

Resources for the

Interim or Acting Manager



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PREFACE

Perhaps the prior manager's departure was well anticipated, and for various reasons, the selection of a successor will not be completed before the manager leaves. Alternatively, the manager's departure may have surprised people, and there are feelings of shock and concern about its impact on the organization. In either case, or because of many other possible scenarios, you have to decide whether to take on the role of interim manager. This resource guide can help you prepare for and respond to this opportunity, whether your answer is a thoughtful "Not at this time" or "I can do that!" or something in between.

In 2016, ICMA's Executive Board created the Task Force on Updating the Acting Manager's Handbook to update one of ICMA's most popular resources. The task force was asked to review the 2005 handbook's collection of information for a potential interim or acting manager/administrator in local government and advice on how to make the most of a perhaps unexpected opportunity. Consider the following:

- The decision to accept the role of interim manager can be a difficult one, requiring thoughtful consideration of where you are and where you'd like to be in your professional and personal journey. At the same time, your governing body and staff may see it as a no-brainer. Our task force spent considerable time putting together reference points and perspectives that can assist you with this important decision.
- Serving as the acting manager may be the best on-the-job training you'll ever get. Your experience will give you an opportunity to be seen in the manager's role by the elected officials and, if they look favorably on your performance, will help you land the position permanently, whether now or in the future.
- Serving as the acting manager is also challenging. To be most effective, you'll need to redistribute duties by tapping resources throughout and outside the organization. You'll also need to lean heavily on your personal support network, as the top job can be lonely and isolating. You'll need to diligently maintain a personal and professional balance so that you can physically and mentally meet the challenges of this critical assignment and ultimately look back upon this experience as a key step in your professional journey.
- If you're the assistant manager or a department head who may be tapped to serve if your manager leaves, take time now to consult with your manager and discuss ways to gain experience with the elected officials, leadership across departmental lines, and visibility in the community to better prepare for assuming the leadership position.
- If you are an emerging leader seeking to become a manager, use this resource to consider what skills you need to develop and how you can gain the experience you will need to serve. Many of the dynamics described here also apply to other interim positions you may be asked to assume.
- If you have already been named acting manager, congratulations! You are in for a difficult yet exhilarating and extremely fulfilling ride. This resource will help you along that journey.

The task force worked hard to compile this collection of advice, lessons learned, and other resources to assist acting managers. Building on the excellent work of the 2004–2005 task force, we drew on personal experiences, reached out to colleagues, and conducted a survey of other managers who have served in an interim or acting role. ICMA's greatest resource is the collective experience of its members. Following several months of review, discussion, and consultation with colleagues, we have refreshed this resource and heartily encourage you to use it as a valuable reference point for your next steps.

On an editorial note, this document uses the terms *interim* and *acting* somewhat interchangeably, although it primarily uses interim to reflect a formal appointment between permanent managers. Similarly, it uses the term governing body rather than *city/town council, board, or commission* to reflect the various forms of elected boards within city, town, and county structures, while being inclusive of all.

Finally, I would like to thank every member of the task force and everyone who wrote and reviewed sections of this resource. Many other ICMA members provided suggestions along the way, contributing personal experiences that demonstrate the importance of connecting with others in our profession. This entire project would have gone nowhere without the guidance of ICMA staff member Rob Carty, who served as the excellent liaison to our task force.

Wishing you the best experience ahead!

Sincerely,

Ed Shikada

Assistant City Manager, Palo Alto, California
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THE INTERIM MANAGER ROLE: IS IT RIGHT FOR YOU?

You have been approached to take on the role of interim manager. In a perfect world, you have served as an assistant manager or as a senior department head for several years; you have worked with the outgoing manager for some time and collaborated on the transition plan; you have a solid rapport with a stable and experienced governing body; nothing is pressing on the management schedule (e.g., budget, elections, collective bargaining); and you have a supportive family. In this ideal world, accepting the role as interim manager may be an easy decision. However, as we all know, the world is not perfect.

What if . . . ?

- You just started as the assistant manager and moved from another state.
- You did not know the manager was on the way out or had a serious illness.
- The budget process was going to be very difficult because of state revenue-sharing decreases.
- The election changed the entire make-up of the governing body.
- The Federal Bureau of Investigation just announced an inquiry into procurement practices.
- You/your wife is seven months pregnant.
- The river is four inches from flood stage.
- The president of the United States has announced a major policy speech in your community.
- Your daughter or son just got accepted to a prestigious college but without financial aid.
- A major employer has announced that it is relocating to another state.
- The landfill geomembrane has failed, and leachate is threatening the water supply.

Unless you have that perfect environment described above, you will need to be deliberative and thoughtful in your response to the opportunity. While this resource guide will provide valuable insights on how to serve as interim manager, this first section will help you decide if the interim manager role is right for you. If you think it through before committing to serve, it will make the transition easier for the governing body, the staff, and your family. It will also help discern the interim manager's priorities, limitations, and expectations.

The very fact you are reading this guide demonstrates your commitment to public service. A basic tenet of the International City/County Management Association (ICMA) is to "To advance professional local government through leadership, management, innovation, and ethics."

A few questions to ask yourself when determining whether the role of interim manager is right for you

- *How did your organization find itself needing an interim manager?*
- *What are the goals and expectations of the governing body, collectively and individually?*
- *Are you physically, mentally, and fiscally ready to serve?*
- *What does the staff think of the situation? Is there somebody more appropriate to assume the role?*
- *What are your professional goals, short term and long term?*
- *What does your family think?*
- *What does the community know and think of the situation?*

The answers to some of these questions may be obvious. For others, consider how and when you'll have the opportunity to discuss them with the governing board (as a body or individually). Raising these issues in an appropriate setting demonstrates the diligence of a manager who understands the importance of clear expectations in a significant undertaking.

How did your organization find itself needing an interim manager?

Did you know that there would be a change in the manager position? What were the dynamics of the previous manager's departure? Many organizations put on a face of orderly transition, but was the transition actually voluntary? If the previous manager was terminated, was it a unanimous decision?

You may never know the reasons for a change in manager, but paying keen attention to the governing body's comments, media reports, and community stakeholders will help you decide if you want to serve as interim manager.

If the previous manager was terminated or asked to resign, be extra diligent in your decision making to serve

as interim manager. Find out as much as you can about the termination by talking to governing body members, staff, or colleagues in neighboring communities.

- How did the governing body behave when terminating the manager?
- Are members of the governing body purposely trying to publicly destroy the reputation of the prior manager or attacking his or her character?
- Do you want to serve as interim manager for a governing body that treated a colleague in a disrespectful manner?
- Has the manager's termination resulted in a hostile community or corporate climate?
- Do you want to manage in that environment?
- Were you involved in any way in the manager's termination?
- Would you find yourself being the organization's face in justifying the termination or being placed in an adversarial role with the prior manager (or his or her attorney) because the governing body does not want to honor the prior manager's employment agreement's severance clause?
- If the previous manager has retired, is there a groomed successor well known to the organization and community? If so, are you that person? If so and you are not that person, you should pointedly but discreetly ask the governing body why the heir apparent was not asked to serve as interim manager.

A manager may resign voluntarily for numerous other reasons as well, such as other career opportunities, academic pursuits, illness, or family considerations. Or the manager simply may not have enjoyed the position or felt capable of doing a good job. If the previous manager was successful, well liked, and respected within the organization and the community, serving as interim manager can be a challenge because expectations are often high. If you choose to accept the role, acknowledge your limitations and differences from the prior manager. If the relationship dynamic affords the opportunity, have the previous manager introduce you to the organization, community, and other stakeholders as the interim manager.

Regardless of the reason for a change in leadership, a good manager has prepared the organization for the change. However, the governing body may not be similarly prepared. It is not uncommon for governing bodies to hope the transition is on autopilot and not want to dwell on the departure of the prior

manager. When you are approached with the opportunity to serve as interim manager, ask the difficult questions: Has the messaging of the prior manager's departure and the selection of an interim manager been well thought out and ready to execute? Is the entire governing body behind the decision to ask you to serve as interim manager? Has the governing body determined a process and schedule for the recruitment for the permanent manager? If so, what role will the interim manager play in that process?

Often the governing body appoints an interim manager whom they consider a top candidate for the position, but not always. Be direct; inquire of the intentions of the governing body as to whether the interim role is being seen as an unofficial trial period and what the prospect is of you serving as the permanent manager. While the offer to serve as interim manager may seem well intentioned, the governing body may be just trying to quell any controversy by immediately appointing an interim manager with the intention of offering the permanent position. Under such circumstances, you could find yourself pressured to accept the manager position permanently without fully vetting the situation. Your candid inquiries will be appreciated and may alleviate many of your anxieties.

In addition to acting quickly, the governing body may view the manager vacancy as an opportunity for change. As you approach your decision, clarify with the governing body members how they view the role of interim manager. What are their goals, concerns, expectations, and timing? Are they looking for an acting manager to make changes? If so, beware of a situation in which the governing body expects you to make changes that would be best made by the new manager.

What are the goals and expectations of the governing body, collectively and individually?

As you have read above, learning how the organization found itself needing an interim manager may reveal a great deal about the governing body's goals, concerns, and expectations of that person. Later in this guide is a section on defining your role as interim manager. The governing body's goals, concerns, and expectations will be the principal determinant of that role. Are you expected to be a caretaker keeping things running until a new manager is selected? Has the governing body members discussed their goals and expectations, or are they just appointing an interim manager because it is something they think they should be doing? Do they expect you to make sweeping changes that should be made by

the next manager? Is there one controversial or charged issue over which the previous manager was terminated and the interim manager will be expected to fall in line?

Don't be afraid to ask and get the answers; the answers will help you succeed if you decide to accept the interim position. It is to the governing body's advantage to have such conversations. A discussion with the mayor and/or other governing board members, both as a whole and individually, can yield good information. Should the governing body be evasive in answering, it could be a red flag or a recipe for trouble. With that said, some governing bodies may not have determined or discussed what their expectations are and will appreciate questions that guide them into a discussion. If you find that it is hard to get clear answers, you should take under consideration that without clear direction, it is hard for anyone to succeed.

Are you physically, mentally, and fiscally ready to serve?

As interim manager, you will be living in a fishbowl. The community visibility will make your personal life vulnerable to public scrutiny just as much as your municipal activities. It can take a toll and you should honestly assess whether you can handle it. In addition, the job itself brings along a great deal of stress, which makes your physical and mental health before accepting the interim role important. Might your current health negatively affect your service to the community? Just as you would expect honest answers from the governing body and staff, you should answer these questions honestly yourself.

As with most things in life, timing is everything. Does the timing of this interim manager position work for you? If you are an assistant manager, the allure of furthering your development and trying out for the manager position can blind you to things that may turn the opportunity into a career setback. You could also miss red flags if you are experiencing some personal financial stress and expect that the interim manager position will increase your compensation. This guide includes a section on developing an agreement that addresses compensation.

What does the staff think of the situation? Is there somebody more appropriate to assume the role?

As you will read later in this guide and as every good manager knows, staff support is essential. Are any of the senior staff also vying for the interim position? Are staff aware of the circumstances around the previous

manager's departure? Do they agree with or understand the governing body's decision to terminate? Do your homework through visual and verbal communication to gain perspective on where staff put their support. This might be difficult if you are coming from outside the organization.

It can be hard to admit that there might be someone who could better fill the interim manager role, especially if you are the assistant manager or have served as a manager in another community. But the ultimate goal is public service and supporting the community through the transition, so if there is someone—maybe the finance director, public works director, or the city attorney—who can do that better, you should suggest this person to the governing body. Maybe there is another assistant who has established stronger key relationships or a retired manager who has already gone through such transitions.

This does not mean that you would not be successful or would lack the confidence of the governing body, staff, and community, but circumstances and timing may lead others to be more suitable right now. Additionally, if there is going to be a competitive search, will serving as interim manager hinder or bolster your performance in the recruitment process for the permanent manager?

What are your professional goals, short term and long term?

How does this opportunity fit into your professional goals? If you have always aspired to be a manager, sought different leadership experiences to prepare for the role, and became a Credentialed Manager, you are probably inclined to serve as the interim manager and be a serious candidate for the permanent manager appointment.

Perhaps you are a senior department head looking to retire soon or someone already looking for a professional change in another community. Would serving as the interim manager disrupt those plans? Could you effectively serve as interim manager while preparing for retirement or interviewing for a position within another community? How would serving, or not serving, as an interim manager be perceived by executive recruiters? Perhaps you are a long-tenured assistant manager who is leading a major project that has been ongoing for many months and you want to see it through personally. Will that accomplishment further your professional goals more so than serving as interim manager?

