1977, two-thirds of Americans believed that it was much better for everyone involved if the man is the

Research poll in 2010 reports that 72 percent of men and women aged 18–29 believed that the best marriage is one in which both the husband and wife work and take care of the house.¹¹ The data clearly shows attitudes are changing.

Can serving as a CAO be compatible with having a family? Can the sometimes punishing schedule of a CAO be balanced with a private life? In a talk to assistant managers, former Flossmoor, Illinois, Village Manager Peggy Glassford indicated she actually had *more* control over her schedule as a manager than when she was an assistant manager.

This makes sense since the CAO is the head of the organization. Of course, CAOs have to be available to elected officials, residents, and senior staff as well as respond to emergency situations; however, the day-to-day schedule can often be adjusted to accommodate periodic family activities.

One theory regarding the lack of women in the top position is that women take themselves out of the market in order to focus on family and childrearing. A 2012 study of women in the city management profession in Illinois, however, found that a majority of CAOs and assistant CAOs in Illinois have children.

The study revealed that 40 percent ($n = 12$) of respondents (assistants) want to be a CAO and *already have children* while only 16 percent ($n = 6$) of respondents who have children do not want to be a CAO. Also, 16 percent ($n = 6$) of those who do not know if they want to be a CAO do not have children.¹² These individuals may be unsure about becoming a CAO because of the potential challenges of a work-life balance since they do not currently have children.

Most of the respondents who report a career goal of reaching the CAO position have children. This indicates that having children or having a family does not directly influence their career goal. While children may not deter a woman from having an ambitious career goal, there is no question that balancing career and family is a hot topic among women and men in all professional sectors.

ONLY 13 PERCENT OF ALL CHIEF ADMINISTRATIVE OFFICER POSITIONS ARE FILLED BY WOMEN, THE SAME PERCENTAGE AS IN 1981. WHY HASN'T THE PERCENTAGE CHANGED IN MORE THAN 30 YEARS?

is what she needs. Men, however, feel no such restraints. They will start thinking about their next promotion right after they start their new promotion."⁸

Because women are more commonly found in the assistant CAO role, they are often asked to serve as the acting manager when a vacancy in the top job occurs. Women tend to take themselves out of the running for the top job early

achiever outside the home and the woman takes care of the home and family. By 1994, two-thirds of Americans rejected this notion."⁹

Furthermore, Coontz cites a 2011 study by the Center for Work and Family at Boston College that found that 65 percent of the fathers interviewed felt there should be equality in caregiving for their children.¹⁰ In addition, a PEW

This article's author Rachel Lange along with Dr. Kimberly Nelson further researched this topic and found that 42 percent of women achieve the CAO position when their children are 10 or older; however, 43 percent have children under age 8 when they start the top job. Thus, in Illinois the research revealed that having a family is not the only factor deterring women from the top job.

While demanding, a career as a local government CAO has some advantages when compared to some private sector executive positions. These advantages include little to no travel; often living in or near the community being served, thereby reducing commuting time and improving opportunities to attend school events, to go home for dinner before night meetings, and so forth; and the opportunity to bring children to community festivals and events that must be attended anyway.

3. Women who are assertive can be perceived differently than men who are assertive (i.e., the assertiveness dilemma). Women must straddle a difficult line with respect to assertiveness. If they are considered to be overly aggressive, they will not be well received by their supervisors and/or subordinates.

Alternatively, if they are thought to be "too collaborative," they could be perceived as not having the skills to lead—such as not being tough enough. As Sandberg notes in *Lean In*, "success and likability are positively correlated for men and negatively correlated for women."¹³ Never has this dilemma been more apparent than in the following study:

In a 2003 experiment involving MBA students, Columbia Business School Professor Frank Flynn and New York University Professor Cameron Anderson distributed a Harvard Business School study about a real-life successful entrepreneur named Heidi Roizen. Half of the students were given the case study with Heidi's real name, and the other half were given the study with Heidi's name changed to Howard.

WHILE IT IS IMPORTANT FOR WOMEN TO BE AWARE OF HOW THEY MAY BE PERCEIVED, THEY SHOULD NOT OVERTHINK THIS. APPROACHING LEADERSHIP AND MANAGEMENT WITH A CONFIDENT AND PROFESSIONAL DEMEANOR BACKED UP WITH HARD WORK AND ETHICAL CONDUCT HAS SERVED WOMEN LEADERS WELL.

The students were then surveyed on their attitudes toward Heidi/Howard. They rated Heidi and Howard equally competent but considered Howard to be a more appealing colleague. Heidi was seen as selfish and not "the type of person you would want to hire or work for."¹⁴ The good news is that Professor Flynn conducted another study, and when students personally knew the leaders they were rating, the gender discrepancy nearly disappeared.

The fact that women are not better represented in the upper ranks of local government management is concerning, particularly when looking at the study by Robert Schuhmann and Richard Fox that indicates how female city managers bring to the table different priorities, voice different policy preferences, and are perceived to be more responsive to their constituents than are male city managers.¹⁵

Good leadership in local government is dependent on an individual's commitment and desire to serve the community. "A Study in Leadership: Women Do It Better Than Men," by Zenger Folkman in 2012, found that on 12 of 16 competencies, women were rated more positively by total respondents—managers, peers, directs reports, and others.

A preconception often held is that women are better at nurturing competencies, such as *developing others* and *building relationships*. Interestingly, the competencies that scored the largest differences between men and women were *taking initiative*, *practicing self-develop-*

ment, and *exhibiting integrity/honesty*.¹⁶ Women consistently scored higher than men in these competencies.

While it is important for women to be aware of how they may be perceived, they should not overthink this. Approaching leadership and management with a confident and professional demeanor backed up with hard work and ethical conduct has served women leaders well.

4. A woman's career progression may be hampered by the attitudes of hiring authorities and supervisors.

Women may be eager to take the top job but those with hiring authority may have misconceptions about women's abilities. In 2013, the ICMA Task Force on Women in the Profession surveyed 4,443 randomly sampled members. The survey had a 26 percent response rate.

Of the women who responded, 53 percent indicated that on more than one occasion they had received treatment or comments from elected officials that were inappropriate or disrespectful, and 35 percent indicated that the same had happened with a supervisor. In that same survey, 28 percent indicated that they were questioned on their ability to balance work and other personal commitments, and 30 percent of respondents saw their gender as a future obstacle to career advancement.

A report published in 2014 from the ICMA Task Force on Woman in the Profession noted that executive recruiters have confirmed that inappropriate

and, in many cases, illegal questions—questions about marital status, sexual orientation, religious affiliation, and children—are at times asked of both male and female candidates. If a male candidate is married and has children, it is viewed as a strength for his candidacy; however, if a female candidate is married and has children, it is often viewed as a liability to her candidacy.

Another troubling statistic from the ICMA survey involved inclusion in formal and informal gatherings of city and county managers. Thirty-one

advance and that they are included in the formal and informal networks in which men are naturally included; and (4) what all of us can do to address the stereotypes we might have regarding women and leadership.

