

#### **INSIDE**

- 2 ETHICS Q & A
- **18** DEALING WITH DISTRESSED PEOPLE
- **30** SHARING SUPPER
- **36 MISTAKES HAPPEN**

# THE PROMISING POTENTIAL OF WORKSITE HEALTH CLINICS

A fresh look at a cost-effective model of care



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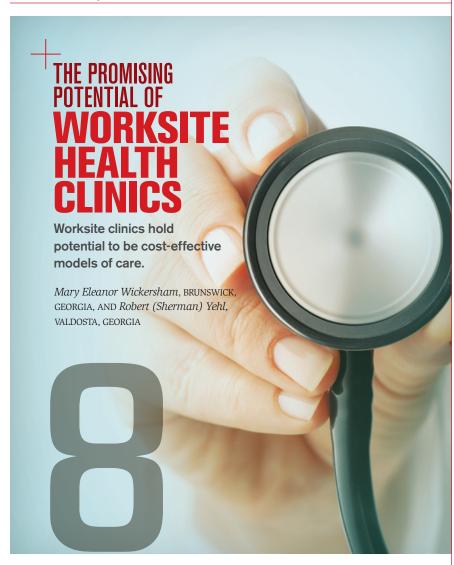
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#### contents July 2013 | Vol. 95 No.6

#### cover story



#### features

#### 14 INTEGRATED FUND MANAGEMENT

Pick a strategic approach to managing financial resources. D. Michael Segrest, SNOWMASS VILLAGE, COLORADO

#### 18 DEALING WITH **DISTRESSED PEOPLE**

Nine ways to make it easier to serve your community's residents. Joseph and JoAnn Callaway, PHOENIX, ARIZONA



#### departments

- **Ethics Matter!** Ethics Q & A
- **President's Focus** Lessons, Tips, and Random Thoughts
- @icma.org
- On Point

When a Once-Trusted Employee Is Found to Be Untrustworthy, What Would You Do?

- 17 Calendar of Events
- 22 Commentary

Reflections of an Early Career Professional

- 24 Management Minute
  - Getting the Big IT Picture
  - By the Numbers
  - Sharing Supper
- 27 Council Relations

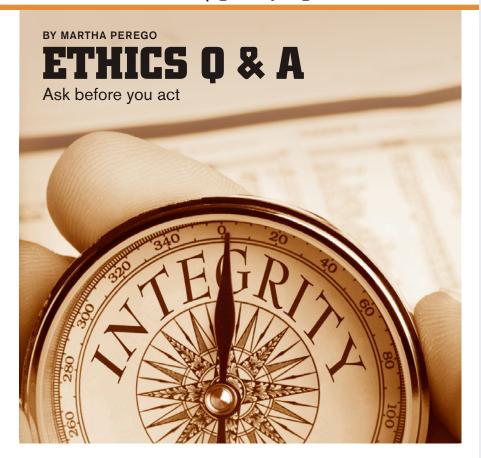
One Bad Apple

- 28 Professional Services Directory
- 32 Short Story

Mistakes Happen



#### ethics matter! | good judgment



ood decisions result from correct and complete information, an understanding of the environment, a clear picture of the desired end, and good judgment. Part of having good judgment is the willingness to test your proposed action plan with others.

When it comes to ethical decision making, testing your solutions with an objective source can detect any bias that may prevent you from selecting the most appropriate course. Many members seek advice from ICMA's ethics adviser, as the following three exchanges demonstrate.

Q: After many years in the profession, I am on the radar of two organizations interested in diversifying the membership of their boards. Both are national organizations with no footprint in the community. Both organizations, one a nonprofit and the other a for-profit, pay their directors. What ethical concerns should I consider if I decide to accept an offer?

A: The good news is that since these two entities have no direct connection to

the community, you would be avoiding what is typically the most significant ethical concern a manager faces when he or she volunteers to serve on a board: dealing with the conflicts of interest in fact or appearance that occur when the volunteer organization has some official interaction with the municipality.

What you do on your personal time matters though. After all, your reputation, and by association, that of your employer, are in play here. As you vet any offers, consider these questions: Do you support the organization's mission? Does it operate in an ethical manner and how do you know? Does it share your values? Would you be proud to be part of the organization's board, even if it runs into trouble?

Finally, as with any outside employment, notify your employer; comply with any internal regulations on outside employment; and be sure that all extracurricular activity occurs on your own time.

Q: I am a town/gown city manager. Our youngest child has been accepted by the local university. It makes financial sense



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in this housing market to purchase a home for his use for the next four years. To make it financially feasible, he would need to have one or two roommates.

We have no interest in being landlords in the long run so would sell the house when he graduates. If we proceed with this plan, would I be violating the prohibition on real estate speculation outlined in the guidelines for Tenet 12? Does renting rooms to other students constitute a business investment that should be avoided?

A: With regard to making real estate purchases in the community where you work, both intent and purpose are important. The guideline's underlying principle is that members should not seek out real estate investments in the community where they work for the purpose of making money. And certainly not use confidential information for personal benefit.