What experiences and opportunities do you want to be exposed to when serving as interim manager?

Getting to Yes...To a Different Question

My prior community, a very large city, was in a precarious spot. The economy was recovering, but city finances and labor relations were stymied. Voters had approved drastic pension and disability cut-backs following nearly a decade of budget reductions. With a mayoral and council election coming up in a year, the city manager had announced her retirement giving the council ample time to recruit a new manager. Rather than a recruitment, however, the mayor asked me (as the assistant city manager) to take on the interim role through the upcoming election.

Given the volatility of the situation, this was a difficult decision. Accepting an interim position through the upcoming year or more would mean a caretaker role, unable to make significant decisions such as hiring department heads, addressing other personnel issues, and attempting to negotiate settlement of ongoing litigation with employee unions. This would impact both progress toward recovery and my personal sense of effectiveness, so I declined the interim role but expressed interest in permanent appointment.

The mayor and council agreed and appointed me as the permanent city manager, though not unanimously. Labor-supported councilmembers voted against a permanent appointment, contending that an interim appointment would be more appropriate for the times.

The following year was extraordinarily intense. As city manager, my priority was to help the organization move forward despite difficult circumstances. This included attempting to settle litigation over pension reform as well as build community recognition of the need for additional revenues.

Both efforts were ultimately successful, though reached closure after my tenure as city manager had ended. Soon after the November election it became clear that the new mayor would press for a new manager. It was time to leave, with no regrets, but fair to say that not accepting an interim manager role would play out in ways unforeseen at the time.

Ed Shikada, *Assistant City Manager*
City of Palo Alto, California

Would you want to manage the annual budget process, complete a difficult labor negotiation, or resolve a sticky land use issue? These experiences may align with your long-term goals, but consider the interim manager's role and how the governing body will be involved.

What does your family think?

Note: For this section, *family* is defined as anyone close to you . . . those with whom you share your time, talent, and treasure. It could be a spouse, children, parents, partner, and even a roommate or pet.

Being the manager affects every aspect of your life. Increased hours, community visibility, and public scrutiny are a given. However, what does your family think? Do they fully appreciate the opportunity, challenges, and potential sacrifices that come with being the manager, interim or permanent?

It is human nature to immediately think of the personal and professional impact of serving as an interim

manager: prestige, compensation, risk, etc. However, if you have a family, you have probably honed a delicate balance between work, personal life, and family priorities. Serving as an interim manager may upset this balance and require a recalibration of priorities.

Making the decision to accept, or not accept, the role as interim manager extends well beyond you personally.

- What sacrifices will your family have to make?
- Is this a key time period in your family?
- Will a long-planned vacation have to be canceled?
- Does your spouse or partner have to delay or defer his or her personal or professional development while you assume the role of interim manager?
- Is there a relative with a serious illness or a child getting ready to head off to college?

Is this the chance you have been waiting for so many years? How will you balance a discussion within the family as to the exciting opportunity to fulfill your

professional dreams, while asking others to make sacrifices? Regardless of the uniqueness of the opportunity, you cannot make the decision in a vacuum. Your family's support has always been key to your success, but it will be in high demand when you are serving as an interim manager.

What does the community know and think of the situation?

One of the most important roles of the manager is serving as the day-to-day face of the organization. Not that the manager seeks the public spotlight, but many of the important issues and critical incidents are worked by the manager.

- When there is a change in manager, what does the community think of the transition?
- Are you being thrust into an interim role when the community seems to be backing the prior manager and publicly critical of the governing body?
- Are there dynamics of the prior manager's transition that cannot be discussed publicly because of a separation agreement?
- Are you prepared to tow the company line and maintain confidences?

As noted earlier, if the organization and governing body have not settled on a communications message, one of your first critical activities as interim manager

might be to craft and execute the communications plan concerning the departure of the prior manager, the appointment of an interim manager (you), and the recruitment of a permanent manager (perhaps you).

It is OK to decline to serve as interim manager

In preparing this initial section of *Resources for the Interim or Acting Manager*, we decided to also address the choice to decline an offer to serve as interim manager. The organization and community deserve your best effort, and if you cannot provide it because of other professional priorities, family priorities, or health issues, you should decline the offer.

However, declining the offer is not necessarily a binary decision of yes or no. You might make clear that you will serve as the interim manager for a brief period—perhaps days or weeks. You will need to think through your message as to why you are declining the offer, but it is very important for your message to align with the real reasons to protect your integrity.

If, after careful consideration, you decide that serving as the interim manager is right for you, the remaining sections of this guide will help you take on this important role. Good luck and know ICMA and its members are here to support you.

PUT IT IN WRITING: TERMS OF AGREEMENT FOR THE INTERIM MANAGER

Governing bodies move much more quickly to appoint an interim manager than they do to select and negotiate employment terms with a new manager. Thus, as a candidate for the interim manager appointment, you—and the governing body—should take special care to communicate about the terms of the appointment. Commonly, verbal commitments are made before either party has a basic understanding of the essential protections they need to consider. This can lead to legal challenges or, at a minimum, embarrassment at a time when media attention is high. As a professional, do not be overeager to accept an acting manager position before establishing a mutual agreement about the terms of the appointment and committing the agreement to writing. Acting too quickly or casually and forgoing this crucial step could damage your career.

Both parties may believe that a short-term appointment does not require a great deal of detail, but it's common for governing bodies to be overly optimistic about when a permanent manager will be on board, and the interim appointment may be for a longer time period than they anticipate. A written agreement, or at least a letter outlining your mutual expectations, can protect both parties from misunderstandings and hard feelings.

The suggestions that follow apply primarily to an interim manager currently serving the same organization; a manager from outside who is negotiating an interim position may take a slightly different approach (see Appendix C for the Model Employment Agreement suitable for an external appointee). That being said, an external appointee can benefit greatly from reviewing these terms and discussing them with the governing body that is making the appointment. This can help avoid hidden expectations by either side.

At a minimum, your agreement with the governing body should address the following, regardless of the expected term of the interim appointment.

Compensation and benefits

Naturally, the agreement should establish the compensation and benefits specific to the appointment. For an internal candidate, an effective date for compensation and benefits is important in the situation where you were asked to step in temporarily and then the governing

body decides to make it a formal appointment during their search process. This is also the time to discuss and resolve any compensation issues related to cellular phone expenses, vehicle expenses, and other technology.

Term of the interim appointment

The agreement should establish a term for the acting appointment. It's advisable to set a minimum time expectancy—say, three to six months—and follow with a mutually agreed-upon month-to-month extension provision. The agreement should lock in the salary and special benefits for that time period, regardless of whether a permanent manager is appointed before it ends. If you include this provision, both you and the governing body can avoid the sensitive matter of negotiating a transition after the new manager is appointed.

Your employment status

The agreement should clarify your employment status: whether you lose merit/civil service status in the interim manager position and become an “at will” employee. The agreement should also state your ability to return to your prior position in the unlikely event that your interim assignment doesn't work out.

Similarly, your agreement should provide that the interim manager is to be considered a “regular employee” entitled to holidays and working conditions offered to other managerial employees. For example, in one instance a governing body member challenged holiday pay for an interim manager because such a provision was not included in their agreement.

Special legal provisions

The agreement should address legal provisions unique to the chief administrator (e.g., bonding, indemnification, and legal representation). Ask the local government attorney whether you would automatically be bonded in the interim manager role and whether other legal protections would apply. If not, your written agreement should specify that you will be protected.

Legal authority

An essential clause in any agreement is reference to the legal basis and authority vested in the manager

Expecting the Unexpected

I was one year into a new assistant city manager position when the city council unexpectedly voted 6-2 to terminate the city manager. The mayor asked that I serve as acting city manager while a recruitment for a new city manager take place, which he thought might be six to nine months. After much deliberation (and consulting an ICMA Senior Advisor!), I agreed.

Given the point I was at in my career and with small children at home, I was not interested in the permanent city manager position but rather sought to help the organization through the transition. The recruitment I was expecting never was initiated (even though I asked), and over time, I came to the conclusion that the mayor and some members of city council were trying to “weaken” the city manager’s office and attempting to shift power (at least perceived) to the mayor and council. Moreover, the council voted to eliminate funding for the assistant city manager position during that year’s budget process, meaning that I could stay on but only in the city manager role. Complicating matters, I did not meet the residency requirement to be the

permanent city manager, so I had no other option than to stay in the acting city manager capacity.

I decided to put my focus and energy on doing my job and getting the organization through some difficult budget cycles and staffing issues. I figured that if I did my job and did it well, others (and maybe council) would see the value the city manager can bring to the organization. And at least I could sleep at night knowing that I gave it my all. I spent the next two years trying to bring some sense of stability to the organization and get it through some difficult issues while resisting the occasional attempted power grabs by some elected officials. Ultimately, I decided that the current arrangement was best for neither the organization nor me, and I decided to pursue other opportunities. The lesson I learned: Expect the unexpected and know that sometimes things are not quite as they might seem. And get the terms of your acting assignment in writing!

Jason T. Slowinski, *City Manager*
City of Golden, CO

position. This is commonly found in the local charter and ordinances and/or state statutes. Any reservations expressed by governing body members about conveying this authority to an interim manager should send a clear warning message to prospective candidates.

The governing body’s expectations about the authority of the interim manager and its views of the legal constraints on its own powers may be quite different from what the charter says or what you expect as a professional, especially in hiring and procurement matters. An understanding of what’s expected by both the employer and the employee is critical to a successful relationship in any employment negotiation.

A good interview session with the governing body should help you understand its expectations about legal authority and other aspects of the interim role and determine whether those expectations are compatible with your own. You need to understand the political climate in order to decide what terms are appropriate for your agreement and what would

unnecessarily alienate the governing body. Commonly, the “psychological contract” or “chemistry” between you and the elected officials plays a determining role in the decisions of both parties.

Reinstatement

Finally, if the interim manager position is in the organization with which you’re now employed, you must spell out what happens when a permanent manager is appointed—regardless of whether you were a candidate for the position. The agreement should provide for your reinstatement in your previous position with no loss of tenure benefits. You may even want to consider a minimum time period of guaranteed tenure after returning to your previous position; this is because the interim period may include a very difficult policy issue that puts you at odds with the governing body and you may need protection once the new manager is appointed.

SO NOW YOU'RE THE INTERIM MANAGER

Your elected leadership has selected you to run the organization. Whether you actively sought the opportunity or were drafted, here are a few things you should consider.

Remember that they know you

First, relax and trust your judgment. The elected officials chose you because they've seen you operate in your regular role for some time. Your performance and personality have impressed them to the point that they trust you to manage the organization through this transitional period, and the appointment is an expression of their confidence in you. Maintain confidence in yourself and begin to focus on the new role.

Clarify your role with the governing body

As a staff member, you had a more limited relationship with the elected leadership than you will have now. If possible before the interim period begins, establish an expectation of ongoing communication with the elected officials. Make sure you have a very explicit discussion about their expectations of you in the interim capacity. Are you to be a caretaker managing day-to-day operations, or do they expect you to develop or advance an agenda that moves the community and the organization forward? Their expectations of you will be colored by their relationship with the previous manager and the reasons for the manager's departure.

Make no assumptions about the elected leadership's expectations; instead, take proactive steps to elicit those expectations. Become familiar with the strategic plan, annual budget policy initiatives, and department business plans. Inquire whether these guiding documents still have the majority support of the governing body. You may want to document temporary changes in staff reporting. Also from the beginning, schedule regular check-ins with governing board members to ensure that you have routine opportunities to review progress and to discuss any unforeseen challenges or circumstances that arise.

Be honest about your interest in the manager position

Be open and honest with the elected officials about your interest in seeking a permanent appointment to the manager position. Their agenda is community

Maintaining Balance and Boundaries

The fishbowl life of being a city manager is not for everyone. As a manager, I have always worked hard to separate my personal and professional life, and I believed that I was successful with that until shortly after I began my current position. My family and I went to church on Sunday morning, and at the end of services, I found myself being flagged down by the mayor; he wanted me to join a conversation with two other members of the council. A Sunday morning that I thought was family time would quickly turn into a work morning had I not established to the mayor and council members that I don't discuss work during family time.