Steps Women Need to Take

Effectively assess your skills. Certain key skills and experiences are needed for success in the CAO position. These areas may vary, but generally they include budgeting/finance, board relations, economic development, and community

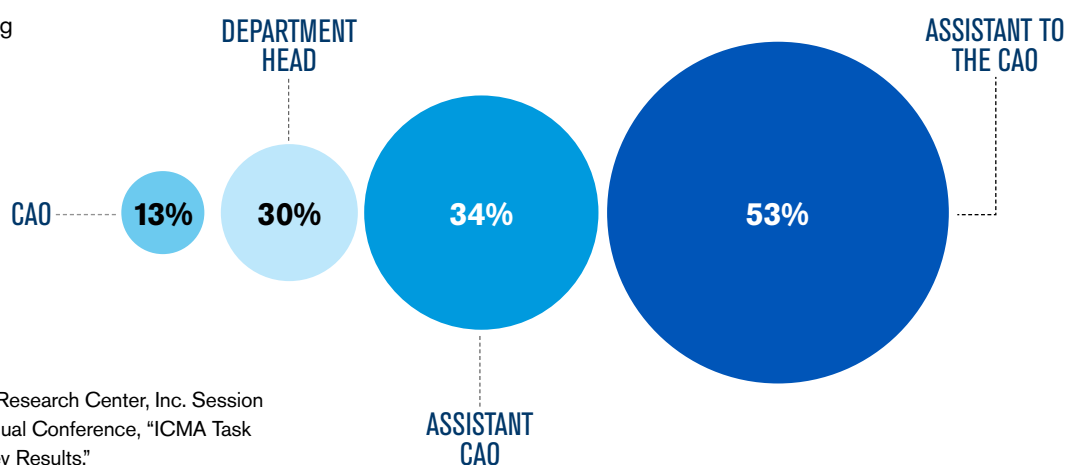
easier to withdraw a short time later than to get back into the process.

Make your intentions known—discreetly. Be sure that recruiters, ICMA Senior Advisors, and, if possible, your supervisors, are aware of your career plans. This does not mean that you are ready to leave or are unhappy with your current position, but it does mean that you have career goals and want to eventually move forward with them.

Interestingly, a 2011 Catalyst study of “high-potential” private sector execu-

Figure 1.

Percent of Woman Working in Local Government.



Source: Tom Miller, National Research Center, Inc. Session presented at 2013 ICMA Annual Conference, “ICMA Task Force on Women 2013 Survey Results.”

percent of respondents indicated they have been excluded from a professional group, outing, or event because of their gender.¹⁷

Readiness Checklist

The four challenges outlined above are factors that contribute to women not reaching the top job. The following section provides a readiness checklist that focuses on (1) what steps women can take to ensure that they are prepared for the next leap in their career and to ensure that they are not holding themselves back; (2) what managers can do to prepare women for that next career move; (3) what ICMA can do to guarantee that women are getting the formal and informal preparation they need to

involvement. Conduct an honest assessment of your skill levels and experience in these areas and then talk with your manager about gaining experience in areas where you may be lacking.

Because women tend to over prepare, discuss your readiness with trusted colleagues, recruiters, ICMA Senior Advisers (formerly Range Riders), or other local government professionals to be sure that you are not falling into the trap of believing you need to have every box checked before you can apply for a position.

If your boss unexpectedly retires or resigns, do not immediately take yourself out of the running for the vacated position. In fact, if you must make an immediate decision and are undecided, indicate that you are interested. It is

tives shows that women’s compensation growth is faster when they remain with the same employer where they have proven their performance. Men tend to increase their compensation when they change jobs, with their compensation increasing based on potential.

According to that study, women must adopt different strategies to advance, and these include proactively networking with influential “others” to make their achievements known. In general, it is assumed that men want to advance, whereas women need to make their intentions known.¹⁸

If you do not feel encouraged by your manager, look for opportunities outside your organization to validate your skills. These can include working



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with the chamber of commerce, serving as your community's representative on intergovernmental organizations, and leading internal task forces that provide for interaction with key department heads who can later attest to your skills and abilities, as well as provide you with critical feedback.

Navigate the assertiveness dilemma.

Self-awareness is always an important trait—understanding how others perceive us can be enlightening and a key to career advancement. Honest self-assessment, however, can be challenging.

Ideally, your manager (if you are an assistant) is providing you with important feedback; other options include a trusted mentor who can candidly advise you, or a network of colleagues and friends with whom you can discuss situations that have not gone well and what you might have done differently.

It is important to recognize negative patterns—if certain approaches are consistently yielding negative results, you must question yourself. Remember that it cannot always be the fault of the other person. It is also important to pay attention to your presentation skills.

According to Peggy Klaus in a 2011 *New York Times* article, women who are concerned with appearing too assertive may at times have an “upward vocal inflection,” which minimizes a declarative statement and “convey[s] weakness, uncertainty, and request for approval.”¹⁹

Leaders who are calm with well-developed listening skills are very effective, and this is a quality that employees and elected officials typically value in their CAO. Employees are more likely to bring bad news to the leader who does not “kill the messenger.”

Many organizations' crises could have been avoided if employees believed they could approach the leader and speak honestly about what was happening. Furthermore, elected officials express frustration with the CAO who is “defensive” when asked questions or who becomes “agitated” when criticized.

There has been clear evidence that women have a difficult line to walk with respect to assertiveness and leadership; however, a consistently professional and approachable demeanor from a leader is welcome regardless of gender. When you are faced with an all-male audience, relying on this consistently professional and confident demeanor and effectively ignoring your gender (and theirs) will serve you well.

Partner with your partner. Whom you marry or choose as a significant other does have an impact on your career.

Sheryl Sandberg said in a 2011 speech at Barnard College's commencement, “the most important career decision you're going to make is whether or not you have a life partner and who that partner is. If you pick someone who's willing to share the burdens and joys of your personal life, you're going to go further.”²²

Develop informal networking groups and join professional organizations.

Sharing strategies and stories about achieving work-family harmony, moving up the career ladder, and meeting the daily demands of a career in local

CURRENTLY, 34 PERCENT OF ALL ASSISTANT POSITIONS, 30 PERCENT OF DEPARTMENT HEAD POSITIONS, AND 53 PERCENT OF ALL ASSISTANT-TO-THE-CAO POSITIONS ARE HELD BY WOMEN. WOMEN ARE CLEARLY PREPARING FOR THE CAO POSITION. SO WHY AREN'T THEY GETTING THE JOB?

The unique role as child bearers creates workplace complications for women that men do not face. Once the maternity leave issue is resolved, however, the differences should fade—provided women have support on the home front.

A 2009 survey by Scott Hall and Shelley MacDermid found that only 9 percent of people in dual-earner marriages said that they shared housework, child care, and breadwinning evenly.²⁰

Furthermore, while the amount of time married fathers spend on housework has increased from 4.5 hours per week in 1965 to 10 hours in 2000, the largest increase in time occurred between 1965 and 1985; since 1985 the increase has not been significant.²¹

Women need to have honest conversations with their partners or prospective partners about child care and household responsibilities—issues that will have an impact on the careers of both. As

government makes an excellent foundation for an informal group get-together. Consider reaching out to colleagues to start the conversation.

Casual luncheon conversations can provide you with new knowledge to resolve a problem you are experiencing. You will gain additional insights, pick up some coping strategies, and most likely develop friendships that will last a lifetime.

It is also important to join and be active in professional associations, which provide further opportunities for leadership as well as for networking with colleagues and future employers. Such participation gives you access to industry experts such as recruiters, attorneys, and other consultants who can become part of your network and provide you with valuable advice.

Involvement in professional organizations is also good for your community and your organization as you

will invariably learn new trends in the wide variety of disciplines represented in local government. Casual luncheon conversations can provide you with new knowledge for a problem you are facing.

Finally, working with elected officials on intergovernmental organizations can raise your profile in your region and put you on their radar if they are looking for their next CAO.

Necessary Steps for Managers, ICMA, and All Professionals

Mentor consistently. Managers need to ensure that they are preparing female assistants in the same way that they are preparing male assistants. Are the female assistants coordinating the budget process? Are they included in collective bargaining strategy sessions and key economic development meetings? Are they included in discussions about board relations issues?

In a study of women in local government in Illinois, more than 80 percent stated that having a mentor was helpful or very helpful in overcoming obstacles to the top job.²³ Only 21 percent of the mentors were female, indicating that male mentors have been very helpful to women in the profession.

Question personal reactions. If a manager perceives a female assistant as being aggressive, he or she should ask, “If a man said or did the same thing, would I have the same reaction?” Be aware of your actions when chairing a meeting.

Women often comment that their ideas or suggestions are not heard until a man makes a similar contribution to the discussion. We all bring biases to the workplace, and it is important to examine them.

Practice inclusion. Ensure that female colleagues are not being excluded from formal and/or informal professional gatherings.