Buying rental property because you are looking for business income is different than buying rental property to house your family. The first activity is entirely optional and should be avoided. The second is a legitimate necessity, and for that reason, is okay. Any increase in the value that occurs over four years is appreciation rather than profit from speculation.

It's important to disclose why the purchase is being made and to manage any potential conflicts that may arise in your new role as a landlord dealing with city services. Convincing your son and his housemates to be good (and quiet) neighbors will go a long way in making this effort work.

Q: The county hired a management consultant to work under contract with our leadership team to provide executive coaching. This consultant also wrote a book on leadership that is centered on his inspiring personal story. In addition to the consulting work, he conducts book talks around the country for a variety of organizations and groups. He typically sells some books at each of the talks.

Because the content is so relevant to the work that we do, I hosted a book talk for my staff. Since this was training, we paid a small fee to the consultant to conduct the talk.

The management consultant has now asked me to sign a letter discussing our experience with the book talk and recommending the presentation to other local government managers. The letter would direct them to the consultant's website, and it would also include my phone number and contact information. Would this letter of recommendation violate the ICMA Code of Ethics?

A: As with most ethical scenarios, this one is not exactly black and white. Under the endorsement guideline for Tenet 12, you can endorse a book by encouraging colleagues to read it or even write a note for the book jacket.

But a book talk facilitated by the author for a fee is really a professional development event. Members can endorse a professional development service but only those provided by nonprofit membership organizations or recognized educational institutions. They can't endorse professional development activities provided by consultants because they are considered a commercial service.

The best course here is for you, as manager, to decline the request to write the letter of recommendation for the book-talk presentation. To do so would be to get too close to the line on endorsing a service. Because the book's message resonated with staff, consider writing an article for a professional publication like this magazine. That is an entirely acceptable way to share the inspiring story.

Facing an ethical dilemma? Remember to ask before you act. **PM** 



**MARTHA PEREGO** Ethics Director, ICMA Washington, D.C. mperego@icma.org

BY BONNIE SVRCEK, ICMA-CM

#### LESSONS, TIPS, AND RANDOM THOUGHTS

Our management environment is full of insights

🖥 or those of you who know me, I am a Type A task-driven person who usually has a plan, and my plans are usually driven by management and leadership lessons that I have learned from others. So, it should be no surprise that in this article I share with you a list of my top five leadership lessons and tips for managers and assistants, along with my top five management lessons and tips for managers and assistants.

I know I have mentioned this in previous articles but my definition of leadership and management bears repeating before I share my lists: Exercising leadership is transformational; exercising management is transactional. I truly believe the difference between the two is just that simple.

#### **Leadership Lessons and Tips**

- 1. Always say "yes with pleasure" and "no with compassion." Ron Secrist, who is the first town manager with whom I worked, shared these words of wisdom when he offered me my first job as assistant town manager in Blacksburg, Virginia.
- 2. Model the behavior you expect in others.
- 3. Humility goes a long way in any circumstance.
- 4. Challenge the status quo (and I advise you to use extreme caution in saying, "We do it this way because we have always done it this way"). Kim Payne, the city manager with whom I now have the privilege of working in Lynchburg, Virginia, offers a not-sonice look to anyone who responds with, "That's the way we have always done it."
- **5.** Balance the view from the balcony with being on the dance floor.

#### **Management Lessons and Tips**

- 1. Always approach a problem with, "Search first how we can rather than how we can't" (as appropriate, of course!). Chuck Church, the manager who hired me in Lynchburg, Virginia (and hopefully is smiling down on me now), taught me this as I was challenged with balancing the budget during a particularly difficult fiscal year.
- 2. Hire people who complement your knowledge, skills, and abilities.
- 3. Always be on time for meetings and honor deadlines.
- 4. Give credit where credit is due.
- **5.** Be a giraffe: Stick your neck out and take on new projects and responsibilities—you never know where such opportunities may lead.

And, appropriate to both exercising management and leadership, timing is everything! Sometimes my greatest opportunities have come when I have been in the right place at the right time. And sometimes my greatest lessons have come when I have been the most disappointed.

Finally, one of my most valuable lessons and core beliefs is knowing that everything happens for a reason.

#### It's All Relative

Here are four seemingly random ideas that ICMA members might want to remember:

Now, right now, go to the ICMA website at icma.org/en/icma/priorities/ just\_one\_thing and enter what you are doing this year to be more actively engaged in ICMA. The more you put into ICMA as a functioning, engaged member, the greater your return on investment will be in the association.

Thanks to everyone who attended this year's ICMA regional summits.

The summits' focus on Jim Collins' question of what causes greatness and his book Great by Choice, stimulated provocative conversation, followed by lively discussion on our commitment to political neutrality outlined in Tenet 7 of the ICMA Code of Ethics: "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."

Meeting and reconnecting with ICMA members around the country has been a highlight for me as I attended each of the regional summits. A special thanks to all members who participated in the firstever regional nominating committees for selection of candidates for the 2013-2014 ICMA Executive Board.

The ICMA 100th Anniversary Task Force is working hard to create a memorable celebration of our professional association in 2014, both glancing back and focusing forward. It is worth your time to visit the 100th anniversary website at icma.org/en/icma/about/ anniversary/home.