*Elizabeth Ladner, City Manager
City of South Lyon, MI*

improvement. They have almost certainly made some policy decisions that you might not have agreed with, but remember that it's your duty as a professional to carry out their decisions. Make sure they know you're willing to do what can be done to implement their vision. The ICMA Code of Ethics with Guidelines (Appendix A) provides a foundational framework for fulfilling this role. Reviewing the code can provide new meaning in the context of your new responsibilities.

If you are interested in the permanent appointment, now is the time to start keeping notes on what works, what you would stop, and what you may need to start. During the interim period, determine whether you should take steps to begin implementing any necessary changes by reflecting on the expectation conversations you had with members of the governing body.

Meet with staff

Meet with your new staff; your role has changed. Perhaps as an assistant manager or department head in the organization, you've had conflicts with other staff members over issues of importance. Don't let previous con-

flicts cloud your judgment in managing the organization. If individual fences need mending, mend them. However, don't dwell on these past interactions to the point where you are not a professional or effective leader. Staff members need to know your expectations of them and what they can do to support you. Put yourself in their shoes; this is a new, possibly temporary, situation, and they need to know where you'll be taking them.

Contact community leaders

Make contact with nonelected community leaders: the chamber of commerce, other business leaders, neighborhood leaders, religious leaders, and nonprofit leaders. All these people can give you valuable insight into the community and local issues. They view your new position as important and will probably be willing to assist you in every way they can. And they probably have a different perspective on the community and your organization that can help you find your way early on.

Do your homework

If you have not done so in your previous position, familiarize yourself with the jurisdiction's charter and code of ordinances, the ICMA Code of Ethics and any state ethics laws, the comprehensive annual financial report, the capital improvement plan, the budget, the comprehensive plan, the zoning ordinance, and any imminent or pending litigation. Confer with staff about these basic documents and any likely issues on the horizon—in terms of both the governing body's meeting agenda and day-to-day operations. Make sure you understand the limits of your position in the law and what is expected of you. You may also want to refer to *ICMA's First Time Administrator's Guide* (icma.org/new-manager) for advice on approaching a new position.

Talk with your family

Finally, do not forget your family. As noted in the first section of this guide, you consulted your family when deciding whether the interim role was right for you. Continue to have periodic open and frank discussions about the impact that the position may be having on you and on them. Will you need to spend more time on the job? Will your responsibilities likely cut into what has been family time? How do they feel? What are they experiencing? How do you feel? Be sure to answer all these questions in family discussions. Your family's support is of enormous value. Discuss how you will check in with your significant other, children, parents, etc. Reaffirm and nurture these relationships.

Make a plan for caring for yourself—and stick with it

Being an interim manager will likely place significant demands on your time. Schedule specific time for yourself each day for your own reflection. Whether you take up journaling, commit to staying on a fitness and exercise schedule, eat healthy choices, and/or ensure that you maintain your worship activities and hobbies, you must create time for yourself to rest and recharge. You don't want to burn out in your temporary role.

Approach the interim manager position as you would any new position, because it's new to you. Your relationship with the elected officials, city staff, and the community has changed and will continue to evolve daily. Communication and openness are the keys to an enjoyable, productive period of public service!

THE INTERIM MANAGER'S "TO DO" LIST: THE FIRST SIXTY DAYS

Once you've been appointed as the interim manager, in the coming months you may have the opportunity to guide your community through some critical issues and give advice to the governing body—possibly at a time when the community is experiencing changes, either positive or negative.

As interim manager, you'll need to be prepared for whatever unfolds during this time of transition. Has the city just embarked on a major capital improvement program? Has a longtime department head retired or moved on? Did the former manager leave involuntarily under strained circumstances? Has a natural disaster or man-made tragedy occurred? All these scenarios have occurred while someone was serving in an interim role, and they require a manager to ensure that day-to-day operations are being carried out while advising the governing body on actions they may need to take to address significant events. Here's a checklist of possible steps to take in the first sixty days after your appointment as interim manager. They will help you conduct an assessment of the community and the organization and succeed through your interim period.

Meet with the governing body

Meet with the governing body to review and update them on major projects, service improvements, and policy proposals. In an early meeting, ask the governing body—either as a whole or individually—to respond to questions about the community. Here are some suggestions:

- What are the strengths of the organization? Of the community?
- What are the top issues? Who has information about these issues that can be a resource?
- Are there any “gotcha” or “sticky” issues for the organization, governing body, or community? Who can best brief you on these issues?
- Are there any policies in the strategic plan, budget, or department business plans that no longer have majority support of the governing body?

Give thought to deciding whether these topics would best be handled at a public meeting, in closed session, or individually. Transparency can be served by public discussion, but greater insight and clarity can be

gained by individual conversations. The answers can help you understand the governing body as a group and as individuals as well as serve as a starting point to discuss issues. Also, set regular check-ins with the governing body as a whole to ensure that you are receiving timely feedback on your performance and the direction in which the organization is moving.

You and your staff team can likely do anything the governing body desires; however, you cannot do everything well. Work with the governing body and staff to set the top priorities for the interim period.

Establish yourself and build trust not only with the governing body as a whole but also with each elected official. Meet with elected officials individually and listen to their ideas. You might float some ideas and sound them out before going public. Also set expectations for how and when they will be informed of breaking news such as public safety incidents. Do not surprise the governing body!

Meet with department heads and staff

Meet with department heads and the manager's staff to discuss their goals and objectives, and let them know that you're available to them. Discuss your approach to your work, your expectations, and any assignments—particularly priority assignments—from the governing body. Review major projects and their progress, including any holdups. Establish mutual accountability and responsibility for both ongoing services and special assignments. Ask for their help and extra effort during this period of transition. Also, find out if there are any lingering personnel issues, project issues, financial issues, etc. Build rapport by asking for the staff's perspective on these issues and then determine whether you should take action to resolve any of them. As with the governing body, set expectations for how and when you should be informed of breaking news, including developing issues of concern.

Be sure your previous assignments are covered

Inform the governing body if some of your previous responsibilities need to be reassigned to another staff member during the interim period. Reassignment not only gives you some flexibility and room but also provides a learning and growth opportunity for other

staff members and colleagues. If there isn't capacity to reassign, consider whether contractual assistance for limited time period could be of value.

If you are wearing two hats, remember to check for the potential loss of checks and balances or for other conflicts with existing roles, such as family or nonprofit leadership relationships, and establish firewalls if needed. Consult the city attorney and others as needed to avoid putting yourself in an awkward or audit-provoking predicament.

Attend to the media

Establish rapport with the news media. Be an accurate and willing source to help keep the public informed on governing body priorities and community issues and projects. Brief the governing body on interviews and articles that you believe may appear in the newspaper or on local TV news.

Evaluate the financial picture

Assess the financial condition of the jurisdiction. If you have not had access to the audit team, schedule a meeting with it. Follow up on anything raised in the management letter. Have all the issues been addressed and the changes implemented by the responsible department? If not, begin the work now. Review the current year financials (revenues and expenditures) to be certain that the trends are on target. If they are not, develop and implement an action plan to ensure stability. Nothing will damage an interim manager's credibility faster than bad financial management.

Meet with your ICMA Senior Advisor

Contact ICMA to find the Senior Advisor assigned to your area. The Senior Advisor will bring insight from several years of experience working for governing bodies and managing local government organizations. He or she is a wealth of information, can introduce you to other managers in your state, and can be a sounding board for you. These services are offered at no cost and are intended to help you succeed in your role.

Become familiar with emergency operations

While chances are small that a significant environmental or man-made disaster will occur, you should take time up front to know your responsibilities and legal authority to quickly aid your community during an emergency situation. Meet with your emergency preparedness and homeland security specialist on staff or in the county

Not All Long-Term Issues Require Long-Term Solutions

My tenure as interim city manager was supposed to last about two to three months, just long enough to select a new manager. During that time, the executive assistant, assistant city manager/administrative services, communications director, and municipal court judge all moved on from the city. The assistant city manager had been serving in the dual roles of finance and IT [information technology] director.

The question, when departures occur during the interim, is how to address the vacancy: permanent hire, temporary hire, appoint an acting to the vacancy, or simply go without and spread the work around. We did a little bit of everything, considering issues to be addressed, accommodation to the new manager, and available coverage in-house. The common theme was that we kept the vacancies in one form or another.

The result is that our new manager was able to make some changes from the start without having to go through heavy personnel lifts. Even if I had selected people with outstanding qualifications, the manager needs, particularly at the higher levels, people who fit his or her style.

*Heidi Wachter, City Attorney
City of Lakewood, WA*

where you are employed. Obtain an overview of the incident command structure; know where, when, and how to access the emergency operations center; and learn what resources or capabilities your organization has to respond. Also, be aware that there are very specific processes and rules for obtaining federal funding assistance. Make sure that you have someone who knows these processes and rules available to you.

Reach out to managers of neighboring jurisdictions

Occasionally, interjurisdictional issues are worked out quietly at the staff level prior to presentation to the governing body. As manager, determine whether these

issues exist between your jurisdiction and a neighboring jurisdiction or another level of government (i.e., state or federal agency). Additionally, the neighboring manager may shed some objective insight as to your governing body's temperament, issue management, and communications.

Tackle a long-term issue

Finally, tackle a long-term issue. You may be able to begin working on an existing problem or issue to give the new manager a head start when he or she comes on board. You and your staff can gather information, develop possible solutions, and test out alternatives

with the governing body. When the new manager arrives, he or she can review the work and begin implementation. This is a great way to demonstrate the staff's ability to come together and continue moving the organization forward.

For additional advice about the first steps for an acting manager, review the previous section entitled "So Now You're the Interim Manager." Remember, the first sixty days will be a transition period. How you assess the environment, the personalities, the issues, and the challenges will have an impact on you, your staff and fellow co-workers, the governing body, the community, and the future manager.

DEFINING YOUR ROLE AS (INTERIM) MANAGER

As the interim manager, you were appointed to manage the day-to-day operations of the local government because the governing body believed that someone was needed to perform this role. How you perform the job—the role and style you assume—depends on many factors, including the following:

- Are you a candidate for the permanent position?
- Are you new to the organization?
- Is the manager's departure causing turmoil, or is it a timely opportunity for needed change?
- Has the governing body expressed a clear desire for change? Or are you expected to be a caretaker until the permanent manager is selected?
- Was the former manager competent and doing a good job?

Basic principles

The answers to these questions will help you define your role as an acting, but regardless of the situation you step into, you are THE manager. To successfully fulfill the responsibilities of this position, you need to understand the following principles:

Management rules don't change. Priorities may change, but basic management rules and techniques still apply. For instance, communication, especially if you are an unknown who has come from outside the organization, becomes more critical. Some issues that are considered minor in one community may be considered major in another and need special handling. If staff and governing body are informed, they can alert you to these issues. If you are coming to this role from within the organization, it can be equally important to review communication needs with staff and revisit assumptions of what they think you know. It is also important to keep elected officials equally informed, providing facts and unbiased information.

Don't compromise your principles. One of the first rules for an interim manager is not to take any actions that you don't truly believe in, regardless of the pressures or the situation. One of the best ways to gain the confidence of the governing body and staff is to act in accordance with your principles and the ICMA Code of Ethics with Guidelines (Appendix A).

Rely on your staff. You need the help of your staff, and you should let them know it. Expect it. Acknowl-

edge it. The more you ask of staff, the more quickly you'll be able to judge whom you can trust for what. Of course, encourage ownership of issues (especially where staff is covering issues you previously handled), and give credit where credit is due. It is a good practice to rely on staff's expertise to assist you in your new role. Remember that they will need regular communication from you so they can best support you.

The "hatchet" role

If you're from outside the organization and not a candidate for the permanent position, your role as interim manager may involve making some unpopular decisions, "clearing the deck" for the permanent manager who will follow. These decisions require some forethought, however, because you don't want to make major changes that might be reversed by the new manager, creating disruption and confusion.

The rule about maintaining your principles is particularly important in this role. There's often at least one department head whom some elected officials are trying to get fired. While there may be need for drastic changes, use caution when evaluating "suggestions" from the governing body or subordinates. Any new manager (even an acting manager) will be pressured to implement programs or take personnel actions that were rejected, possibly with good reason, by the previous manager. Communication with the previous manager may be very helpful if he or she is available for consultation. Also, keeping in mind the ICMA Code of Ethics, personnel matters should be handled on the basis of merit and governed by fairness and impartiality in all cases.

The caretaker role

If the governing body clearly wants you to be a caretaker, you'll probably not be pressured to make radical changes. But within a short period, you're bound to notice things that you believe could be improved. Don't be reluctant to take appropriate action to implement positive changes.