Showcase women managers. ICMA and others involved in planning professional events—panelists, speakers, and

moderators—can work to ensure that women are approached to participate.

Continue the conversation. The percentage of women in local government at the CAO level has not changed in 30 years. The needle has been stuck at 13 percent. This is a complex issue rooted in societal and cultural norms and expectations that are slow to change.

But by any standard, the low percentage of women in the top job is unquestionably depriving our communities and organizations of talented leaders. We need to continue the conversation, recognizing the role that women and men play in advancing women in local government. **RM**

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Managing Medical Marijuana

Is your local government's drug policy up-to-date?

By William Kirchhoff

TAKEAWAYS

This article intends to help readers:

- › Identify the employee groups in the workplace that will be affected by medical marijuana—the legitimate users, abusers, and innocents.
- › Identify problem areas in a typical local government's drug and alcohol policy.
- › Identify red flags that can be used as a screening tool by a local government to decide if existing policies need to be revised.

Marijuana has been glorified, vilified, and medicalized. With 23-plus states and the District of Columbia having legalized medical marijuana, it is now a cascading event that is becoming a new social norm. In 2014, the House of Representatives passed a bill that if approved by the Senate, would remove marijuana from the federal government's Controlled Substance Act Schedule I.

Thus far, most of the efforts by local government officials in states that have legalized medical marijuana have focused on enforcement, zoning, licensing, sales monitoring, distribution control, and revenue collection. But when there are no longer legal restraints against its use, it could emerge as a unique workplace problem for local government management to cope with, including legal, ethical, operational, and organizational culture issues.

Local governments in those states that have legalized medical marijuana will be pressed by employees to treat the use of medical marijuana no differently than other legally prescribed medicines like Vicodin or Percocet, which can impair judgment. This could bring about a variety of challenges, with some having costly unintended consequences that managers will have to adjust to.

Protecting City Hall's Interests

The protection of local government employees is the intent of this article, which is a follow-up to one I coauthored on medical marijuana in the December 2013 issue of *PM*. This article addresses some of the issues that managers might have to deal with because of the ease with which marijuana can be obtained and the growing acceptance of its use—both medically and recreationally.

Cities in Colorado, Washington, and other states where medical marijuana has been legalized have been dealing effectively with such external challenges as dispensary location, taxing mechanisms, and permit requirements. Communities that I am familiar with, however, don't seem to be thinking through the workplace implications that will arise if

marijuana is removed from Schedule 1 and the consequences of it emerging as a unique public workplace problem.

Legitimate Challenges

The challenge now is whether sensible and systematic policy changes will be implemented, or will inaction leave employees unclear of their rights and status? Most current local government drug and alcohol policies I have studied are not sufficiently comprehensive to effectively control the use of medical marijuana.

In fact, most of the policies leave an organization with considerable exposure to the threat of employment law litigation, workplace confusion, unnecessary labor strife, and loss of community confidence.

Current policies, for example, use such drug policy terms as testing site, testing facility, and drug test without the specificity needed to assure the accuracy and reliability of the techniques, equipment, and laboratory facilities used in the testing. Another example is the term safety-sensitive, which is used to establish which employees are subject to drug testing.

Often this general term is not specific in a job description or designation. To most people, emergency responders, truck drivers, and equipment operators are understandably safety-sensitive positions. But what about water plant operators, recreational leaders, mechanics, and code enforcement personnel for whom the safety of others is their responsibility?

A tough-to-deal-with furball of legal, operational, and labor-related challenges is possible if a local government's written drug policy is ambivalent and lacking in specifics.

Up to now, management has focused almost exclusively on the minority group of employees who are illegally using marijuana while at work—the abusers. The legal right to use medical marijuana, however, will affect two other employee groups—the legitimate users and the innocents. Legitimate users will medicate in accordance with the law and their physician's advice, and they will adhere to workplace policies.

Managers will also have to deal with the innocents—those employees who have not used any marijuana but are affected by simply being in the workplace and might test out false-positive in a random drug test. Such edibles as poppy seeds can cause a false-positive test outcome. Prescription drugs like Marinol that are used for anorexia, HIV, and cancer patients can test false-positive for marijuana.

I believe it's the responsibility of the employer to protect these workers from the embarrassment, stigma, and possible discipline attached to testing positive for marijuana as a result of using other medications or eating a common food.

Modernizing Drug Policies

My research indicates that local government policies pertaining to drug use might need to be tightened up with respect to marijuana. Should, for example, a medical marijuana prescription that's written by any physician suffice?

In California, for example, it is remarkably easy to obtain a medical prescription called a recommendation to use medical marijuana. Would it be more responsible to require such prescriptions to be reviewed by the organization's

medical review officer (MRO), usually a contract physician specializing in pharmacology and toxicology?

An already weak drug policy that does not take legalized marijuana into account is detrimental to the organization, which might result in two inevitable outcomes. One is the almost incalculable number of legal, operational, financial, and political consequences that will arise.

The other is that organized labor will seek to protect their memberships regarding testing protocols, second-chance opportunities, confidentiality, random testing procedures, and so forth. The discussions I have had with public sector labor officials make it evident that they are ahead of local government management and are currently developing negotiating strategies to protect the rights of their membership as it pertains to medical marijuana.

Evolving societal and legislative norms, court rulings, and potential legal consequences mandate that whatever changes made to a government organization's drug policies be done with first-rate attention from legal staff, human resources professionals, and operational managers.

Workplace "What ifs"

One purpose of this article is to use the "What If" decision-making model as a mechanism to brainstorm the unintended consequences of medical marijuana. By using this approach, managers, attorneys, human resource specialists, and department directors will be able to anticipate some of the unintended consequences.

Cannabinoids affect sensory, psychomotor, and cognitive function. According to the U.S. Chamber of Commerce, studies reveal that a worker using marijuana is two times more likely to request time off, three times more likely to injure themselves or another employee, and five times more likely to file a worker's compensation claim.

There are two considerations that frame the new marijuana challenge for local government. The first is the necessity of identifying the preferred outcomes of those in charge. The second consideration

should be the seamless and positive acceptance of marijuana as a drug that can be used legitimately by employees once the legal barriers vaporize.

While the list can seem endless, here are some examples of the "What ifs" that public officials will have to contend with.

What if:

1. An employee who has been prescribed topical marijuana for joint pain tests positive without having inhaled or ingested marijuana? Will he or she face disciplinary action?
2. An employee fails to notify his or her supervisor as is required for the use of other judgment-impairing prescriptions? Will the marijuana-using employee be treated the same as employees who have not reported their use of hydrocodone, antidepressants, cold medicines, sleep inhibitors, and the like?
3. An employee is suspected of being in an impaired mental or physical state because of marijuana use? Will the regulatory protocols be identical to other prescribed judgment-impairing

medications commonly used by employees?

4. An employee's legal counsel asks, "How many other employees of record have officially advised their employer that they are using prescription medications that might impair their judgment?" Experience as a former manager warns me that only a few employees will share this information with their employers.
5. A supervisor who has not been adequately trained to observe "marijuana behavior" in the workplace selects an employee who is not under the influence of marijuana or judgment-impairing prescription medication for testing? What are the legal implications and liabilities?
6. An employee's physician certifies that the prescribed amount of marijuana does not impair judgment? Is she or he required to report the use of medical marijuana?
7. An employee uses medical marijuana during off-duty hours and tests positive to random testing but exhibits no judgment impairment?

DRUG AND ALCOHOL POLICY RED FLAGS

The evolution of marijuana as a legitimate medicine requires careful review of public sector drug and alcohol policies. The good news is that the policy modifications necessary to deal with the changing laws associated with medical marijuana are relatively simple.

The bad news is that many of the policies used by local government organizations require extensive recalibration to reduce the threats of adverse litigation, organizational confusion, administrative embarrassment, unfavorable publicity, unnecessary labor-management conflict, and a loss of community confidence.