Many thanks to the 15 members of the ICMA Credentialing Advisory Board who take the time to read annual reports and provide feedback to each of us in the Voluntary Credentialing Program. I just received the results of my professional development assessment (the assessment that credentialed managers need to complete every five years).

As I reviewed my assessment, I was reminded of the tremendous asset that the credentialing program is and how it truly makes us more accountable for our own professional development.

As always, I thank you for giving the best that our profession has to give in making your community a better place to live, work, play, and visit.



**BONNIE SVRCEK.** ICMA-CM **ICMA President** Deputy City Manager Lynchburg, Virginia bonnie.svrcek@lynchburgva.gov

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See the fantastic list of contributors published in PM who donated to the ICMA Fund for Professional Management and ICMA's Life, Well Run Campaign during 2012.

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Is preventive maintenance a priority in your government so building and equipment failures aren't a concern?

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#### WHEN A ONCE-TRUSTED EMPLOYEE IS FOUND TO **BE UNTRUSTWORTHY, WHAT WOULD YOU DO?**



**PENNY HILL** Village Manager Kalkaska, Michigan mgr@kalkaskavillage.com

If an employee has broken the law, and a local government is the victim (e.g., embezzlement, stealing, violent behavior, vandalism), ensure that the community's attorney and insurance company are involved right away. This type of activity cannot be allowed in any organization.

Even such minor transgressions as traffic violations should be monitored, since repeated offenses may suggest that an employee's ability to perform his or her job functions is at risk.

In all of these situations, communication is key, especially if the employee was once well trusted. There may be an underlying cause for the shift in character.

Let employees know that you will help if they will allow it. Be sure that they understand the ramifications of their actions (or inactions). Follow-up and see how they are doing. Seek professional help if the situation continues or deteriorates. If discipline is needed, follow your organization's disciplinary process.



**BRYAN COSGROVE** City Manager Wilsonville, Oregon cosgrove@ci.wilsonville.or.us

It's important to create an environment where trusting employees is the norm and not the exception. Having said that, there are always going to be instances when an individual employee betrays the trust of his or her manager.

The worst thing any manager can do is to ignore violations of trust as that erodes organizational confidence and sets a new norm for acceptable behavior. In determining the appropriate course of action when a breach of trust occurs, much depends on the severity of the breach.

There are some violations of trust that require immediate suspension or termination. For minor breaches of trust, managers need to analyze the problem, document the occurrence, provide training to correct the behavior, and follow-up with counseling to make sure the employee understands your expectations with regard to workplace behavior.



TONYA GALBRAITH, ICMA-CM Town Manager McCordsville, Indiana tgalbraith@mccordsville.org

As we all know, technology is a great thing—except when it isn't. We all hear the horror stories and wonder how it might be handled if the "what if" happened to you. What if a trusted department head inadvertently forwarded an inappropriate e-mail to the secretary of the director of an important state agency, one who actually provides grant resources to local communities?

And, what if you received the call regarding the forwarded e-mail on the Monday morning right after the Christmas holidays because the secretary was deeply offended?

First, you scream silently and then you do what you never thought you would have to do-you verbally reprimand your trusted department head, place a memo in his personnel file, request that an apology be made to the offended secretary, and go from there to rebuild your relationship.

I just hope this never happens to me.



**SCOTT MORELLI** City Manager Gardiner, Maine smorelli@gardinermaine.com

I envision two types of employee untrustworthiness: 1) deliberate, such as intentionally misleading you or doing an end run, and 2) unintentional, where it's not malfeasance but rather that the individual is in over his or her head with personal or job-related responsibilities.

For the latter, I've taken away an employee's peripheral responsibilities and replaced them with duties that I felt were more aligned with his or her skills. If a primary responsibility was in question, however, immediate retraining or potential termination would be options. Imagine keeping a chief financial officer whose numbers never add up.

If the former, I'd immediately meet with the employee to find out why the person was being deceptive. Unfortunately, once a person has betrayed an organization, he or she will likely do it again to you, to fellow employees, and to the public, so termination may be the only answer. PM



# THE PROMISING **By Mary Eleanor Wickersham** and Robert (Sherman) Yehl

A fresh look at a cost-effective model of care

orksite health clinics are an old concept getting a fresh look because of their promising potential to manage health care costs. A 2011 ICMA study reported that of governments serving populations of more than 10,000, 9 percent already provide worksite clinics, and 12 percent are considering adding clinic services.

There is a long-standing public perception that government employees receive "Cadillac" health benefits. While varied benefits packages are difficult to benchmark, a study prepared for the Center for State and Local Leadership reports that public insurance benefits are richer and employees pay a smaller percentage of the costs than in the private sector. While many private sector employers continue to shift costs to employees, with higher co-pays and deductibles, public managers have been less likely to do so.

Even in the best of economic times, these high-cost, low-contribution plans may be difficult to justify and may be even more questionable in our era of intense public scrutiny. As a result, local government leaders are proactively seeking solutions that will ensure their ability to afford quality health coverage at a time of diminishing revenues.