Your role as a job candidate

If you're a candidate for the permanent manager position, you may have a very understandable reluctance

to do things that might not please the people who will make the selection. You can't lose many votes and still hope to get the job, and you probably need a paycheck. At the same time, however, it's particularly important to do what you believe is best for the community and the organization in your role as interim manager. In a sense, your tenure in the acting role is like a long-term job interview, but you need to resist any temptation to let the selection process affect your decision making in hopes that you'll improve your chances of being appointed.

It will also be important to maintain an appropriate distance from the selection process for the new manager. Ethically, you should not be involved in that process if you are a candidate. Also, understand that your role with the governing body may change depending on whether you are a candidate for the permanent position. Some elected officials may want to keep a distance as well to ensure fairness of the selection process with you and other candidates. For more on this issue, see the following section, "The Interim Manager and the Search Process."

Trying out the manager role

If you're a candidate for the permanent position or deciding whether you wish to be, remember that this interim period is a time not just for the governing body to evaluate you but also for you to evaluate the governing body and the job. One resource that may help you is *ICMA's First Time Administrator's Guide* (icma.org/newmanager). You will need to manage the same as you would if you were selected for the permanent position. Only in that way will you be able to see how the governing body, the community, and the organization will react to you. Then you can make an honest evaluation of whether you will fit.

If you have to modify your style too much for your comfort level, think twice before you accept the permanent position if it's offered. Don't expect things to change for the better after you're selected.

Many managers who have had short tenure in a position will admit that they did not have good insight into the position before they accepted it. Had they known the true picture, they would not have accepted the position. Note that under the Guidelines to the ICMA Code of Ethics, two years is considered the minimum tenure in a position, and it is the candidate's responsibility to ascertain the terms of employment before accepting a position.

While there may be some differences in how interim managers are treated compared to permanent ones, you have the opportunity to get real, firsthand insight into whether you want a new role with the organization. Take advantage of it!

Handling important and difficult decisions

Interim managers are usually appointed with expectations of either (1) seeking the permanent appointment or (2) serving in a caretaker role with no intention of seeking the permanent position. Your interest in the permanent manager position is a major factor in how you handle important and potentially difficult situations, such as terminations, the hiring of department heads, and key budget issues. As interim manager, you should recognize your intentions and make them clear to the governing body. It is fine to accept the interim role without first knowing whether you intend to be a candidate for the permanent position. However, once you know your intention, it is important to openly communicate it.

If you don't intend to be a candidate, it is your obligation to make that known as soon as possible because your candidacy could affect the willingness of other applicants to apply. Therefore, you should plan on announcing your intentions prior to the recruitment announcement being released.

If you do intend to be a candidate, be open about your interest. Advise staff that you intend to seek the job, that you intend to perform the interim role to the best of your ability, and that your relationship with them may change both now and in the future. Similarly, communicate to the governing body that you do not intend to defer important or difficult decisions until a permanent manager is appointed, and be sure they agree. The decisions you make give you opportunities to showcase your management skills and demonstrate your qualifications for the permanent appointment—and are often critical in determining whether you're selected. But if the governing body asks you to defer important decisions, consider whether that's a "red flag," suggesting that they don't take your candidacy for the permanent position seriously.

Whether or not you are seeking the permanent position, some decisions are properly deferred until the new manager is appointed but others need to be made regardless of your interest in the position. These include ongoing employee disciplinary decisions, communication decisions such as interaction with resi-

Where to Be, or Not to Be

As the interim city manager, a concern second only to whether you want the full-time gig is whether to move from your own office to the city manager's. Depending on your location within the organization, it may be a no-brainer to move. If your current office isn't at city hall, you probably need to switch offices in order to be effective, especially if the interim phase is anticipated to last more than a few months. If the city council has already made it clear that you are its preferred candidate as city manager and a recruitment process isn't being pursued, then by all means you should move into your new and future office.

However, outside of these scenarios, the question really does rely more on the political landscape, on whether you need to move into the office to be legitimized as the leader in the short term, and on whether you intend to apply for the city manager position. If physically being in the city manager's office is necessary to legitimize your authority, then do it (though consider the implications). But if you

could lead effectively in either office, then think about the message you are sending if you stay or if you go. Even if you don't see the physical office as meaningful, it has meaning to other people.

When appointed interim, I was approached by a majority of councilmembers encouraging me to take the full-time job and uninterested in recruiting the position. My career path and personal life, though, meant that I would likely need to move within the next 24-36 months, and I felt the city needed to hire someone with a longer-term commitment in mind. Knowing this, I intentionally took the interim role to provide a smooth transition and to provide stability. I also purposefully did not move offices, despite being encouraged to move several times—again, by folks who perceived that I would be the logical next choice for manager. That office has meaning to people, and when you move to it, or you don't, it sends a message despite your intention.

Anonymous

dents and the media, and budget decisions. If you're the interim manager during your community's budget season, you'll be required to prepare the annual budget and make the decisions the manager has to make. Some budget decisions can come up at other times as well, however—for example, decisions about operating and capital budget implementation, revenue generation, taxes, bonding, and funding new projects. Here again, communication with the governing body is key.

Unless a critical vacancy occurs, key personnel decisions are often best deferred until the permanent manager is selected in order to provide that individual with the opportunity to make decisions about key staff members. In some cases, filling a vacancy may be critical to operations, and proceeding would be in the best interest of the organization. You don't want to be perceived in a hatchet role for the governing body, and you must ensure that any personnel decision is being made for a sound reason. This is also your ethical obligation.

Act with confidence. With important decisions that must be made, it is important to act with confi-

dence in the best interest of the organization. If you're seeking the permanent appointment, it's important to show leadership when making these decisions. Your assertiveness and confidence will indicate to both the governing body and the community that you're ready to serve as a manager.

In summary, if you're appointed interim manager, you may serve for six months or more. During that time, decisions will have to be made. The suggestions provided here are broad guidelines that can help you determine which decisions you can make and which you can defer as determined by the needs of your community, the wishes of the governing body, and your plans relative to the permanent manager's position. Also, know that your peers and resources from ICMA, ICMA Senior Advisors, and your state professional association are available to assist you during your time as interim manager. Colleagues can provide an important unbiased viewpoint and may have themselves faced similar difficult decisions. Use these resources.

Help the governing body understand the boundaries

As you talk with elected officials about accepting an interim manager position, and as you establish yourself in the role, it's important to clearly identify yourself as a professional. Become familiar with the legal basis of the manager position, particularly regarding employment practices and governing body involvement in administrative matters. Discussions with the governing body regarding these issues can be very important in the beginning of serving as an interim manager. In a subtle and nonthreatening but clear way, demonstrate your knowledge of these legal provisions and your commitment to the ICMA Code of Ethics.

The boundaries with the governing body or with staff may likely be tested during your tenure as interim manager. Some members of the governing body may view the interim period as an opportunity to step outside their legal boundaries. They may perceive the interim manager as temporary and thus easier to challenge. For example, they may attempt to direct the actions of employees, tell you to make specific personnel decisions, or meet in executive session in violation of the rules. When such incidents occur, obtain the facts and discreetly discuss the matter individually with the member(s) of the governing body as promptly as possible. You will need to be prepared to stand your ground. Remember, it is your duty to carry out

the functions of your position in accordance with the responsibilities set forth with your legal as well as your ethical obligations. When the governing body understands that you know the boundaries, it is much less likely to try to overstep them.

An understanding about boundaries is particularly important when you need to fill a vacant department head position during your tenure as interim manager. Normally, as a professional courtesy and for managerial reasons, it's best to delay such appointments until the new manager is on board. But if a department has a critical need for leadership that can't be satisfactorily met by an acting assignment, an exception may be warranted. If it appears that a new manager will not be appointed in the near future, the interim manager should communicate his or her recommendations for action to the governing body. A caution here is that you make it clear that you're not asking for permission to fill the position if, as manager, you have the legal authority to do so. If you ask, you're opening a door that's not good for the form of government.

Dealing with a governing body that appears to be deliberately overstepping the boundaries can be very difficult for an interim manager, particularly one who has not had a great deal of experience working directly with elected officials. If such activity continues, you may want to consult the ICMA ethics advisor or other managers who have had similar experiences.

THE INTERIM MANAGER AND THE SEARCH PROCESS

The first questions after a manager announces that he or she is leaving will likely be: What new job is he taking? What will she be doing in retirement? When is her last day? Who will be taking over during the interim?

The next likely questions center on the search process: How long will it be before a new manager is in place? When will the search begin? Who will be involved in the selection process? Generally these questions come in rapid succession, and if the manager's resignation is a surprise, a plan for the manager search needs to be developed quickly, if one is not already in place.

The governing body has the responsibility for hiring the new manager. However, many elected officials are part-time and may not have conducted a search for a chief executive before. Depending on their backgrounds, many may never have hired an employee in their professional lives. The governing body will need assistance in searching for a permanent manager.

The interim manager's role

The ICMA Committee on Professional Conduct, charged with responsibility for enforcing the ICMA Code of Ethics, has advised that members should not play any role in the recruitment process if they are or might be candidates for the position because it would pose a conflict of interest. As the interim manager, you would have an obvious conflict of interest if you're a candidate for the permanent position. You could unintentionally influence the selection process in your favor, and you might possess information about other candidates that could give you an unfair advantage. Even if you would not take advantage of your position in this way, the perception is there.

And even if you're not a candidate for the position, you should not be the point person in the recruitment process. Many interim managers initially believe that they do not want to be a candidate but later change their minds and seek the position. If you change your mind, any early involvement you might have had in the selection process could be misinterpreted and might even hurt your chances of being selected. You're also going to be very busy running the city or county, and you'll need to devote your efforts to leadership and management of the organization, not to the recruitment process.

All that notwithstanding, as interim manager you will often have to answer questions from staff and the public. Therefore, you'll need to be aware of the basic timetable established by the governing body for filling the position, to appoint a staff person or persons to be the primary resource for the media and the governing body, and to ensure that the basics of the recruitment are being handled in a timely and proper fashion.

Because you're the interim manager, it's likely that prospective candidates will contact you directly. They'll be most interested in whether you or other staff members are applying for the position, but you should also prepare yourself for questions about how you like working with the governing body in your community and what the major issues will likely be over the next few months. Whenever you respond to questions from prospective candidates, you should remain professional and totally ethical. Answer questions honestly but without revealing confidential or compromising information or offering personal opinions about elected officials, the organization, or others.

How you can help

As for any important issue before the governing body, the staff needs to prepare the elected officials to make informed choices by gathering information. Early on, you should select a staff person to be the primary contact and resource for the elected body. This could be a department head, someone from human resources, and/or a staff member in the manager's office. If the elected body appoints a selection committee, try to select a staff person who can work well with the committee members. And, of course, any staff member involved in the search process must be able to maintain confidentiality.

Next, find out how the search process for a new manager has been conducted in the past in your jurisdiction. If you were not there when the last process took place, ask staff with longer tenure. Contact other jurisdictions that have recently gone through a search process. Gather any relevant documentation and provide it to the governing body. To aid in shaping the recruitment plan and the job advertisement, the assigned staff member(s) should be able to provide the governing body and the executive recruiter with

Communicating Your Intentions, with Intention

The city manager unexpectedly announced that he was leaving the organization, and I was appointed interim city manager. The decision to accept the interim appointment was an easy one for me. Now I had to decide whether I wanted to be a candidate for the position. For some, this is also an easy choice, but for me, it required additional consideration. I figured that a bit of time in the interim position would help me make up my mind, along with helpful discussions with my family and trusted colleagues. One colleague suggested that I consider several issues: (1) timing: he suggested that I consider the larger personal context of the decision, which involved me thinking about how important it was for me to ensure that my middle school- and high school-age boys were able to stay in their current school situation; and (2) how my relationship with the governing body would change if I were a candidate versus if I were not a candidate. For me, thinking about these two issues and what was most important at the time for me personally, as well as what was best for the organization, weighed heavily. Ultimately, I decided not to be a candidate for the position.

I believed that it was my responsibility to immediately make public this decision along with my reasoning, and to do so before the recruitment process began so that other possible candidates would know if there was an internal candidate or not. I felt that this might affect another person's decision to apply, and I wanted the city to be in the position to have the best candidates possible. I first informed the governing body of my decision, and then informed city employees via a personal message, and finally notified the city's hired recruitment firm and media. This decision is an intensely personal one, and pressure will come from many angles, not the least of which was the pressure I felt as a female in the profession. I recommend that professionals in similar situations give the question careful consideration and the thought that it deserves while not being unnecessarily swayed by what others may want. In the end, this will be your career path, which always must be taken in the broader context of everything happening in your life at the time.