One way to quickly determine if your organization's existing drug and alcohol policy may need modification is if the answers to any of these questions is "no."

- Is the policy in compliance with USDOT regulations? USDOT is the gold standard for testing thresholds and processes. Information regarding USDOT regulations can be found at www.dot.gov/dapc.
- Are the drug-testing procedures clearly defined? Such commonly used policy terms as testing site, testing facility, and drug test lack

8. The union demands that the testing process, frequency of testing, or review process that is used for medical marijuana must be identical to the standards applied to other prescription medications that may impair judgment?
 9. Labor initiates contract negotiations to protect its employees' rights regarding the use of medical marijuana? Will the government's negotiators have the adequate expertise to protect its interests and the civil rights of its workforce?
 10. A supervisor discriminates because she or he can't get past the stigma associated with marijuana?
 11. Unionized employees demand that the use of medical marijuana by employees be prohibited?
 12. An employee using medical marijuana is injured on the job because of impaired judgment?
- How does the employer protect the professional reputation of employees who choose to use medical marijuana legitimately?
 - How does the employer establish testing thresholds that will meet reasonable legal standards?
 - What process will the employer use for a third-party medical review of marijuana prescriptions issued to employees?
 - What methods will be used to determine the acceptable length of time medical marijuana can be in an employee's system before it is not considered judgment impairing?
 - What are the employer/employee options if an employee is prescribed medical marijuana for a chronic problem—light duty, medical leave, disability retirement, and so forth?
 - What are the testing levels that qualify an employee as being judgment impaired if he or she is using prescription marijuana?
 - What if the union demands that whatever testing process, frequency of testing, or review process that is used

for medical marijuana be identical to the existing standards applied to other prescription medications that might impair judgment?

Checklist for Drug Policy Revision

The fundamental rule here is that the drug policies developed by local governments should be specific, comprehensive, and understandable. General suggestions regarding "tighter" drug policy revisions are found in the checklist outlined below. A more comprehensive checklist can be obtained at kirchhoffassociates.com.

The checklist is organized into three categories. Category 1 pertains to policy and legal nuisances. Category 2 relates to testing procedures and protocols. Category 3 addresses the likely management challenges local governments will face.

Category 1: Policies and Procedures

- **Review the current policies pertaining to controlled substances—such drugs as hydrocodone, antidepressants, cold medicines, and sleep inhibitors.** Failing to differentiate the use of medical

Emerging Questions

The "What Ifs" lead to these questions, among others, that must be addressed:

- the specificity needed to assure the accuracy and reliability of the techniques, equipment, and laboratory facilities used in the testing.
- Does the existing policy specifically identify the types of drugs to be tested? Policies use such ambiguous references as illegal drugs, non-prescribed controlled substances, and mind-altering substances rather than specific identification, including marijuana, cocaine, opiates, and propoxyphene.
- Does the policy specifically define what the unacceptable test thresholds are? Such terms as testing positive and positive laboratory results may leave the decision of what is acceptable or unacceptable outside the organization's control.
- Does the policy identify what positions are safety sensitive? A core

- requirement of any drug and alcohol program is the identification of those positions the organization identifies as safety sensitive.
- Is the definition of reasonable suspicion consistent with applicable law? Reasonable suspicion is when a trained supervisor has a distinct belief based on specific, contemporaneous, and articulable observations of an employee, that he or she poses a threat to themselves or safety of other because of drugs. The definition of reasonable suspicion must support the legal requirements for further investigation on some factual foundation.
- Are random testing guidelines clear and specific enough to stand legal challenge? Pool size for random testing, what positions are in the pool, frequency of testing, and the random selection process necessary for total

objectivity are some of the elements of policy inclusion.

If the answer to these red flag questions is "no," then the drug and alcohol policy needs to be tightened up. My reading of more than 100 current municipal drug policies leads me to conclude that if the above issues aren't sufficiently specific and comprehensive, then there are most likely additional deficiencies of import that are problematic and risk inducing.

Is there, for example, a clear definition of what constitutes a failure to submit to a mandated drug test, and what official is responsible for recordkeeping confidentiality and the chain of evidence? What about off-duty use? What are the return-to-work options and requirements and fitness-for-duty testing? How often and when can follow-up testing occur?

marijuana from other prescription drugs that are commonly used without oversight will invite labor challenges and litigation.

- **Require medical marijuana prescription holders to be examined by the employer's contract medical review officer (MRO).** The duties and responsibilities of this position should be specifically defined by the employer. Without this policy requirement that even a small city can contract for, any licensed physician can prescribe marijuana in those states that have approved medical marijuana.
- **Make sure the policies are not in conflict with state antidiscrimination statutes.** While federal courts have held that the Americans with Disabilities Act (ADA) does not require employers to permit marijuana use to accommodate a disability, state law may do so.
- **Clarify whether or not physician-prescribed topical applicants, capsules, suppositories, food, and beverages containing cannabis can be used in the workplace.** Can smokeless electronic devices or inhalers be used? Should there be a designated area for such use?
- **Require employees to notify human resources in writing that they have been prescribed medical marijuana and how they intend to use it.** Human resources (HR) should review usage policies with the applicant, refer the applicant to the organization's MRO, and notify the chain-of-command with complete confidentiality. The employee's use of medical marijuana and workplace behavior should be monitored and reviewed formally on a clearly established schedule.
- **Establish the protocols for random testing, the type(s) of test to be used, and facilities for the testing event.** Employee confidentiality and privacy during testing are important elements of the policy and process. Define the testing levels that qualify an

employee as being judgment impaired and the review process for appeal.

- **List the positions considered safety-sensitive by your organization and specify the employee pools for random testing.** The random process needs to be unequivocally fair and absent of any bias. The U.S. Department of Transportation (USDOT) is the best source of information regarding the subject of random testing safety sensitive positions (www.dot.gov/dapc).
- **Impose specific disciplinary and second-chance rules that can be applied to the workforce.** Unduly strict policies can result in the termination of a solid employee who casually smoked or ingested marijuana off duty days before a random test.
- **Consider policies to prevent the increased recreational use of recreational marijuana.** The ease with which recreational users can use these products (e.g., smokeless inhalers, edibles, topicals, and beverages) undetected in the workplace has increased significantly. This group of employees, the abusers, will use medical marijuana to game the system.

Category 2: Mandate Specific Testing Guidelines

Developing a legally defensible testing protocol is critical. Detection time differs with the type of testing. Hair follicle testing, for example, can trace marijuana usage as far back as 90 days, with urine testing for a single-use event testing positive for 48 to 72 hours. Currently, there is no way a test can determine when marijuana was used.

USDOT testing thresholds are the best general reference for testing guidelines. Another reference can be found at www.aboutdrugtesting.org.

Category 3: Management Challenges

- **Train supervisors to detect the use of unauthorized marijuana.** Without an acceptable training curriculum, supervisors will not be able to identify drug use behavior, nor will they be

able to withstand challenges from the opposing employment law counsel.

- **Require management protocol training for all supervisors.** Such sensitive employee information as drug-test results and requests for special needs to accommodate the use of prescribed marijuana, need to be treated confidentially.
- **Address how off-duty recreational use of marijuana is treated if its use is permitted by law.** Organizations can prohibit the use of alcohol four hours before reporting for duty. What prohibitions are legal and sensible for the use of recreational marijuana off-duty, which can test positive for up to 90 days after its use?
- **Recognize organized labor's interest.** It is important to recognize that labor could resist additional oversight policies that will be necessary to manage the employee's use of medical marijuana. A first-to-the-table strategy by management is a recommended approach for labor negotiations.
- **The scope of HR's oversight involvement will need expansion.** Confidential recordkeeping, chain-of-evidence management, management of testing protocols, and disciplinary actions and appeals are but a few of the challenges most HR departments will face, particularly those of smaller jurisdictions.