While a top priority for governmentoperated worksite clinics should be employer savings, additional indirect savings can occur by improving the health of employees, reducing lost time and absenteeism, and reducing costs to employees. Despite their brief history,

#### Types of Services to Be Identified On the RFP

- + Primary care
- + Dispensary
- + Preventive services
- + Acute episodic service
- + Laboratory services
- + X-ray, ultrasound
- + Infusion pharmacy
- + Hospital admissions
- + Disease and case management programs
- + Health education/promotions
- + Health risk assessments
- + Biometrics
- + Health coaching
- + Referrals
- + Smoking cessation
- + Obesity/weight management
- + Type II diabetes management
- + Domestic violence screening
- + Low back pain management
- + Disease prevention
- + Depression
- + Physical therapy
- + Heart disease prevention
- + Drug testing (7-panel)
- + Blood work
- + Health risk assessments

there is growing evidence that the control mechanisms worksite clinics offer can maintain or even reduce public expenditures for employee health care.<sup>2</sup>

These results are achieved not by cutting benefits but by moving away from the traditional fee-for-service model of care to embrace the "medical home" or "patient-centered medical home" (PCMH) model. This model places the focus on primary care and a holistic integration of wellness and disease management while developing an on-going relationship with a medical provider. While most governments are intent on slowing the trend line on rising health care costs, clinics provide the potential for long-term savings realized through improved health care due to better access and preventive care within this medical home.

#### **Factors to Consider**

**Operations planning.** For governments considering a worksite health clinic, planning for operations is time well spent. Keeping both short-term and long-term goals in mind, consider the availability of a facility adjacent or near your government center, the appropriate scope of services for your population of employees, and benefit design to encourage employee/dependent use.

#### Minimum potential participants.

One of the first questions to consider is: Is your organization large enough to support a clinic? From available data and a review of the size of entities that have established clinics, a minimum employee population of 500 is suggested, although some clinics operate efficiently with as few as 300 employees.

If a government entity is not large enough to support its own clinic, the manager may look to other public agencies to form a consortium for mutual benefit. In some communities, school boards and county and city governments have cooperated to open clinics with expanded hours and services.

**Location.** Many communities have identified excess property or vacant

storefronts that can be converted for a reasonable cost for clinic space. Facility design should ensure easy access, adequate space to include a reception/waiting area, pharmacy, exam rooms, lab and other equipment, and adequate parking. In some cases, clinic providers may set up the clinic, which may increase costs overall but reduce initial capital expenses.

Range of services. Decisions must be made on the range of services, clinic availability to dependents and retirees, number of hours of operation, and whether a full-time physician is required. Some states may allow a part-time physician to manage a full-time physician's assistant or nurse practitioner. Employee needs should dictate the need for a 24/7 nurse assistance line, wait times, and whether the clinic will accept walk-ins or require appointments.

In addition to offering primary care services, some other popular clinic features include lab and X-ray services, preventive services and wellness classes (e.g., smoking cessation, weight management, diabetes management), flu shots, health education, and pharmacy services. Establishing a dispensary for pharmaceuticals as an integral part of the clinic can offer substantial cost savings to both employer and employees.

An on-site dispensary means that the patient can leave with a filled prescription, which improves medication compliance. Most worksite clinics typically stock only the 100 or so most common generic drugs, which are in most cases available at a low cost to employers and at little or no cost to employees, thereby saving them money as well.

Issuing a request for proposal. Once the planning is complete, an RFP should be prepared. Local governments may choose from several national providers of health clinics or may opt to select a local health care provider to offer clinic services. Regardless of the management, a thorough RFP must clearly identify the method of reimbursement (cost-plus or

contract), scope of services, ancillary services, hours of operation, level of staffing, after-hours expectations (if any), liability issues, and reporting metrics expected.

Ensuring that your clinic provider will supply an electronic medical record, predictive analytics, and population health data are critical to ensure a means for performance measurement. Expect a real-time dashboard that will help your organization monitor use of the clinic, identify high cost areas, and ensure vendor accountability.

Avoid any "et ceteras" in the contract by being specific about expectations. It is not uncommon for clinic vendors to expect a three- to five-year contract, and local government managers will want to avoid any misunderstanding about the services expected.

Be clear that worksite clinics represent a major change in service delivery. On the positive side, the local government can improve care through

# WORKSITE CLINICS CAN DRAMATICALLY IMPROVE ACCESS TO PRIMARY CARE WITHIN THE MEDICAL HOME, WHICH HAS BEEN DEMONSTRATED TO IMPROVE QUALITY OF CARE AND REDUCE COSTS FOR EMPLOYEES.

the establishment of a medical home. On the downside, local providers or institutions may view the clinic as competition and push back on implementation by an outside provider. Employees may also perceive this change as a cut in benefits.

**Employee engagement.** By involving employees up-front in the design of the clinic through surveys, focus groups, and employee meetings, the government will more likely avoid the angst such

change creates. Once a decision is made to establish a clinic, there cannot be too much education on its use and benefits to employees.

Worksite clinics can dramatically improve access to primary care within the medical home, which has been demonstrated to improve quality of care and reduce costs for employees.