*Diane Stoddard, Assistant City Manager
City of Lawrence, KS*

- Suggestions on where to place ads to gain the most exposure to qualified and diverse candidates
- A copy of the job description, including the attributes and desired qualifications sought
- A copy of the compensation plan related to the city manager.

If at all possible, the staff person(s) you have appointed should take on initial research tasks, such as determining early whether the governing body will be using a search firm. Putting an ad in the local paper probably will not produce a strong candidate pool, which is why an experienced executive recruitment firm is beneficial. But as this is a highly competitive field with many very qualified firms, there is a good chance that since the announcement of the previous manager's departure, executive search firms have contacted members of the governing body about serving as the jurisdiction's executive recruiter. So the govern-

ing body needs to be both deliberative and transparent in its vendor selection process, and here again, you and your staff can prove beneficial in that ICMA can provide members with a list of search firms that specialize in local government positions.

You can also provide crucial guidance. If the organization must go through a competitive solicitation process for a search firm, it helps to know the timeframe or duration of the recruitment process. The cost of hiring a search firm (ranging from \$10,000 to \$50,000 plus out-of-pocket travel expenses) may be too steep for some jurisdictions. However, if affordable, a search firm can provide an important bridge between candidates and the governing body. It can also be responsible for the logistics of the entire recruitment process, from creating the advertisement to sourcing candidates, screening résumés, conducting background checks, setting up interviews, and aiding with negotiations.

But even if the governing body hires an executive recruiter, you may be the only one in your organization who is aware of such recruitment resources as the ICMA Job Center and newsletter, the National League of Cities newsletter, and the state municipal league website and newsletter. Here are several resources that can help an elected body determine how to conduct its search (See Appendix B).

ICMA publications. ICMA has publications specifically written for elected officials about the recruitment process (e.g., *Recruitment Guidelines Handbook*). ICMA members can download these documents from ICMA's website at no charge.

ICMA Senior Advisors. As retired managers, ICMA Senior Advisors can be very helpful advisors. Since they are neither vying for the position nor getting paid to conduct the search, they are objective. And as former managers, they have been through recruitment processes themselves.

Human resources. The organization's human resources director or staff can also assist the governing body in its search. Their professional expertise in recruitment can be useful, and they are accustomed to keeping candidate information confidential. The human resources director may also be the administrative or logistical point of contact if using an executive search firm.

Other outside sources. Other sources of assistance for the recruitment process can include managers in nearby jurisdictions, assuming that they are not applicants for the position themselves, or retired managers in the region or state. Many municipal leagues can provide information on how to conduct a recruitment and may even be aware of possible candidates.

Key questions about the search process

Each governing body must determine how the selection process is designed. Here are some key questions that need to be answered before the process begins:

- Are there any major issues or milestones that will drive the timetable of the recruitment process? (For example, how might a forthcoming election affect the search?)
- How long does the governing body expect the recruitment process to take?
- Will a search firm be hired?
- Who is the point person for the search process?
- What skills, experiences, key attributes, and management style will the new manager need?
- How and by whom will applicants be screened?
- Will residents and business leaders be involved in any part of the process?
- How would the governing body like to be updated on the process and how often?
- Who will serve on the interview panel(s)?
- How and with what information will the media be informed? (State law may govern this in some cases.)
- How will a top candidate be selected?
- How will a background and reference check of the top candidate be conducted?
- Who will negotiate the terms of employment with the top candidate?

Finding a permanent manager is one of the most important decisions a governing body makes, and addressing the topics above can help ensure a successful process and outcome. Whether or not you're a candidate or are selected for the permanent position, you can make sure your governing body has the resources it needs to help guide it through this important process.

SURVIVAL TIPS FOR THE INTERIM MANAGER

Even after the tasks of defining roles, building trust, and shepherding a search process are in hand, there remains the question of how to come through that part of your career journey as interim manager better for having done it. Whether you're asked to be the interim manager in a time of stable transition or you're thrust into the position by sudden circumstances, every interim manager can use a few survival tips to keep this transition time in perspective and even find the opportunity to enjoy it. The following tips don't appear in order of priority (although keeping a sense of humor might indeed be the most important of all!).

Keep your sense of humor

When you're home alone with your three-month-old daughter, and your mayor calls and tells you that your mentor and manager has resigned and that he wants to talk to you in his white van outside your home in minutes—you have to find something to smile about. A lot of things happen unexpectedly during a time of transition, and you have to learn not to take yourself, your job, or life in general too seriously.

Serving as interim manager may be a once-in-a-lifetime opportunity, but it doesn't mean you need to lose your sense of humor about things that may happen along the way. If you can't laugh and find the silver lining in a situation, neither will your staff. Many on staff, in the community, and among the elected will look to you to maintain calm in the storm. Remember that things will not go perfectly. Have fun with the job and enjoy it as much as you can. Remember, too, that anything that doesn't kill you makes you stronger.

Don't take it personally

Regardless of whether you are seeking the permanent appointment, one of the backdrops for interim managers is that question of who is actually going to get it. This necessarily results in comparisons between your actual performance and that of the idealized manager whom someone thinks is out there. You can't take it personally; it is doubtful anyone is hoping for the worst, whether it be that you do a poor job or that the organization get a poor manager.

Try to remember the core interest that everyone shares at this point: that the organization remains

strong and progresses in the desired direction. Concerns regarding your performance may well be coming from people who do not even know you. When they are coming from those who do know you, perhaps take it as constructive criticism. Again, it is not about you so much as it is an expectation for the organization that is not being met. These concerns can create the foundation for valuable communication going forward. Embrace the interest in the organization rather than focusing on the concern with you personally.

Similarly, if someone else becomes the manager, it is not at all unusual for people to resist change. Sometimes this can come in the form of praise for you and criticism of the new manager. Resist any feeling that this is a testament to the wonders of your management. It just as likely results from fear of change.

Communicate, communicate, communicate

Regardless of how you became interim manager, it's important from the get-go to communicate—with the governing body, the staff, and the public. There's no greater ally in your transition than communication. It's a fact that, in a void of information, people make stuff up!

In communicating with the elected officials, be sure that they have defined their expectations for you and that you have outlined your expectations as well. In turn, set expectations for staff and provide them with as much information as you can. Open communication will help you build relationships, alleviate their fears, and garner their support and assistance. Finally, in communicating with the public, be honest and open about issues.

Communication can take many forms, including those made possible by new technologies. Take advantage of opportunities to use all forms of communication that are available to you. Ensure that the medium you choose is appropriate to the audience and the message. Use of social media, e-mails, phone calls, and newsletter updates can be effective tools to inform the community about issues and achievements.

It's your decision, and it can be lonely

How many of us, as assistant managers or department directors, have played Monday-morning quarterback when the manager has made a decision? It's so easy

to say what you would do if you were the manager. Guess what? That's you now, and the call is yours. That can be a very lonely feeling, especially if your style is collaborative. If consensus can't be reached, all eyes are on you. Trust yourself. Use all the resources at your disposal to make the best decision you possibly can.

Know when you need outside help

Even though the buck might stop with you, that doesn't mean anyone expects you to know it all. As a matter of fact, it's just as important to know when you need additional resources.

An issue may arise where your best course of action is to hire an outside person to assist with issues that are new to your organization. People sometimes use transitional times as a way to push their own agendas. When this happens, make sure you have the resources that your organization needs to make the best decisions. These may include outside attorneys or public relations firms that can help you think through issues as well as short- and long-term approaches to a problem. Additional resources can also be a huge help in communicating in the community as well as in the organization. This expertise can save a great deal of time and effort in framing the issues and making sure that everyone is on the same page.

Be organized—or have a staff that is

An organized approach will help you deal with the issues that will inevitably face you as interim manager. First, you need to get all the information you can regarding issues and projects in which you may not have been involved. Second, you need to make sure that you have a system for keeping track of the most important things you want to accomplish in the transition period. As interim manager, you may be tested to see if you know what's going on. It's tough to have a handle on all the issues, but if you have a system, you can get the information you need quickly and easily. Your support staff should be able to assist, but if not, you need to do it yourself. It will pay off when an elected official comes in to ask you something, and you can easily pull out the needed information.

Rely on your support system

Earlier in this guidebook, in reference to the decision to become an interim manager, we referred to "family" as anyone close to you—folks with whom you share

your time, talent, and treasure. It could be a spouse, children, parents, partner, and even a roommate or pet.

By now you have experienced firsthand how being the manager affects every aspect of your life. How has this role affected the delicate balance between work, personal, and family priorities? Serving as an interim manager may have upset this balance, requiring a recalibration of priorities. Your family's support has always been key to your success; be explicit about ensuring that they remain engaged with you through your journey as interim manager.

It's fun—but you might not realize it until it's over

When opportunities come your way, you don't always take the time to appreciate the experience, exposure, and achievements that come as well. Remember that your tenure as interim manager is another opportunity to make a difference in your community. If you put your transition time in perspective, you can have fun with the opportunities and grow tremendously. The experience can be very rewarding, both personally and professionally, and you don't want to lose sight of that. When you look back on the experience, it will be with pride and a sense of accomplishment for doing your best for your community and organization.

Appreciate your newly acquired added value

When a new manager is appointed and you return to your previous role, remember that you had an important job before you became interim manager. You now bring added value to the organization from having been in the lead for a time. You have built relationships during the transition, and those relationships don't go away. In the end, the organization is stronger for having had you in the transition spot, and you have grown and developed both personally and professionally. The other bonus is that you no longer have to take all the elected official calls or deal with all the personnel issues, and you can sit back and make a difference from a somewhat less visible spot.

Remember what is really important

Another story from one of the coauthors: "It wasn't long after I became interim city administrator that a police officer motioned to me during a council meeting that he needed to talk to me. He told me that my husband had taken our youngest daughter to the

hospital with a gash in her head. He knew nothing more. I immediately left the meeting. Gutsy? Stupid? I don't know. What I do know is that my family is my first priority. The message became clear to the council, and they supported it."

Involving your family in your work can also be rewarding. Says a coauthor: "My daughter and son know where I work and why I work. They know where the candy jar in my office is, and they know that city hall is a friendly place where community helpers work.

I am very proud of that and wouldn't be as good a public servant without my family to ground me in what is really important. It is not always easy, but nothing worth doing is."

The interim manager role can be all-consuming. You'll be doing a new job. Make sure your job is what you do. Don't let it define who you are. Make and keep dates with your partner, your best friend, your children, your grandma. Don't let climbing the career ladder keep you from the most important things in life.

PEER AND STAFF SUPPORT FOR THE INTERIM MANAGER

For the interim manager in a public sector environment, garnering the support of colleagues and staff can be a key to success. The advice of your peers is important regardless of your position. Both new and experienced managers can learn from colleagues with the same or similar responsibilities—sometimes by simply using them as a sounding board. Further, because an interim role may become permanent, staff support is essential to your success.

Peer support

Peer support is critical for a first-time inexperienced manager or an interim manager in an unfamiliar situation or community. A good way to begin to develop such support is to identify one or more people who can serve as peer resources to you during your tenure as interim manager. If you have existing peer resources, continue to draw on them during this transition period. These peers may include past colleagues or managers or assistant managers in nearby jurisdictions or in your state. Neighboring managers may be able to alert you to potential potholes in your new assignment, so it makes sense to reach out to them quickly and ask them to share with you their perspective of the situation.

Find someone you can trust. If you do not have peers in the public sector, identify someone else you trust and with whom you feel comfortable discussing these matters in a confidential manner. If you reach outside the public sector, seek out someone who has similar responsibilities (a sizable budget and many people doing diverse jobs).

Be proactive! Even experienced managers may wait until a problem is nearing the crisis stage before contacting a colleague. Recognizing a potential problem and seeking advice early can help you succeed in your assignment. However, if the problem is upon you, be open with your peers. Tell them you want candid and honest feedback. You must be able to hear constructive criticism and deal with problems quickly and effectively in order to provide a solution.

Staff support

It is important to remember that the entire organization is affected by the change in leadership. This

change can lead to uncertainty and anxiety. Your assessment of the organizational environment will affect your relationship with staff. If the environment is highly political, you will need to focus on pressing needs and demands so staff support is essential. If the previous manager was terminated, the organization may be somewhat fragile, making staff support even more important. Reassure staff that, during this transition period, you are committed to the organization and you value them. It goes without saying (but we will, anyway) not to make any negative comments about the departed manager, the elected body, or anyone in the organization.