Managing marijuana in the local government workplace will certainly become more complicated when the federal government drops it from the Controlled Substance Acts Schedule 1 and as states continue to approve the use of medical and recreational marijuana. The core challenge will be getting ahead of the curve by drafting comprehensive drug policies so that the worker and the workplace are protected. **PM**



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BY MATT KRIDLER

PAYING IT FORWARD

Giving back makes for a rich life

There are extremely few professions that provide the opportunity to serve and work in a way that has a daily impact on people's lives and a long-lasting effect upon a community. Local government management is one of those professions.

It is a privilege and an honor to be a manager. Sure, it can be difficult and stressful at times, but there are few professions that can bring so much satisfaction and so much change for the good.

It often takes time for us to realize what the management profession is or has been all about. In my opinion, it's about serving people, making things better, and leading communities to a brighter future. There are no other professions that come even close to it.

What we, myself included, often forget is that much of our professional success is due to those who supported us. We owe so much to these communities, supporters, and others who helped us serve so well.

As we become experienced in this profession, it becomes time to pay back or "pay it forward" as popularized by a movie that highlighted this concept. It's doing something good for someone in response to a good deed done for you.

If done right, it's a selfless act. As Winston Churchill put it, "We make a living by what we get, we make a life by what we give."

Getting Involved

When I was serving as a full-time city manager, I thought that I was already serving the community enough and did not have the time or the need to become more involved. That was not true.

Even as a full-time manager, you can serve the entire community by giving your effort and time to getting involved with the entities that make the community special. You, like me, probably

already know managers and other staff members who seem to have the time to become more involved.

Often, it's a meeting at breakfast, lunch, or several hours after work; maybe a weekend from time to time. It could be a food bank, a church, or a high school—whatever a person is interested in will be helpful and truly appreciated.

As an example, one of these full-time, professional managers also volunteers in the community where he resides. He sets up community affairs like festivals, often runs them, and spends hours on a few such ventures several times each year. He enjoys himself and is really appreciated for his work.

Another top staffer in the city I once worked for gave many hours serving these special groups. He is currently chairman of the community food bank. He developed many of his leadership skills in the management profession.

Retirement Opens Up More Opportunities

Within a year or so after I retired as a manager, I was appointed by the mayor

of the city where I live to serve on a new board known as the Convention Facilities Authority. CFA was formed to provide funding assistance for existing venues, new construction, and expansion of facilities that directly target tourism and preserve historical artifacts in our region.

It has true stand-alone authority, with the power to levy taxes (excise tax) and to borrow money, and it operates independently of the chamber of commerce, city, and other governmental entities. Eleven members are appointed to this authority; some from the city, county, chamber, businesses, and small townships throughout the county. I was elected its first chairperson and remain in this post to this day.

Even after serving as city manager of Springfield, Ohio, for some 20 years, I never fully realized the many fabulous facilities that serve the community, including an art museum, a Frank Lloyd Wright structure, and even a first-class equine center, which is one of the few in the state.

It was astounding to me that the community had so many treasures and facilities for a region of its size. Yes, I knew these facilities existed, but rarely their honorable missions or the details of their venues and operations.

What a privilege it is to serve on such a board now. It's an opportunity

VOLUNTEERING TAKES LESS TIME THAN YOU MAY THINK. I STILL HAVE PLENTY OF TIME TO ENJOY RETIREMENT ACTIVITIES. I STRONGLY BELIEVE IN THE LOCAL GOVERNMENT MANAGEMENT SYSTEM AND ENJOY PAYING BACK TO THE COMMUNITY.

to preserve the community's heritage, open new venues, and assist struggling businesses.

Now I will be able to pay back the community that truly supported me and my family as its manager. It is an unmatched opportunity and one that I find satisfying because it will have a positive, long-time effect on this community. It set me off into the pay-it-forward mode.

Ensuring the Profession's Future

I taught for years at a local university that has become known for its leadership and training of future local government managers and administrators. I know many of the former students who have since entered the management profession and are doing well in their careers. I was privileged to be a part of that.

As I move on in retirement, I continue to work with the public administration faculty; not as an adjunct professor, but as an adviser on a volunteer basis. When requested, I assist with locating and training future adjunct instructors, review curriculum changes and courses, and am presently working on an MPA program-alternative that will dig deeper into a local organization to train department heads and other leadership positions.

I owe this university that trained me how to teach and gave me the opportunity to reach out to our future leaders and managers. Now I find myself making an institutional, long-lasting change in training these professionals and organizations.

Shortly after retiring, I was also appointed a senior adviser by ICMA and the Ohio City/County Management Association (OCMA). In this post, I welcome those who are newly appointed to management positions and introduce them to our state association and to ICMA. I attend as many ICMA and OCMA meetings/conferences that I can so I stay in touch with the profession and know the new manag-

ers' needs. Things change and I've got to keep abreast of that.

I also focus on managers who have been recently terminated. It's a traumatic time for many who have experienced this unfortunate occurrence. First, I let them vent their frustrations and feelings, then we move on to revising resumes, searching job opportunities, and the like.

I stay in touch with all these contacts. It is paying back to the management profession and those who run our communities today.

The Reward Is Yours

Paying it forward by volunteering in retirement is not suitable or satisfying for everyone. Whether it is traveling, exercising, or participating in a sport like golf, it's finally your time to fully enjoy life.

But volunteering takes less time than you may think. I still have plenty of time to enjoy retirement activities. I strongly believe in the local government management system and enjoy paying back to the community. It took me years to realize this after doing only retirement-related activities. Full retirement without staying involved was not satisfying for me.

Serving these causes is rewarding, and you will have made a difference and be appreciated by the community. As Calvin Coolidge once stated, "No person was ever honored for what he received. Honor has been the reward for what he gave."

Honor is rarely taken away and is something for which we strive. It can be the hallmark and lasting pride of our career—it would be folly to pass it up. **PM**



MATT KRIDLER spent 33 years in the city management profession, 20 of them as city manager, Springfield, Ohio, where he currently resides (mkridler@woh.rr.com). He is a senior adviser for ICMA and the Ohio City/County Management Association.

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ICMA

BY JEFF DAVIDSON, CMC

A NEW YEAR: ARE YOUR GOALS CHALLENGING ENOUGH?

Clues that suggest it's time to up the ante

Abraham Lincoln did all he could to win a seat in Congress. He lost far more elections than he ever won. In fact, in 1858, two years before he won the presidency of the United States, he lost a senatorial bid in his own state. Obviously, he felt he was up for the challenge of running for an even higher office than the one he had just lost. History proved him to be correct.

Richard Nixon, who probably could have won the 1960 presidential election but might have lost it because of alleged ballot box stuffing on the part of Mayor Richard Daily of Chicago, then went on to lose the 1962 gubernatorial election in California. He was, however, triumphant in 1968, and again in 1972, in his bid for president of the United States. Despite his downfall via Watergate, Nixon won some big elections.

So when should you decide to make your goals more challenging? The answer isn't the same for everyone, but here are some common indicators:

When you reach your present goals at warp speed. If you did your gut-level best to set challenging but reachable goals that were quantifiable and within specific time frames, and you ended up reaching them in a fraction of the time you originally allocated, that's definitely a clue. It can and does happen.

When Magic Johnson entered the NBA in the 1979–1980 season, along with other rookie superstars, he probably had a dream of making the NBA finals and winning a championship or two. Although he was the starting point guard for the team, during the championship series when Kareem Abdul-Jabbar had to miss the sixth game in Philadelphia due to injury, Johnson filled in at center, scored 42 points, and became the series MVP.



Thus, when Johnson's Laker team won the NBA championship in his rookie season, one championship wasn't going to be enough.

As your power and influence begin to soar. Ralph Nader took on the entire automobile industry in the early 1960s through the courts and with his best-selling book, *Unsafe At Any Speed*, which documented identifiable and known risks in popular selling automobiles. Nader was rapidly hailed as a consumer advocate.