**Return on investment metrics.** Once established, someone in your organization

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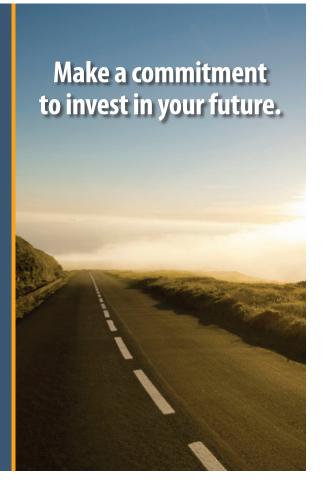
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should be assigned to review the reporting data on a regular basis. Information that will be helpful to you includes:

- **Population health data.** While the organization must not violate HIPAA laws, a health analyst or benefits consultant can collect population health data for trending. This may alert the organization to areas where additional employee education is needed, changes are necessary in the health plan to foster healthy behaviors, or added services like weight management or diabetes counseling could improve health outcomes.
- **Specialty utilization.** Health plans can require a referral to a specialist, which can help control costs. Specialists often charge three or more times what a primary care doctor charges. Referrals also help the primary care provider stay engaged with care and can help reduce redundant tests and ensure follow-up.
- Workers' compensation injuries. Clinics may be able to provide early identification of similar injuries that could reflect the need to change processes or equipment.
- Sick days. Quick access to an on-site provider may reduce absenteeism, including absences for time-consuming doctor visits. Most clinics offer same-day appointments. Tracking and trending sick days provide indication of return on investment.
- Hospital days, emergency room visits, home health days. These are high-cost services that might reflect the need for counseling, case management, or a health problem that needs attention.
- Comparison of community costs and clinic costs. The best way to calculate return on investment is to compare costs of community services and the same services at the clinic. By building in cost-collection measures as part of planning, managers will be able to pinpoint savings that will be important for decision making and reporting.
- Employee satisfaction. Listen to your employees in order to make necessary

IF A GOVERNMENT ENTITY IS NOT LARGE ENOUGH TO SUPPORT ITS OWN CLINIC, THE MANAGER MAY LOOK TO OTHER PUBLIC AGENCIES TO FORM A CONSORTIUM FOR MUTUAL BENEFIT.

#### **What Services Should Be** Provided?

- + Primary (basic medical) care
- + Disease management
- + Health promotion and wellness
- + Pharmacy or mini-dispensary
- + Lab services
- + X-ray
- + Annual flu vaccinations
- + Workers' compensation care

clinic changes to ensure use. The larger the percentage of employees using the clinic, the lower the costs of processing outside claims.

#### **Information Sources**

Unfortunately, for local governments interested in clinic operations, there is neither a national database of municipal health clinics nor a one-size-fits-all solution. Managers may want to speak with their current health care providers who generally are a wealth of knowledge and might provide specific insights and knowledge on worksite clinics.

You will want to tread carefully when seeking opinions from potential vendors who may exaggerate the positive aspects of their clinic models when attempting to "make the sale." In making an evaluation on return on investment, be aware that there is no standardized model in use across the states. Your colleagues with the experience of setting up a clinic

remain a good resource for advice.

Most will likely agree: Worksite clinics can create an environment in which there is patient-provider trust and accountability, while achieving employer and employee cost-savings and the long-term benefits of improved employee health.

Finally, there is a national association dedicated to worksite health centers and clinics at worksitehealth.org. This resource is a good place to start for information, education, and networking if your organization is thinking about integrating an on-site clinic with your current health care strategy.

#### **ENDNOTES**

- 1 See Josh Barro (2012). "Cadillac coverage: the high cost of public employee health benefits." Civic Report No. 65, Center for State and Local Leadership. Manhattan Institute. Retrieved from manhattan-instittue.org/csll.
- 2 See David H. Chenoweth and Judy Garrett (2006). "Cost-effectiveness analysis of a worksite clinic." AAOHN Journal 54(2): 84-89; David Levine (2012). "On-Site Health Centers Save Local Governments Money." Governing: June; Betty Liddick (2005). "Sick over health care costs, companies get some relief with on-site medical centers." Workforce Management 84(5): 82; Don Mooradian (2008). "Jobsite health clinics open doors to savings." HealthLeaders InterStudy - Tennessee Health Plan Analysis 20(4): 1-4; Anne V. Moore (2011). "The doctor is in - at the workplace." Benefits Magazine (December): 14-19; and Lori T. Oliphant and Cheryl C. Murray (2012). "Fit for an on-site clinic." HR Magazine 57:1, 61, 63, 65.



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#### **TAKEAWAYS**

- > Applying integrated fund management in a comprehensive approach can be helpful in meeting the long-term financial needs of a community.
- > Integrated fund management offers the ability to balance budgets without increasing taxes or fees.
- Done properly, this fund management should be well received by elected officials and residents.

Integrated

A strategic approach to managing financial resources

By D. Michael Segrest

ooking at the title of this article, your first question might be: What is integrated fund management? The definition I use for the term is a strategic approach to managing the various resources of a local government agency to align expenditures and needs with the most restrictive fund for which they qualify. The ultimate objective is to free up the general fund and provide maximum flexibility in financing current budget requirements, as well as unfunded needs and structural deficits.