As early as possible, meet with department directors, members of the management team, and other key staff. Your contact with these personnel early on will help reassure them that the organization will survive and has a leader in you as interim manager. Moreover, they need to hear from you about your ideas and to understand what you expect and what you believe is important in the organization. If you already know about any issues that will require a great deal of your time to resolve, tell them and ask for their help in keeping the organization looking and moving forward. It will mean extra work during the transition period, but everyone needs to up their game in support of the organization. If there are areas that you cannot appropriately address with them, be honest and let them know why. As much as possible, stay in communication with them about what is going on and what you are doing.

If the staff is small enough, invite them to a gathering and show them that you're "real and open to their input." Develop an open-door policy and recognize that while you may be inclined to put this off until you're settled in, it needs to happen sooner rather than later.

Assume the leadership role. As the interim manager, you should begin immediately to function as the manager and leader of the organization. Make sure you understand your role as defined by the city's charter and any applicable state statutes, rules, or regulations.

One of your major responsibilities is to maintain the delivery of services to the community. This usually does not require the interim manager's immediate attention, and if that's the case, express your apprecia-

tion to staff and encourage them to keep up the good work. Conversely, staff should realize that you expect them to let you know if problems arise.

At least temporarily, you may be assigning and delegating tasks to people who were your peers, friends, and possibly even superiors. Although you may seek and encourage input from them, you're now responsible for making the final decisions—so make them. Committees serve an important function, but don't be drawn into the habit of making decisions by committee. And don't be overly eager to placate disgruntled employees who may question your appointment and decisions. Should such employees exist, it is important to address their doubts in a timely and decisive manner.

Ideally, major staff changes should await the appointment of a permanent manager. However, if you need to make a change, remember this may affect your ability to manage during the transition and comes with its own challenges.

Help staff help you. Issues requiring your immediate attention need your leadership and guidance. For other issues, you must delegate and assign tasks in a manner that makes clear what you expect to be accomplished and how. Even though you may be immersed in dozens of issues and assignments, the key to effective delegation is to follow up on delegated assignments to check progress and provide further clarification and direction as needed; forgoing follow-up can send a signal that the assignment is a low priority, and staff may neglect it until it comes back as a bigger issue for you. Open and timely com-

munications can help keep this from happening.

Let the staff know how you want to be updated on progress and with what frequency. A time-proven technique that might be useful is to schedule regular operations meetings with key staff to review progress on assignments and, of course, make additional assignments. Such meetings will help you focus on functional areas and allow you to provide feedback that could be critical to the successful completion of assignments. Just as importantly, don't forget to offer encouragement, acknowledgment, and thanks for good work.

Be accessible. You may also want to establish some type of open forum where staff may ask questions and you can provide information. Showing that you're accessible helps build teamwork and camaraderie that can increase organizational performance. To enhance communication between you and staff, consider holding working lunches, visiting worksites, and generally being visible throughout the organization on a regular basis.

As the interim manager, you have been appointed to lead the organization during a time of transition. Your appointment is a vote of confidence that you have the skills, abilities, and talent to assume this responsibility. In your leadership role, it is important to establish an environment that is both positive and constructive, one that encourages and values teamwork in provision of services to your citizens. It makes sense to use your peers and the staff to assist you in carrying out the mission of the organization. Remember, you do not have to—and shouldn't—do it all alone.

ETHICS AND THE INTERIM MANAGER

The mission of ICMA is “to advance professional local government through leadership, management, innovation, and ethics.” Therefore, it’s not surprising that ethical conduct and behavior are at the heart of the profession. When you serve as interim manager, your ethical decision making can be complicated by a number of factors, including your personal decision concerning candidacy for the permanent position. For this reason, it would be a good idea to take a look at the *ICMA Code of Ethics with Guidelines* (Appendix A). Moreover, your conduct as interim manager may be governed by state ethics regulations as well as by the ICMA code, and those state rules vary widely. Seek the advice of your attorney to fully understand how they will affect you. Do not assume that anything about state ethics regulations for you as the interim manager are the same as they were for you as a member of staff. Do your homework. And remember that the manager position is subject to a greater degree of scrutiny than other staff positions.

A clear understanding of the manager’s authorities enumerated in the charter or policy documents is important. As interim manager, you may be pressured by the governing body or other stakeholders to make certain hiring decisions and procurement choices because of both an assumed lack of knowledge and your inherent desire to serve.

Becoming the interim manager

Whether you’ve already accepted the position of interim manager or are still considering the matter, it’s important to remember that you have made a commitment to serve the best interests of the community.

In most cases, the departure of the former manager, even if it was amicable, creates an anxiety-filled environment for the staff and affects elected officials as well. Your willingness to serve in this capacity should have a stabilizing effect by providing assurance that the community’s business will continue to be taken care of until a permanent manager is appointed.

If you are offered the position of interim manager, make sure that you are in a position professionally and personally to serve until the new manager is hired. If you are planning to leave the organization for any reason during the likely interim period, you should decline the offer.

Ethics and the recruitment and selection process

Once you’re the interim manager, whether or not you’re a candidate for the permanent appointment, you should avoid actions that may appear to influence the recruitment and selection process. If the elected officials have chosen to contract with an executive recruiter, you should direct a member of staff, such as the human resources director or city clerk, to work with them on selecting the recruiter, administering the recruiter’s contract, providing information to applicants, and arranging interview trips for candidates.

If the elected officials choose to tap expertise within the organization rather than hiring an executive recruiter, you may find yourself in a difficult position because they may need a lot of assistance during the search and recruitment process. In that case, you should ask them to select someone else on staff to perform the necessary administrative tasks in order to avoid any appearance of impropriety on your part.

Your conduct during the recruitment process

Regardless of whether you’ve decided to be a candidate for the permanent manager position, you may encounter several ethics-related situations covered under Tenets 3 and 12 of the ICMA code during the recruitment and selection process.

- Show professional respect for persons who formerly held the position as well as for others who apply for it. Honest differences of opinion are acceptable, but attacking a person’s motives or integrity in order to influence the selection process or to be appointed yourself is not.
- If you become aware of a possible ethics violation by an applicant or candidate, your best course of action is not to notify the elected officials, as they might be unduly influenced by such information, but instead to report it to the ICMA Committee on Professional Conduct. ICMA members, as a condition of membership, have agreed to submit to a peer review of their conduct under established enforcement procedures, and no member should circumvent that process.

- Needless to say, you should not disclose to others any confidential information you possess in your official capacity, nor should you use it to further your personal interests.

Interaction with candidates

In a competitive job market, good candidates should be researching your community during the recruitment process, and that research may include quizzing you. Again, you must not disclose confidential information. However, you may disclose any information that would be available to the public at large. Answer questions openly and honestly; share information freely with any candidate who asks. But refrain from sharing personal opinions about individual elected officials or any policy issues that may be under discussion but have not been publicly disclosed. Remember, whether or not you're a candidate for the position, one of the candidates going through this process may very well be your new boss.

Ethics in staff relationships

ICMA members bound by the *ICMA Code of Ethics* (Appendix A) have committed to handle all personnel matters on the basis of merit (Tenet 11). It is inevitable that conflicts will arise between you and your staff. It is imperative that you handle all such situations

fairly—not only for ethical reasons but also because at some point you may again be a member of the staff. It's never appropriate to use your heightened authority to retaliate against former peers for past actions. From an ethical perspective, you must keep your personal feelings out of decision making. As a practical matter, your success as interim manager depends on your ability to get the most out of each department head and staff member. The reputation you establish as interim manager will follow you throughout your tenure in the organization. Stay focused on the issues and be meticulous in using merit as the basis for any personnel actions.

In summary

Ultimately, you would be wise to consider any issues that arise or any decisions that you make during your tenure from the perspective of public scrutiny. What if I read this about another person in another place? Would I be okay with it? Whether the decision you face involves policy, personnel, or a project, your conduct will be noticed and your future reputation will be affected by it. Appearance of impropriety is as devastating to your reputation as actual impropriety. When in doubt, seek the advice of another trusted manager or an ethics advisor in your state or at ICMA.

OUT OF THE SPOTLIGHT: RESUMING YOUR FORMER POSITION

Once the appointment of the new manager is announced, it will likely be a number of weeks, or perhaps months, before the manager arrives. This period of transition can be difficult, particularly if you were a candidate for the position yourself; however, the business of local government must go on.

During this “gap” period, it is important that you meet with your management team to clearly outline and identify roles and expectations (both yours and those of the governing body) to ensure that the required business of the municipality is properly managed and implemented. This will include the prioritization of work based on two simple categories: (1) work/decisions that, owing to operational and/or legislative requirements, must be completed without delay; and (2) matters that can, or should, wait for the arrival of the new manager. To ensure that everyone is on the same page, it is also recommended that this prioritization exercise be fully explained to the governing body.

In your role as interim manager, your final and perhaps most important task is to prepare and execute a successful and smooth transition for the new manager upon his or her arrival. This section addresses your need to prepare yourself to return to your previous position within the organization.

If you were a candidate for the manager position

If you were not selected for the manager’s position, a level of disappointment at not being successful is expected. Your disappointment should not add to the workload of the incoming manager. The manner in which you manage your disappointment will not go unnoticed by the new manager, members of staff, the governing body, and the public, and it will speak volumes about your personal character and integrity. Do not waste this opportunity to showcase yourself as a professional and a team player who places the needs of the community ahead of personal goals. It is also important to remember that the new manager did not make the final hiring decision; the governing body did.

As interim manager, you will play a key role preparing the governing body, staff, and community stakeholders for the arrival of the new manager. That individual will need your assistance and advice to be

successful; the organization will look to you to provide reassurance and to help staff adjust; and the governing body and community stakeholders will count on your integrity, professionalism, and knowledge to keep projects on track and to maintain a high level of customer service during the transition of leadership.

Should you have questions regarding the outcome of the selection process, feel free to request a debriefing session with the mayor and/or members of the selection team both as a means of gathering information for personal and career growth and as a cathartic exercise to help you transition back to your former role. Speaking with a trusted colleague or keeping a personal journal may also help you privately work through your disappointment without negatively affecting your reputation or the organization.

If you were not a candidate for the manager position

If you were not a candidate for the manager’s position, you may still find it difficult to return to your previous position. The experience of serving in the role as manager, if even for a short time, will have had an impact on how you view the organization, its decision-making process, and your role within that process.

It is important that you be as thoughtful about your transition back to your former position as you are with your transition out of the manager’s role. To this end, it is recommended that you meet one-on-one with the individual who performed your duties during your time as interim manager to be briefed on projects and departmental priorities as well as to clearly outline roles and responsibilities during the transition and on a permanent basis going forward. It is also important to recognize the work done in your absence and to be ready to take advantage of the knowledge and experience gained by the members of the team during this period. In short, don’t expect everything to be the same as when you left, particularly if your absence was an extended one.

Assisting in the transition

As the interim manager, you are a critical piece in the orientation of the new manager. Before the new

manager arrives, it is recommended that you make a point of contacting him or her to introduce yourself, offer congratulations, and ask about the level and type of information he or she would like before arriving and about what meetings—if any—should be arranged on his or her behalf. It is important for your relationship with the new manager that you allow that individual to direct this stage of the transition.

Should the new manager be new to the community and the organization, it would help to prepare a list of key elected and community contacts, including personal background information and any specific projects or initiatives in which those stakeholders have a direct interest. In addition, the provision of an organizational chart identifying key departmental contacts will assist the new manager in reaching out to his or her new team members prior to and upon arrival. You can further help the new manager become acclimated to the organization by preparing high-level briefings related to ongoing or pending projects and “hot button” issues within the community.

Although the governing body was directly involved in selecting the new manager, its members will also be affected by the transition to new administrative leadership. Therefore, you should prepare a briefing for members of that body outlining the transition plan in place.

Once the new manager is on board, you need to step back and allow him or her to assume that role. To this end, one of the more difficult aspects of your transition will be to prepare yourself for not being involved in the level of meetings or elected official contact that you were used to while serving as interim manager. It is important that the new manager be afforded the time and ability to establish his or her own relationship with the governing body and members of the community.

Your job during this period is to help the new manager be successful. In fact, it would not be out of line for you to remind the department heads of this. They, as well as other staff members, will take their lead from you and the manner in which you interact with the

new manager. As you get to know the new manager on a more personal basis than the other department directors, you’ll start to see how his or her communication and management styles differ from yours and from those of the former manager. You can also help the departmental directors develop effective working relationships with the new manager; however, it is important that you are not seen as a filter between them.