Early on, Nader learned that one well-developed case intelligently presented in the judicial system is more effective than 10,000 protesters clanging on the fences outside of General Motors. He did not rest on his laurels, however, initiating Public Interest Resource Groups in every state (PIRGs), a national magazine titled *Common Cause* (in juxtaposition to special interests), and much more.

To this day, he's been a tireless advocate of environmental protection. In many respects, Nader's entire career has been one of upping the ante to further the progress of causes that he sees a need to support.

When every fiber in your being says "move on." Whether you reach chosen

goals quickly or experience expanding power and influence, you still might choose to up the ante if a little voice inside you says, "I can do more." So, even in the absence of evidence in the pursuit of some long-term goal, sometimes you realize on a profound level that it's time to go back to the drawing board.

There's always the danger of running into the barrier of biting off more than you can chew. If you've already racked up a number of significant achievements, however, having the self-confidence—or having otherwise proven to yourself—that you do indeed intend to finish what you set out to accomplish, I say full speed ahead.

By setting challenging goals and taking risks to achieve them, you will open new doors for yourself, enjoy life more, and accomplish what you had previously thought unreachable. **PM**



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BY NICOLE GREER

CREATING A VIBRANT CULTURE

Employ the vision technique to see what is possible

Today's local government managers are looking for techniques, not theories, to make the significant changes that demand their attention. In my work with three local governments, putting a coaching technique known as visioning in place **creates** the spark that **makes** a real culture shift happen.

What is needed in government is some fresh thinking. Boggled down at times by tradition that leaves employees with outdated mental models, leaders can use visioning to open up new ways of thinking. This coaching technique encompasses a set of strategies that are easily incorporated into a leader's style, which can alleviate what I see as an inordinate amount of time worrying about resources.

Essentially, leaders must focus on four resources: money, time, energy, and human capital. The emphasis on money is incredibly overemphasized. In fact, it puts a stranglehold on the three remaining resources, creating what coaches call a state of being "stuck in place."

When issues come up, the first reaction is to make a statement about budget, cutbacks, and serious need. Leaders find themselves up against an obstacle that holds them hostage to someone else's power.

While I am aware that money matters, I contend that leaders need to shift their thinking into a more balanced state where they stop to think about how time, energy, and human capital can help alleviate money worries.

Vision Work

Leaders must slow down to think about how to envision the future with the resources they possess in order to see what's possible. To create a culture that

is vibrant, one pulsating with energy, excitement, and enthusiasm, a clear vision must be imagined.

Doing this vision work might be a challenge for the head-down, budget-driven manager. It needs the uncommon character trait called willingness. As author Mike Hernacki states in his classic book *The Ultimate Secret to Getting Everything You Want*, "By way of definition, willingness is a frame of mind which is open to every possible demand, without judgment, reservation, or refusal."

In essence, a leader must be able to see the future along with its demands and create a vision with the resources he or she has versus creating a vision with resources he or she doesn't have.

As author Stephen Covey conducted seminars over the past three decades, he would open up a session with the question, "How many of you are being asked to do more with less?" In a frenzied fashion, the audience would shoot their arms into the air to declare, "That's me."

In the next breath, Covey would ask, "How many of you are at your full potential with no more capacity to grow, learn, or contribute your talents?" And a hush would fall over the room. No one dared to declare that they had reached their maximum capacity. *Hello!* They were at a Stephen Covey seminar where you sharpen your saw.

Then, in Covey's trademark style, he calmly requested, "Reconcile that for me." Covey insisted that people look past the constraints of money and focus on how they could personally harness their time, energy, and human resources to make things possible.

If you are not personally tapped of your potential then you cannot be in a state of being asked to do more with less. The request from your stakehold-

ers is do more with the more you have, namely your energy, time, and human resources. The leader must be able to envision how this can be done.

Visioning is the first technique in the coaching toolbox. As author Lucia Capacchione states in her book *Visioning*, "Visioning is applied creativity." Visioning is a design process whereby you move through six creative stages that I've consolidated from Capacchione's work and given my own interpretation for organizational development. Using design principles, the leader is building and creating just like an architect, advertising firm, or an engineer.

The Vision Technique

Stage 1: Understand the need. In this stage, the leader chooses a focus area, issue, opportunity, or challenge to invest resources on. The powerful question to answer is: What do I really want the outcome to be? The answer to this question must be charged with positivity and possibilities. The aim is to look at what could be, should be, and why it's imperative.

At this point probability is not considered. The leader writes down what he or she really wants. This stage cannot be skipped. A written down, articulated, and thoughtful declaration of the need behind the design creates urgency that drives the rest of the process. This is your working vision statement.

Stage 2: Research the need. The goal at hand is to compile a collection of data, pictures, and ideas that support the outcome desired in Stage 1. Be careful. This is not the time to dwell on what is wrong, but instead, to be researching what could be, should be, and why.

This is not the time to chase after more proof that there is a problem. The leader is chasing after proof that there is a solution.

This is the time to look to the corporate world, the arts, and history as well as colleagues for inspiration. Create a vision board. Yes, vision boards are for city and county managers, too!

Every design firm creates mock-ups of their products so they can literally

“see” what the future design is going to look like. Just as an architect creates a rendering for a new structure, leaders need to create a structure in a vision board that informs the imagination of what is to come.

Stage 3: Connect the research to the need. The goal here is to create a connection between the original vision and the research. The leader carefully discerns what is possible and chooses the key systems, strategies, and smarts that now make the vision probable.

Parts of the original vision may morph at this time and research may be set aside as irrelevant or placed in a file for future use. The core ideas, images, and inspiration for the vision are captured.

Stage 4: Create objectives that support the vision. The leader articulates the objectives the team will pursue to reach the vision. Objectives are principled measurements

that support, drive, and create accountability to move toward the vision.

These objectives are to clearly articulate how you will move forward using the four resources: money, time, energy, and human resources. This is done through a strategic planning process. Implementation of the core ideas, images, and inspiration are turned into the actionable, next right steps.

Stage 5: Create stories about the future. Now is the time to step back and look at the vision board, the objectives, and the strategic plan. The leader uses his or her imagination to see what the future is like once this work is complete. In the process, stories are created.

Leaders must answer these questions to create their stories:

- What stakeholders are impacted by this vision?
- What is the reward for the stakeholder if the vision becomes a reality?

- How is the community remarkably different?
- What does the achievement of this vision tell us about the employees of our city or county?
- What does the achievement of this vision tell us about the citizens of our city or county?

With these questions answered, create two imaginary stakeholders: an employee and a resident. Name them and create a story where the employee and the resident experience the vision. Practice sharing your stories of the future.

Stage 6: Move the vision from possibility to probability. The leader now exercises the essence of leadership, what author John Maxwell calls influence. Using change-management strategies, the leader takes the next right steps toward his or her vision by:

- Conducting private interviews with key stakeholders, and sharing the vision board, strategic plan, and stories.
- Announcing the vision at a town hall meeting and sharing the vision board, strategic plan, and stories.
- Walking the talk: One-on-one sessions with employees throughout the organization must be done to share the vision board, strategic plan, and stories.
- Conducting coaching in place for key players.
- Clarifying questions.
- Providing necessary skill building needed to carry out the vision.

The vision technique is an ideal tool for a manager. With the plethora of issues that scream for the leader’s attention, it’s imperative that he or she pull away to a quiet space to gain clarity, to see what is possible. **PM**

LOCAL GOVERNMENT VISIONING

I have had the privilege of working out the vision process with Mooresville, North Carolina, under the leadership of Town Manager Erskine Smith and Human Resource Manager Keli Greer; Centralina Council of Governments, Charlotte, North Carolina, under the leadership of Executive Director Jim Prosser; and Salisbury, North Carolina, under the leadership of Assistant City Manager Zach Kyle, Human Resource Manager Ruth Chaparro, and Human Resource Assistant Manager Michelle Nguyen.

While each of these organizations are undertaking the vision process in their own unique way, at the heart of their process is a vision statement to which both senior leaders and emerging leaders within the organization actively contributed. To further instill and co-create behaviors necessary to live out the values of the vision, these organizations have embraced coaching as the catalyst to create significant movement. This has resulted in the behavior change of their staff associates.