Based on a limited survey of local government agencies and my more than 40 years of local government experience, I estimate that the collective fund balances of all local government agencies in the United States is in the billions of dollars-money that is right now earning a return of less than 1 percent when operational and capital costs escalations are between 2 percent and 3 percent. >>

#### **Order of Business**

In order to fully understand how to implement integrated fund management, managers can recall how they got to the implementation point and how they are perpetuating the continued accumulation of significant amounts of cash when they are laying off employees and cutting services. They probably got to this phase because of the distrust by the electorate to use tax money wisely.

During my local government years, I have seen and been a part of presenting tax issues to the voters under the assumption that the only way to secure their approval was to have a specific list of services that residents like. As a result, the general fund, which gives us the most flexibility, has shrunk as a component of government financing and the complexity of government finance has grown exponentially.

A manager ought to get a copy of his or her local government's comprehensive annual financial report and go to the section with a title similar to "Statement of Revenues, Expenditures, and Changes in Fund Balances." Then look at the bottom line and the total fund balance of all funds. Some managers may be shocked at this number or be reminded of its magnitude.

If you ask the finance director about it, he or she will likely tell you most of those funds are restricted and can't be used to help out with current needs. I would like to tell you how you can use some of those funds to avoid cutbacks, layoffs, and cuts in service levels, and to reduce structural deficits in your current budget. I have a great respect for finance directors, but it is not their job to challenge the underlying structure of the group of funds that they monitor. It is your job as a manager to do this.

#### **Review and Analyze**

Typically, you can get a quick overview of fund restrictions by going to the annual budget. There should be a brief description of the allowed uses for each fund. This will give you a quick overview and a hint at which ones may offer

some opportunities to provide relief to other funds, especially the general fund.

Next, you are going to need to complete a more in-depth analysis of the restrictions that apply to all funds as well as all documents and historical precedents applicable to how those funds have been used. You will also need to look at how those historical uses could be expanded and still comply with restrictions.

Many funds have been created by an act of the governing body and can be amended without a vote of the electorate. Others may require the approval of the electorate.

The reason you need to complete the analysis of all fund restrictions is that it gives you insights into what elements of your current budget and what unfunded needs might qualify for each fund.

Restrictions for a park improvement fund, for example, may be broad enough

fund balances need to be reserved for these future expenditures. In the case of capital funds, you will typically find fund balances that seem to stay fairly large due to the lag between initial funding of a project and the time it takes to implement them, which can span multiple years.

There may be an opportunity to use some of these funds for quick turnaround projects to keep key staff employed if the funding source is expected to have future revenue to pay for long-term projects when they are ready to proceed. You may also find capital projects with funding that is either more than needed or funding for projects that are no longer viable, but have simply stayed on the books.

When you see a fund balance that has been fairly constant for several years, this is a target for potential one-time funding of one-time needs. This fund

As you examine the various funds, you will be looking for these things: fund balances that currently exist and trends in these fund balances. And, are these fund balances increasing, decreasing, or staying constant over time?

to include such beautification projects as landscaping a median, buying a piece of art for city hall, or creating a small park around a new fire station that could pay for the necessary landscaping for this project. You could even get some positive community benefits from this approach as you expand the use of a site to qualify it for the park improvement fund.

#### What to Look For

As you examine the various funds, you will be looking for these things: fund balances that currently exist and trends in these fund balances. And, are these fund balances increasing, decreasing, or staying constant over time?

You will also need to examine future anticipated liabilities or commitments of the various funds to determine if should not be considered for funding ongoing costs, but it could be used to temporarily assign valuable staff to implement eligible projects and avoid losing this talent in the organization.

A fund balance that has been declining for a number of years is a red flag for needing some additional resources, which might be accomplished by implementing integrated fund management. A fund balance that has been increasing for a number of years is a candidate to look at for closing the structural deficits on other funds that have been declining. Again, an opportunity to keep valuable staff on board and to get short-term, worthwhile projects implemented.

A sub-element of IFM is integrated risk management (IRM). IRM uses a similar technique to examine the amount I have a great respect for finance directors, but it is not their job to challenge the underlying structure of the group of funds that they monitor. It is your job as a manager to do this.

of reserve that is needed to adequately cover the combined risk of catastrophic events for such areas as physical disasters (fire, flood, and others), equipment failure, health coverage costs, workers compensation, and financial disasters.

Even if you just use this approach for your equipment replacement funding and convert to a cash-flow approach rather than the typical depreciation-based model, you can free up substantial one-time funding. This is a topic that requires more in-depth discussion than is possible in this article, but it should be a part of an overall financial strategy.

I used this approach to turn around organizations from deficit spending to positive cash flow in Snowmass Village, Colorado, and Moraga, California. In Snowmass Village, we were able to shift some transportation costs to the real estate transfer tax fund that had historically been charged to the general fund. We also had approval from the voters to expand the use of this fund to cover a portion of the costs of a new swimming pool for which we had capital funds but no operating dollars.