You and the new manager will need to develop trust and an effective working relationship, but that relationship will need time to develop naturally. As with any working relationship, you will both need to adapt to each other. Remember that the new manager will also be adjusting and adapting to a new staff team, a new community, and a new organization and should be afforded the time to do this. Give yourself and the new manager time to work through this and also develop strong, open lines of communication to address any questions or concerns that arise during this period of transition.

Finally, it is essential that you demonstrate right away that you are a loyal, dedicated, and effective member of the team who will help your new colleague fulfill his or her mandate as the new city/town/county manager.

Moving forward

Your time as interim manager has provided you with valuable experience for the advancement of your career. Be sure to thank the governing body for the opportunity to serve as interim manager. Focus on the positive aspects of your time in that role; the experience you gained in leading the organization will help improve your management style and decision-making processes as you resume your previous role and will ultimately serve to improve effectiveness of the organization as a whole.

More than that, your experience may have proven to you that you are now ready to take on a manager’s role on a permanent basis. Should you decide to leave the organization to pursue that goal, ensure that you plan for a smooth transition and act in the best interests of the new manager, the community, and the organization as you take steps to advance your career.

APPENDIX A:

ICMA CODE OF ETHICS WITH GUIDELINES

The ICMA Code of Ethics was adopted by the ICMA membership in 1924, and most recently amended by the membership in June 2017. The Guidelines for the Code were adopted by the ICMA Executive Board in 1972, and most recently revised in June 2017.

The mission of ICMA is to create excellence in local governance by developing and fostering professional local government management worldwide. To further this mission, certain principles, as enforced by the Rules of Procedure, shall govern the conduct of every member of ICMA, who shall:

TENET 1. Be dedicated to the concepts of effective and democratic local government by responsible elected officials and believe that professional general management is essential to the achievement of this objective.

TENET 2. Affirm the dignity and worth of the services rendered by government and maintain a constructive, creative, and practical attitude toward local government affairs and a deep sense of social responsibility as a trusted public servant.

GUIDELINE

Advice to Officials of Other Local Governments. When members advise and respond to inquiries from elected or appointed officials of other local governments, they should inform the administrators of those communities.

TENET 3. Demonstrate by word and action the highest standards of ethical conduct and integrity in all public, professional, and personal relationships in order that the member may merit the trust and respect of the elected and appointed officials, employees, and the public.

GUIDELINES

Public Confidence. Members should conduct themselves so as to maintain public confidence in their position and profession, the integrity of their local government, and in their responsibility to uphold the public trust.

Influence. Members should conduct their professional and personal affairs in a manner that demonstrates that they cannot be improperly influenced in the performance of their official duties.

Appointment Commitment. Members who accept an appointment to a position should report to that position. This does not preclude the possibility of a

member considering several offers or seeking several positions at the same time. However, once a member has accepted a formal offer of employment, that commitment is considered binding unless the employer makes fundamental changes in the negotiated terms of employment.

Credentials. A member's resume for employment or application for ICMA's Voluntary Credentialing Program shall completely and accurately reflect the member's education, work experience, and personal history. Omissions and inaccuracies must be avoided.

Professional Respect. Members seeking a position should show professional respect for persons formerly holding the position, successors holding the position, or for others who might be applying for the same position. Professional respect does not preclude honest differences of opinion; it does preclude attacking a person's motives or integrity.

Reporting Ethics Violations. When becoming aware of a possible violation of the ICMA Code of Ethics, members are encouraged to report possible violations to ICMA. In reporting the possible violation, members may choose to go on record as the complainant or report the matter on a confidential basis.

Confidentiality. Members shall not discuss or divulge information with anyone about pending or completed ethics cases, except as specifically authorized by the Rules of Procedure for Enforcement of the Code of Ethics.

Seeking Employment. Members should not seek employment for a position that has an incumbent who has not announced his or her separation or been officially informed by the appointive entity that his or her services are to be terminated. Members should not initiate contact with representatives of the appointive entity. Members contacted by representatives of the appointive entity regarding prospective interest in the position should decline to have a conversation until the incumbent's separation from employment is publicly known.

Relationships in the Workplace. Members should not engage in an intimate or romantic relationship with any elected official or board appointee, employee they report to, one they appoint and/or supervise, either directly or indirectly, within the organization.

This guideline does not restrict personal friendships, professional mentoring, or social interactions with employees, elected officials and Board appointees.

TENET 4. Recognize that the chief function of local government at all times is to serve the best interests of all of the people.

GUIDELINE

Length of Service. A minimum of two years generally is considered necessary in order to render a professional service to the local government. A short tenure should be the exception rather than a recurring experience. However, under special circumstances, it may be in the best interests of the local government and the member to separate in a shorter time. Examples of such circumstances would include refusal of the appointing authority to honor commitments concerning conditions of employment, a vote of no confidence in the member, or severe personal problems. It is the responsibility of an applicant for a position to ascertain conditions of employment. Inadequately determining terms of employment prior to arrival does not justify premature termination.

TENET 5. Submit policy proposals to elected officials; provide them with facts and advice on matters of policy as a basis for making decisions and setting community goals; and uphold and implement local government policies adopted by elected officials.

GUIDELINE

Conflicting Roles. Members who serve multiple roles – working as both city attorney and city manager for the same community, for example – should avoid participating in matters that create the appearance of a conflict of interest. They should disclose the potential conflict to the governing body so that other opinions may be solicited.

TENET 6. Recognize that elected representatives of the people are entitled to the credit for the establishment of local government policies; responsibility for policy execution rests with the members.

TENET 7. Refrain from all political activities which undermine public confidence in professional administrators. Refrain from participation in the election of the members of the employing legislative body.

GUIDELINES

Elections of the Governing Body. Members should maintain a reputation for serving equally and impartially all members of the governing body of the local government they serve, regardless of party. To this

end, they should not participate in an election campaign on behalf of or in opposition to candidates for the governing body.

Elections of Elected Executives. Members shall not participate in the election campaign of any candidate for mayor or elected county executive.

Running for Office. Members shall not run for elected office or become involved in political activities related to running for elected office, or accept appointment to an elected office. They shall not seek political endorsements, financial contributions or engage in other campaign activities.

Elections. Members share with their fellow citizens the right and responsibility to vote. However, in order not to impair their effectiveness on behalf of the local governments they serve, they shall not participate in political activities to support the candidacy of individuals running for any city, county, special district, school, state or federal offices. Specifically, they shall not endorse candidates, make financial contributions, sign or circulate petitions, or participate in fund-raising activities for individuals seeking or holding elected office.

Elections relating to the Form of Government. Members may assist in preparing and presenting materials that explain the form of government to the public prior to a form of government election. If assistance is required by another community, members may respond.

Presentation of Issues. Members may assist their governing body in the presentation of issues involved in referenda such as bond issues, annexations, and other matters that affect the government entity's operations and/or fiscal capacity.

Personal Advocacy of Issues. Members share with their fellow citizens the right and responsibility to voice their opinion on public issues. Members may advocate for issues of personal interest only when doing so does not conflict with the performance of their official duties.

TENET 8. Make it a duty continually to improve the member's professional ability and to develop the competence of associates in the use of management techniques.

GUIDELINES

Self-Assessment. Each member should assess his or her professional skills and abilities on a periodic basis. Professional Development. Each member should commit at least 40 hours per year to professional development activities that are based on the practices identified by the members of ICMA.

TENET 9. Keep the community informed on local government affairs; encourage communication between the citizens and all local government officers; emphasize friendly and courteous service to the public; and seek to improve the quality and image of public service.

TENET 10. Resist any encroachment on professional responsibilities, believing the member should be free to carry out official policies without interference, and handle each problem without discrimination on the basis of principle and justice.

GUIDELINE

Information Sharing. The member should openly share information with the governing body while diligently carrying out the member's responsibilities as set forth in the charter or enabling legislation.

TENET 11. Handle all matters of personnel on the basis of merit so that fairness and impartiality govern a member's decisions, pertaining to appointments, pay adjustments, promotions, and discipline.

GUIDELINE

Equal Opportunity. All decisions pertaining to appointments, pay adjustments, promotions, and discipline should prohibit discrimination because of race, color, religion, sex, national origin, sexual orientation, political affiliation, disability, age, or marital status.

It should be the members' personal and professional responsibility to actively recruit and hire a diverse staff throughout their organizations.

TENET 12. Public office is a public trust. A member shall not leverage his or her position for personal gain or benefit.

GUIDELINES

Gifts. Members shall not directly or indirectly solicit, accept or receive any gift if it could reasonably be perceived or inferred that the gift was intended to influence them in the performance of their official duties; or if the gift was intended to serve as a reward for any official action on their part.

The term "Gift" includes but is not limited to services, travel, meals, gift cards, tickets, or other entertainment or hospitality. Gifts of money or loans from persons other than the local government jurisdiction pursuant to normal employment practices are not acceptable.

Members should not accept any gift that could undermine public confidence. De minimus gifts may be accepted in circumstances that support the execution of the member's official duties or serve a legitimate public

purpose. In those cases, the member should determine a modest maximum dollar value based on guidance from the governing body or any applicable state or local law. The guideline is not intended to apply to normal social practices, not associated with the member's official duties, where gifts are exchanged among friends, associates and relatives.

Investments in Conflict with Official Duties. Members should refrain from any investment activity which would compromise the impartial and objective performance of their duties. Members should not invest or hold any investment, directly or indirectly, in any financial business, commercial, or other private transaction that creates a conflict of interest, in fact or appearance, with their official duties.

In the case of real estate, the use of confidential information and knowledge to further a member's personal interest is not permitted. Purchases and sales which might be interpreted as speculation for quick profit should be avoided (see the guideline on "Confidential Information"). Because personal investments may appear to influence official actions and decisions, or create the appearance of impropriety, members should disclose or dispose of such investments prior to accepting a position in a local government. Should the conflict of interest arise during employment, the member should make full disclosure and/or recuse themselves prior to any official action by the governing body that may affect such investments.

This guideline is not intended to prohibit a member from having or acquiring an interest in, or deriving a benefit from any investment when the interest or benefit is due to ownership by the member or the member's family of a de minimus percentage of a corporation traded on a recognized stock exchange even though the corporation or its subsidiaries may do business with the local government.

Personal Relationships. In any instance where there is a conflict of interest, appearance of a conflict of interest, or personal financial gain of a member by virtue of a relationship with any individual, spouse/partner, group, organization, vendor or other entity, the member shall disclose the relationship to the organization. For example, if the member has a relative that works for a developer doing business with the local government, that fact should be disclosed.

Confidential Information. Members shall not disclose to others, or use to advance their personal interest,

intellectual property, confidential information, or information that is not yet public knowledge, that has been acquired by them in the course of their official duties.

Information that may be in the public domain or accessible by means of an open records request, is not confidential.

Private Employment. Members should not engage in, solicit, negotiate for, or promise to accept private employment, nor should they render services for private interests or conduct a private business when such employment, service, or business creates a conflict with or impairs the proper discharge of their official duties.

Teaching, lecturing, writing, or consulting are typical activities that may not involve conflict of interest, or impair the proper discharge of their official duties. Prior notification of the appointing authority is appropriate in all cases of outside employment.

Representation. Members should not represent any outside interest before any organization, whether public or private, except with the authorization of or at the direction of the appointing authority they serve.

Endorsements. Members should not endorse commercial products or services by agreeing to use their

photograph, endorsement, or quotation in paid or other commercial advertisements, marketing materials, social media, or other documents, whether the member is compensated or not for the member's support. Members may, however, provide verbal professional references as part of the due diligence phase of competitive process or in response to a direct inquiry.

Members may agree to endorse the following, provided they do not receive any compensation: (1) books or other publications; (2) professional development or educational services provided by nonprofit membership organizations or recognized educational institutions; (3) products and/or services in which the local government has a direct economic interest.

Members' observations, opinions, and analyses of commercial products used or tested by their local governments are appropriate and useful to the profession when included as part of professional articles and reports.

For more information, visit icma.org/ethics.

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APPENDIX B:

ADDITIONAL RESOURCES FOR THE INTERIM MANAGER

MUST-HAVES

ICMA Code of Ethics. The code that all ICMA members are committed to abide by, with guidelines for conduct.

Model Employment Agreement. A model developed by an ICMA task force to help managers negotiate an agreement. Although the model is more comprehensive than the typical interim manager agreement, it may suggest topics that you'd want to include in your agreement.