Ultimately, they have created a consistent space in the calendar to create a space for:

- **The Art of Dialogue:** a group-coaching technique that builds a safe environment to voice changes that must be made, enables communication, and builds trust.
- **Feedback:** a constructive tool that corrects course and celebrates the wins along the way.
- **Accountability:** a must-do skill that leaders need to create the energy for the vision to move from possible to probable.

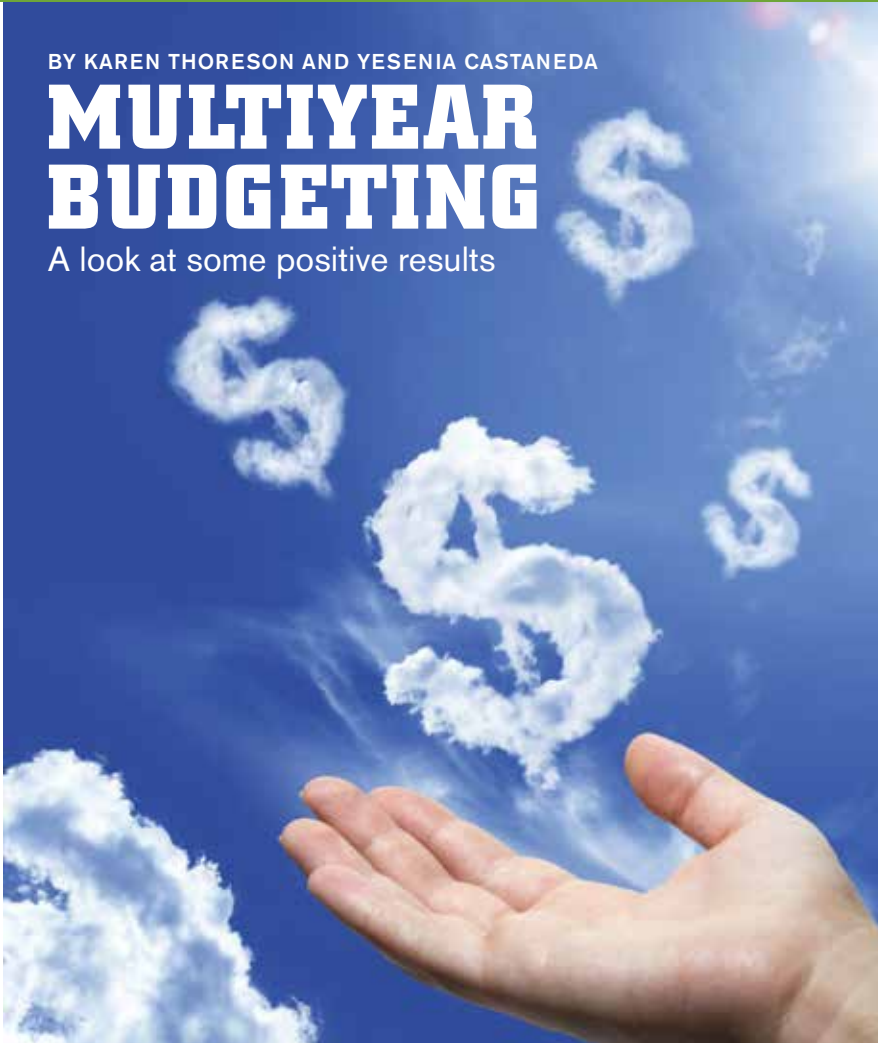


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BY KAREN THORESON AND YESENIA CASTANEDA

MULTIYEAR BUDGETING

A look at some positive results



Budgets. . .every community has one. But if you look a little deeper, there are some nuances in the public government’s budgetary realm that are worth exploring. This article will discuss the practices of cities and towns that adopt multiyear budgets—why they do so and how these budgets work.

Most local governments adopt annual operating budgets and multiyear capital improvement budgets. The logic is pretty simple: State or provincial law requires an annual budget and many major capital projects require multiple years to complete. In essence, an annual budget meets the letter of the law and with capital expenditures, it is necessary to plan ahead in order to secure the funds to pay for large expenditures and complete complex projects.

But some local governments have gone beyond the state annual budget

minimum requirement and opted to develop a longer term operating horizon that helps them plan further out on their day-to-day services and also to provide justification for their revenue and expenditure predications.

Novi, Michigan, develops a single budget that spans three years, even though Michigan state law requires an annual budget. The city lays out all of the relevant budget policies that guide the proposed revenues and expenditures (see [http://www.cityofnovi.org/City-Services/City-Manager/Budget-and-Multi-Year-Financial-Plan-\(Current-and-Budget2014-2015Final.aspx\)](http://www.cityofnovi.org/City-Services/City-Manager/Budget-and-Multi-Year-Financial-Plan-(Current-and-Budget2014-2015Final.aspx))). The financial plan is embedded in the full annual budget document in order to provide context for the upcoming proposed expenditures and revenue policies.

Thus, as the budget is approved each

year, the three-year budget is extended out by one year. Assistant City Manager Victor Cardenas says that “A multiyear approach allows you to see where we are, where we are going, and where we plan to be.”

San Luis Obispo, California, has been doing annual budgets that span two years since 1983. In a white paper authored in 2007, the staff describes how developing a two-year plan helps everyone keep an eye on the future and ensures that activities being undertaken are sustainable and desirable. Says Michelle Bulow, finance administrative assistant, “Our two-year budget reinforces our commitment to long-term fiscal health by looking beyond a one-year time horizon in our ability to fund operating programs and capital improvements.”

Lethbridge, Alberta, Canada, has been using three-year budgets for more than a decade. Staff members say that their 2012–2014 budget, although considerable work to prepare, allows them to plan, evaluate, and improve programs throughout a three-year cycle.

In 2013, council terms changed from three-year to four-year terms. So Lethbridge is now moving to a four-year budget to match those elected officials’ terms. Director of Corporate Services Cory Wright says, “Multiyear budgeting has been fantastic for us. It also prepares the city for any unforeseen circumstances that may require a nimble response in order to avoid serious consequences.”

Calgary, Alberta, Canada, got approval to begin development of three-year budgets in 2004, bringing its first multiyear budget into place for 2006–2008. Today, staff members undertake four-year budgets and recently approved the 2015–2018 operating budget.

They note in the budget document that while the Canadian Municipal Government Act requires balanced operating budgets for each calendar year, there is nothing to prohibit the governing body

from approving more than one budget at the same time.

Sarah Woodgate, manager in the chief financial officer's department, says, "Multiyear budgeting allows approval of longer-term funding, which supports the identification and achievement of our strategic goals."

The Washtenaw, Michigan, County Board of Commissioners approved its first quadrennial budget this year for fiscal years 2014–2017. Where in the past, they had used two-year budgets, the staff

that multiyear budgets promote these positive results:

- Planning long term so that long-term goals can be achieved.
- Providing residents with more certainty about the direction of local government services, finances, and tax levels.
- Making more strategic use of the governing body's time in reviewing budgets and the administration's time in preparing them.
- Focusing on continuous improvement and implementation and not just planning.

- Thoughtfully convert those goals into implementable programs.
- Have the discipline to stay with the plan and not dramatically change course in order to fund a favorite "program of the month."
- Establish reasonable time frames and organizational responsibility for achieving them.
- Allocate sufficient resources for the top priorities and constantly review to discourage "mission creep" or a gradual shift in objectives

"A ROLLING, MULTIYEAR BUDGET REDUCES POLITICAL PROBLEMS. SINCE BUDGET REAFFIRMATION OCCURS ANNUALLY AND THE BOARD HAS TWO-YEAR TERMS, THE BUDGET IS LESS LIKELY TO BE A PART OF THE POLITICAL FRAY."

– **Verna McDaniel**, County Administrator, Washtenaw, Michigan

and elected officials felt the community would be better served through a focus on financial sustainability, stability, and organizational service delivery.