In Moraga, we were able to make similar shifts of costs out of the general fund to restricted funds and still maintain the required "maintenance of effort" for Moraga's transportation services.

The specific techniques are too involved to also cover in this article but in both cases, we converted annual deficits of several hundred thousand dollars to budgets with positive year-end balances of several hundred thousand dollars. In Moraga, we increased the fund balance in the general fund by more than 30 percent during the worst of the recent recession by using IFM.

It is helpful if the entire organization has buy-in to integrated fund management and the agency head is committed to implementing it. Leadership from the top is essential. The other thing that is essential is that everyone sees a potential benefit.

By maximizing the flexibility of the general fund, resources are made available to all departments over time. In order to have real teamwork, staff has to get past the idea that there are winners and losers. Even if it is not their turn this year, they will have a better chance in future years of getting funding for the needs of their department because of the flexibility in an enhanced general fund.

#### **Worth the Effort**

Readers will see this is a fairly complex process if it is done on a comprehensive basis, but it offers the ability to balance budgets without increasing taxes or fees. Done properly it should be well received by elected officials and residents.

It may even gain managers enough credibility to go to the voters and ask for additional funding or increased flexibility in the use of existing funds because it's been shown that available resources have been maximized.

I hope this article stimulates managers to consider applying integrated fund management in a comprehensive approach within their organizations. Even if you just try it for the next unfunded need you have or for a specific structural deficit in the current budget, I believe you will find the process helpful in meeting the long-term financial needs of your organization.



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manager in Snowmass Village, Colorado; and town manager in Moraga, California. Author retains the copyright to this article.

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# PAIII

Nine ways to make it easier to serve your community's residents

By Joseph and JoAnn Callaway

#### **TAKEAWAY**

This article may help change the way you view customers, residents, and friends who are in distress. Not only might you change their lives, you might change yours too.







### WHEN THE ECONOMY TANKFD

in 2008, the way we saw the world shifted. Fear took over. People worried they'd go to work one day and discover they no longer had a job. They worried that they might fail their families, that their retirement savings were gone forever, and that they might never get back on their feet.

For a great many people—maybe including some you are in contact with daily—that sense of insecurity still lingers. In some cases it has led to hectic, stress-filled workweeks that bring less pay, little thanks, and often a host of problems in their personal lives.

In a word, distress.

Distressed residents/customers and employees are everywhere. Sometimes the reasons are money-related, sometimes personal, sometimes a mixture of both. Regardless, when you open your eyes and really notice the pain these people are in, you will have taken the first step toward helping them.

Unfortunately, many people don't want to deal with distressed employees,

residents, or customers. That's because they can be time-consuming. Indecisive. Needy. Maybe even angry and hostile. But rather than avoiding such difficult people, you can embrace them and do whatever you can to make their situation better.

Sincerely putting their needs first regardless of how hard to deal with they may be—is a strategy that has the power to change your life, to transform your organization, and to help bring about financial security. Even when residents and employees make your life a lot more difficult than it theoretically should be, your job—your professional reason for being—is to serve them. And that is never more important than when they are going through their toughest times.

Here are tips on incorporating a customer-first method into the way you interact with distressed people:

Make the commitment. Really putting others first is a big commitment. And if you're comfortable with your current way of doing business, level of success, and relationships with people, that commitment is not for you.

You need to put your own needs second, base all of your interactions on transparency and honesty, and make it your priority to always do what's best for the customer or employee. It won't always be easy: Consciously putting your own best interests in second place goes against the grain of human nature!

But you will find that a lot of the tough decisions—like how to give your best to someone who makes you want to pull your hair out—will practically make themselves.

Realize the benefits of sticking with customers in distress. When you truly succeed in helping a distressed person, you will have built an important relationship. Often, these are the people who go on to tell others how wonderful you are and what lengths you went to on their behalf.

Sticking with your distressed customers isn't just the right thing to do, it makes good business sense. Yes, the economy may be slowly pulling itself out of the dark, deep, and depressing hole known as The Great Recession, but an organization can still be far from booming. How you conduct your organization's business now, when the going is tough, can set you apart and give you a solid foundation in the future.

Learn to like people. Even if you already consider yourself a people person, chances are you still need to learn to like people more. Think about it: Do you hold yourself emotionally aloof from people and complain about their foibles to your coworkers and family, even though you were all smiles during a meeting with them?

Or do you always make a genuine effort to put yourself in their shoes and to learn more about them as people, not just as users of local government services?

To truly put your residents first, for example, your No. 1 goal should be to invite them within arm's length and make each one less of a stranger. It's important to remain professional, but there's no reason you can't strive to make a deeper connection with a person by asking about their kids, their pets, their hobbies, and their jobs.

Sometimes it's not easy to like people. They can be difficult or have bad attitudes, and they can be a source of pain, ridicule, and embarrassment. But if you get out there and engage, you'll find that most of them are just like you: filled with worries, hopes, and dreams.

Get comfortable with out-of-control emotions. We're all human. And while it's true that most of us try to leave our emotions at the door, it's not always possible. Sometimes our fear, pain, and anger just spill over. If a resident loses

they reach you. You and the customer will be better off.