Making It Work e-Book: The Essentials of Council-Manager Relations

icma.org/councilrelations

The e-book has suggested techniques and strategies to maximize the likelihood of establishing and maintaining an effective working relationship with your governing board.

First-Time Administrator's Handbook

icma.org/newmanager

First published in 2000 and then revised in 2010, this handbook covers five key areas: first administrator in a community, first time as an administrator, promotion to administrator from within, new to local government, and resources. Tips and checklists are included.

COACHING AND PEER SUPPORT

ICMA Senior Advisor Program

icma.org/icma-senior-advisor-program

The ICMA Senior Advisor program (formerly Range Rider program) makes the experience, advice, and support of respected, retired managers of the profession available to members.

ICMA Coaching Program

icma.org/coaching

The ICMA Coaching Program delivers a suite of complimentary services to help you grow and enjoy your career. ICMA membership is not required to access any of these services.

ICMA Coaching Webinars

icma.org/agendas-and-archives

This series contains coaching webinars and podcasts from February 2008 to the present. Check out the following:

- * Developing Effective Relationships with Elected Officials (3/5/2015)
- * Navigating Staff-Board Relationships (2/27/2013)

Career Compass

icma.org/career-compass

Career Compass is a column from ICMA Coaching Program focused on career issues for local government professional staff and appears in ICMA's *Leadership Matters* newsletter. Check out "Career Compass No. 45: City Managers Need Coaches Too."

A SAMPLING OF AVAILABLE ARTICLES

"The Evolving Role of City Managers and Chief Administrative Officers"

www.munkschool.utoronto.ca/blog/the-evolving-role-of-city-managers-and-chief-administrative-officers/

This May 2017 paper from the University of Toronto Munk School of Global Affairs looks at how the relationship between elected officials and the public service has changed over time and what role the city manager or chief administrative officer plays in maintaining good council-staff relations. The paper presents practical principles for maintaining good council-staff relations, and warns of the clouds on the horizon that could threaten the city manager/chief administrative officer" model of local governance.

"Reading Governmental Financial Statements: A Primer"

plantemoran.com/perspectives/articles/2017/pages/reading-governmental-financial-statements-a-primer.aspx

This article from the Plante Moran website, January 26, 2017, explains that governmental financial statements are made up of several sections, each of which plays a role in disclosing the financial health of the entity. The primer also suggests some key places to quickly to gain an understanding.

“New Mayor, New Manager—Not Necessarily”

www.legacy.icma.org/en/icma/knowledge_network/blogs/blogpost/4481/New_Mayor_New_Manager_Not_Necessarily

This article comes from the March 3, 2016, ICMA blog, as told by Vola Therrell Lawson for *Democracy at the Doorstep*, Too. Ms. Lawson was appointed interim city manager of Alexandria, Virginia, in February 1985, and counseled at the time by the (previous) mayor: “If you’re going to be acting city manager, then ACT.” Ms. Lawson was unanimously selected to be city manager—only the third woman in America to be appointed city manager in cities with population over 100,000.

“So You’re the City Manager”

icma.org/public-management-pm-magazine

This is a short poem from the April 2017 issue of ICMA’s *PM* magazine, shared by Alexander Briseño, retired city manager of San Antonio, TX, about life as a local government manager.

“How Do You Stay Involved with and Helpful (but Not Annoying!) to Elected Officials?”

icma.org/en/press/pm_magazine/article/107945

In this article from the March 2017 *PM* magazine, several city administrators share their approach to staying involved with their council members and council candidates.

“Advice on My Career Path from Five Wise Men”

This article from the August 2005 issue of ICMA’s *PM* magazine provides helpful guidance if you are considering whether to seek or accept appointment as acting manager.

“I Could Work 24 Hours a Day!”

An article from the November 2004 issue of ICMA’s *PM* magazine, this piece offers advice that can help you balance work with the rest of your life when the acting role seems overwhelming.

“Surviving the Politics of Public Administration: A Toolkit for Assistants”

This article from the August 2005 issue of ICMA’s *PM* magazine can help assistants—especially those who have been appointed acting manager—navigate the sometimes blurry line between policy and administration.

“Your First Five Years in Local Government: Getting Started”

This checklist, originally prepared for a session at the ICMA conference, provides general strategies for getting started in local government.

Additional resources can be found at ICMA’s website www.icma.org/careers.

APPENDIX C:

SAMPLE INTERIM AGREEMENT

SAMPLE AGREEMENT FOR EMPLOYMENT AS INTERIM LOCALGOV MANAGER

THIS AGREEMENT for Employment as Interim LOCALGOV Manager (hereinafter “Agreement”) is made and entered into effective as of this the _____ by and between the [LOCAL GOVERNMENT], [STATE] (hereinafter “City / County”), by and through the City/County Council of LOCALGOV (hereinafter “Council”) and CANDIDATE, (hereinafter “Manager”), to establish and set forth the terms and conditions of the employment of the Manager as the Interim LOCALGOV Manager of the LOCALGOV. For the purposes of this contract the Manager is considered an employee and not an independent contractor.

WITNESSETH:

WHEREAS, the Council and Manager believe it is important to thoughtfully consider guidelines that will be consistent with both the letter and the spirit of State law, and to the extent applicable, the LOCALGOV’s charter and personnel policies, that will uphold the principle of “serving at the pleasure of the Council,” that will clearly define and incorporate the benefits to the community and organization, and that will address the protection of the Manager through provisions that are reasonable in nature and scope when compared to professional practices and local/regional market conditions and appropriately funded within the LOCALGOV’s budget;

WHEREAS, the LOCALGOV desires to employ the services of the Manager as the Interim LOCALGOV Manager of the LOCALGOV, pursuant to the terms, conditions and provisions of this Agreement;

WHEREAS, the Manager has agreed to accept employment as the Interim LOCALGOV Manager of the LOCALGOV, subject to and on the terms, conditions, and provisions agreed to and set forth in this Agreement;

NOW, THEREFORE, in consideration of the Manager accepting employment with the LOCALGOV, and other good and valuable consideration, including the mutual covenants herein contained, the LOCALGOV and the Manager hereby contract, covenant, and agree as follows:

Section 1. Duties.

The Council hereby employs the Manager to perform the duties and functions as specified in the LOCALGOV Charter and State law, this Agreement, and as the Council shall, from time to time, assign to the Manager consistent with the intent of this Agreement.

The Manager shall report for work, and the duties and employment of the Manager shall commence on the _____ (the “Commencement Date”) and conclude by _____.

When the LOCALGOV hires a new LOCALGOV Manager, the Interim Manager shall assist the newly hired LOCALGOV Manager in his/her transition for a reasonable amount of time as mutually agreed by both parties.

Section 2. Term.

The term of this Agreement shall continue until a permanent LOCALGOV Manager completes his/her transition into the position, but no later than _____ unless a later date is agreed to by the parties.

Section 3. Salary.

LOCALGOV agrees to pay the Manager fifty dollars (\$50.00) per hour payable at the same time as other employees of the LOCALGOV are paid. The LOCALGOV agrees to withhold the employee share of federal, state taxes etc. and to cover the Manager under its workers compensation policy. No contribution will be made to the Local Government Retirement during the term of this agreement.

Section 4. Automobile, Lodging, Meals, and Cell Phone.

The LOCALGOV agrees to reimburse the Manager for travel. This reimbursement may include reimbursement of mileage using the current IRS rate, use of a LOCALGOV vehicle or some combination which is agreeable to both parties. The LOCALGOV shall be responsible for paying for liability, property damage, and comprehensive insurance and for the purchase, operations (includes fuel), maintenance and repair of the LOCALGOV Vehicle.

The LOCALGOV agrees to reimburse the Manager for reasonable cost of lodging, meal expenses, and incidentals incurred by the Manager in the performance of his duties for the LOCALGOV.

The LOCALGOV agrees to provide the Manager the use of a cell phone for LOCALGOV business.

Section 5. Benefits.

It is mutually agreed the Manager is not entitled to any LOCALGOV employee benefits except those mentioned herein.

- The LOCALGOV will allow Manager to participate in the LOCALGOV's 457, 401K or similar plan.

Section 6. Indemnification.

To the fullest extent permitted by law except as specifically limited by the LOCALGOV Ordinances, the LOCALGOV shall defend, save harmless and indemnify Manager against any tort, professional liability claim or demand or other legal action, whether groundless or otherwise, arising out of an alleged act or omission occurring in the performance of Manager's duties, and shall obtain and keep in full force and effect liability insurance, or risk pool coverage, including errors and omissions coverage on a "per occurrence" basis, in sufficient amounts to assure amounts to assure accomplishment of such this hold harmless and indemnification clause; in this regard, the LOCALGOV and/or its liability insurer(s) shall have the right, in its or their discretion, to compromise and settle any such claim or suit on behalf of the LOCALGOV and the Manager

without the consent of Manager; the LOCALGOV and/or its insurer(s) shall pay the amount of any settlement or judgment rendered by reason of any such suit or claim; provided that this section shall not be construed as creating any right, cause of action, or claim of waiver or estoppel for the benefit of or on behalf of any third party, nor shall it be construed as a waiver or modification of the defense of governmental immunity or any other legal defense available to either LOCALGOV or the Manager as to any claim brought by or on behalf of any third party; provided further that nothing herein shall be construed to require the LOCALGOV to indemnify or hold harmless the Manager from and with respect to any claim or liability for which the conduct of the Manager is found by the courts to have been grossly negligent or intentionally willful conduct. The provisions of this indemnification section shall extend beyond and survive the termination of employment and the expiration of this Agreement.

Section 7. Hours of Work and Time Off.

It is recognized that the Manager will work a flexible schedule with a minimum of twenty-four hours and a maximum of thirty two hours each week. The Manager may work in half or whole day increments or any portion thereof. The Manager may perform work off site as appropriate.

The Manager agrees to be available by telephone for consultation and advice on days that he is not physically working in the LOCALGOV. Manager also agrees to respond to the LOCALGOV for emergency situations.

Section 8. Separation and Severance Considerations.

The contract shall conclude on the earlier of either of the following:

- 1) Successful recruitment and transition of a new permanent LOCALGOV manager;
- 2) _____, unless mutually agreed contract extension or termination;

In the event the LOCALGOV terminates this Agreement prior to the completion of the hiring and transition process for a new permanent LOCALGOV Manager the LOCALGOV shall pay the Manager a severance payment based on twenty four hours per week from the date of termination through _____.

At the conclusion of the contract, the LOCALGOV agrees to provide to the Manager, without cost, an electronic copy of his work documents, such as but not limited to emails, correspondence, memoranda and other documents prepared or received by the Manager while employed by the LOCALGOV pursuant to this Agreement.

Section 9. General Provisions.

A. Governing Law. This Agreement shall be construed in accordance with, and governed by, the laws of the State of STATE. Venue shall lie exclusively in LOCALGOV, STATE.

B. Entire Agreement. This Agreement incorporates all the agreements, covenants and understandings between the LOCALGOV and the Manager concerning the subject matter hereof, and all such covenants, agreements and understandings have been merged into this written

Agreement No other prior agreements or understandings, verbal or otherwise, of the parties or their agents shall be valid or enforceable unless embodied in this Agreement.

C. Amendment. This Agreement shall not be modified or amended except by a vote of the LOCALGOV Council and upon approval of the Council, a written instrument executed by the Manager and the duly authorized representative of the Council.

D. Resignation/Termination. This Agreement shall be null and void upon receipt of a written notice from either the LOCALGOV or Manager requesting termination of the Agreement.

E. Other Employment – The LOCALGOV understands that the Interim Manager is seeking other full-time employment in and outside STATE. In the event such employment is secured, the Interim Manager will notify the Council and provide a three-week notice unless otherwise agreed.

IN WITNESS WHEREOF, the LOCALGOV and the Manager have executed this Agreement effective as of the date first written above.

LOCALGOV

By: _____

LOCALGOV Signatory

ATTEST:

LOCALGOV Clerk

(LOCALGOV Seal)

AGREED AND ACCEPTED this the _____ day of _____, YEAR.

CANDIDATE, Interim LOCALGOV Manager

This instrument has been pre-audited in the manner provided in the Local Government Budget and Fiscal Control Act.

Finance Director

APPENDIX D: ACKNOWLEDGMENTS

The 2017 Task Force would like to gratefully acknowledge the ICMA members on the 2005 Task Force on Serving as an Acting Manager:

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*The mission of ICMA is to advance professional
local government through leadership, management,
innovation, and ethics.*

ICMA

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