In their case, long-term labor agreements and a culture of reinvention of government service delivery underscored the commitment to long-term planning. Washtenaw has a rolling multiyear budget; one budget is created every four years, but the budget is reaffirmed with minor adjustments annually.

County Administrator Verna McDaniel says, "A rolling, multiyear budget reduces political problems. Since budget reaffirmation occurs annually and the board has two-year terms, the budget is less likely to be a part of the political fray."

Why Go Multiyear?

What are the rewards and risks of completing a multiyear budget? All five of the communities listed above agree

- Retaining the benefits of an annual budget through quarterly reviews and "tweaking."
- Having the ability to incorporate operating costs linked to the capital improvement plan.
- Instilling discipline to control spending plan changes.
- Promoting more orderly spending patterns; in other words, mitigate against the use-it-or-lose-it mentality.
- Allowing elected officials to see how important programs get implemented over time when they are timed to the council/commission election cycle.

Likewise, these communities agreed that some fundamentals have to be in place in order for multiyear budgets to succeed:

- Take seriously the goal-setting process with elected officials and through survey results with residents.

According to a San Luis Obispo, California, white paper prepared on its multiyear budget, an organization should ask several important questions before embarking on a new process like this type of budget:

- Most fundamentally, what do you hope to accomplish if you adopt an approach such as this?
- What is your current organizational culture in terms of departmental versus centralized control of the budget? Is this something you want to change?
- Is integrating strategic planning and the budget process a high priority? Do you have a process for that now, and will a multiyear approach improve it?

The Alliance for Innovation is undertaking its first two-year budget planning for calendar years 2015–2016. Guided by its board-approved strategic plan and member survey results, the Alliance wants to focus its small staff's energies and its organization's resources on accomplishing *goals that matter*.

Moving forward, our organization will focus on what we do, why, and the results our efforts will produce, and not just on "How much does it cost?" **PM**



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BY JERENE WATSON, ICMA-CM

MANAGEMENT TALENT EXCHANGES

Sharing a Useful Message

This past September, I sent the May 2014 *PM* Innovation Edge article, “Networking Leads to Better Results” by Karen Thoreson and Greg Stopka, to the Flagstaff, Arizona, leadership team for first reading. The article explains how management talent exchanges can be beneficial. City Manager Kevin Burke then asked if I would present it to the team for discussion. This article explains our outcome.

Management exchanges have been a concept discussed for internal application within our organization since I arrived in Flagstaff in 2011. Because the budget had improved, we were able to consider some innovative programs in 2014. Having worked in Phoenix, Arizona, some years ago where I observed the rotation among middle and upper management, I was familiar with a talent exchange program.

Manager Burke introduced his idea of “Refresh” on July 1, rotating two department directors for the first time. Community development—which includes engineering, building inspections, planning, and code compliance—swapped with management services, which involves finance/budgeting and procurement.

Several smaller, temporary rotations were started that have evolved into specific areas of the organization. The idea of rotations had not been attempted by Flagstaff staff before in any formalized or ongoing effort. The organization is getting used to the idea now, so we walked slowly at first.

Benefits

In part, our “Refresh” has boosted morale, given a new set of eyes and perhaps approach to traditional functional areas, helped develop organizational talent, and expanded staff capacity, in some instances. In human resources, for example, we needed to cut the second-level personnel in the department during the 2008–2009 recession; however, this left only employees at the next lower level who had the experience doing the line work that was needed.

When I assumed HR responsibilities in July 2014, I prepared my assessment and asked the city manager if we could implement a nine-month rotation with a temporary employee. This person would become the HR manager and assume some of the workload to free up our HR director for other projects while also learning a new field and new skills.

The employee who accepted the offer worked in the recreation division. She began to work closely with the HR director



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and also take on special work projects to help eliminate the department's backlog. When this article was written, we didn't know if the position would become a permanent position for budget approval in 2015.

If nothing else, it gives the staff member real-time experience in human resources, cross-training, and career options, if she chooses them, while also assisting the city's HR director.

What's Next?

The *PM* article gave us a useful jumping-off point for application and discussion internal to our organization here in Flagstaff. We have also begun thinking about how to accomplish some partnership exchanges in the county and with other regional partners. **PM**



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BY IKE HOLLAND

PUTTING A TOWN ON THE MAP

Tranquil valley finally gets a new identity

In 2004, as the city administrator of Orchard City, Colorado (population 3,021), I asked the council: What is the main accomplishment you want me to achieve as the administrator? The reply, “Don’t let anything change.”

This meant no more growth in housing, population, stores, industry, and roads. The councilmembers were serious. They wanted to keep things as they were.

They told me that people had moved to the community for the rural nature of the valley and didn’t want growth. My response was that I didn’t think I could stop time or not allow more people to move into a valley that continues to grow each year, but that I would do my best.

Time Stands Still

Orchard City was established around 1912 by a group of fruit growers, and they needed a water line from the Grand Mesa National Forest. They didn’t need or desire anything else from this community. When I was appointed, apparently the residents—old and new—still only wanted one thing from the town and that is the liquid gold called “Colorado water.”

Time did seem to have stopped in Orchard City in 2004. Upon my arrival, I learned the following facts about this Colorado western slope community: It had no schools, no library, no police, no hospital, no grocery store, no sewer system, no airport, and no signs stating that this was even a town. This was a place with more than 3,000 residents that had more than 20 miles of a state highway running north to south, but for all intents and purposes, the clocks had been stopped.

And there were other unique things about this small community that would

baffle me. It had three post offices with three different zip codes and none of them were assigned to Orchard City. There were three postal districts that had been established over the years, and they had kept their district names of Austin, Cory, and Eckert.

This also meant that no one had an Orchard City address in town, including city hall. This always led to some

interesting telephone calls when I would say I was the administrator of Orchard City, and the city hall address was in Austin, Colorado.

That confusion continued with printed phone books, because residents’ phone numbers were not listed as Orchard City but rather as Austin, Cory, or Eckert. Then, because the phone book and the post offices all stated these addresses, Rand McNally and Google continued the error by posting their maps without including Orchard City.

Signs Signal a New Direction

Try giving someone directions on a map that doesn’t show the town listed, and you are guaranteed some surprised and nervous reactions. I decided to place town limit signs and welcome signs around Orchard City to clarify and reduce confusion. That was my first mistake.

Signs went up on all major streets and the highway into town. I would re-

ceive calls from local outraged residents stating they lived in Austin, Cory, or Eckert, not Orchard City, and ask “What is going on?” I would try to explain my reasoning based upon the confusion. This did not seem to appease them, but rather confuse them even more.

Finally, my response was that if they lived in a town other than Orchard City, maybe they should call the mayor of that town. My Oklahoma wit did not impress them, but rather forced them to inquire to my motivations as the new city administrator of this town they did not live in.

Eventually, the community did accept the signs and allowed them to stay up,

THEY TOLD ME THAT PEOPLE HAD MOVED TO THE COMMUNITY FOR THE RURAL NATURE OF THE VALLEY AND DIDN’T WANT GROWTH.

and residents did admit that sometimes visitors found it hard to locate homes and farms. Even today, residents can still drive their farm tractors to the town hall to pay their water bills.

They can also enjoy a valley that sees little crime, tranquil drives, friendly neighbors, full churches on Sunday, and the best Bing cherries. Plus, Orchard City is now placed on Google maps so you can find it if you want to visit.

I truly enjoyed my four years in this mile-high city and fondly tell stories of duck hunters, wild bears, and fishing. If you do visit Orchard City, don’t tell residents I was the one who gave you the directions. And if you find yourself wanting to live there, no one will be surprised. **PM**



IKE HOLLAND
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March 26–27

MIDWEST

Evanston, IL
Hilton Orrington/Evanston
April 2–3

MOUNTAIN PLAINS

Omaha, NE
Doubletree by Hilton
Omaha Downtown
April 9–10

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