#### Honesty is always the best policy.

When people are distressed, they need the truth. Yet when things aren't going well, our instinct is often to sugarcoat, to paint a picture that's a little brighter than reality actually is. When you do that with a distressed person, you might be able to placate them in the short term, but if things go south, they'll bottom out.

Instead, look them in the eye and say, "This is the reality. And here's what I'm going to do. Remember, I'll be here every step of the way."

Kidding distressed customers, or sitting back and letting them kid themselves, can be costly. When you are truthful, you know you're doing the right thing. You don't feel as if something was left unsaid or undone.

**Stay competent.** Often, it's the best way to help your customers. Hone your management skills. Take a class. Attend a conference.

REALLY PUTTING OTHERS FIRST IS A BIG COMMITMENT. AND IF YOU'RE COMFORTABLE WITH YOUR CURRENT WAY OF DOING BUSINESS, LEVEL OF SUCCESS, AND RELATIONSHIPS WITH PEOPLE, THAT COMMITMENT IS NOT FOR YOU.

his or her cool or bursts into tears, don't get upset. Look at the event as an opportunity to help in any way you can.

Instead of dreading emotional outbursts, think of alleviating the customer's worries, insecurities, and fears as part of your job description. And remember, putting customers first means not reflecting their turmoil back to them. Resist the urge to snipe back or to let yourself be caught up in a feeding frenzy of worry and anxiety. Instead, let animosity and frustration end when

Always care, even (and especially) when your customers or employees don't. Distress can bring with it despondence and ambivalence. If you have distressed employees or are distressed vourself, you know what that means. It can mean phone calls that end with, "Do whatever you want. We're screwed either way." Or, "There's just no hope. I guess I'll have to let employees go."

Care about people who have stopped caring. They don't care whether a local government's budget is shrinking. They

blame the government for not providing what they need. Managers will have to deal with their grief, anger, and remorse.

Consider your "karma bank." Serve every person, regardless of the return on investment of time, energy, emotions, and money. We believe there is a karma bank out there somewhere, and when times are particularly difficult or a customer or employee is a real pill, remind yourself that you are making deposits in your karma bank.

And guess what? While we've learned not to have firm expectations when it comes to karma, our efforts and goodwill usually come back to us multiple times over.

Help people look to the future. (It's a bright one for them and for you.) Most of us need to be reminded from time to time that "this too shall pass." Distressed people are no exception. When they are up against the wall and feeling hopeless, you have to help them look to the future.

Emphasize your willingness to help them through whatever crisis they're currently facing and then let them know what the future can look like once the problem is resolved.

You may be dealing with a resident, employee, friend, or maybe even more than one, who is struggling to see the bright side. By simply letting them know that you're committed to helping them in whatever way you can is a great first step in helping them feel better.

Knowing that someone is on their side can ease their stress at a time when it feels like the world is conspiring against them. Take care of people during these dark days, and they'll take care of you down the line. Everyone wins when you strive to serve.





**JOSEPH CALLAWAY** AND JOANN CALLAWAY are coauthors of the book Clients First: The Two Word Miracle, Phoenix,

Arizona (John Wiley & Sons, Inc., October 2012, ISBN: 978-1-1184127-7-0, \$21.95; www. clientsfirstbook.com).

BY RAYMOND LEE III

#### REFLECTIONS OF AN EARLY CAREER PROFESSIONAL

#### Challenging times presage need for new skills

iscussions with other new entrants into public administration have uncovered similar perplexing questions challenging our personal and professional perspectives. In our early days in the local government management arena, some of the lingering questions racing through our minds are:

- Will I be able to find a challenging job and in which community?
- Have graduate school and discussions with my professors and mentors prepared me for what I am about to face in the real world of public management?
- Do I possess the skill sets and knowledge base to manage people and lead organizations in the direction that best serves the community?
- Can I take theoretical approaches to solve the issues of today's local governments and make them practical?
- · After years of higher education training for a management career, will I find personal fulfillment working in local government?

Young professionals have been trained well by higher education institutions on the issues confronting local governments and related best practices. Professors and mentors have asked thought-provoking questions regarding theoretical views and concepts of having efficient, effective, and economically feasible government systems as the foundation of any thriving community.

These concepts have become embedded in young professionals' DNA. It is already becoming clear to many of us, however, that the next generation of public management leaders will

need a special set of skills to advance their organizations to the next level of effectiveness and to serve and protect residents and properties.

#### Challenged at the Get-go

Coming into the public administration arena during a climate of economic uneasiness has had an enormous impact on our outlook concerning necessary financial management skills. Those of us who have been active participants in the budget process have experienced how organizations have made difficult financial decisions regarding service delivery with fiscal constraints.

We have seen our organizations reevaluate essential core services. Organizations are being forced to balance their budgets with a complexity of state and national mandates, yet provide the level of service that residents have come to expect.

We have heard the concepts of transparency, fiscal accountability, engagement, and sustainability echoed throughout our organizations. Although experiences and observations have reinforced the need for strong fiscal management ability, we have also realized the need for skill sets in the following areas: politics, capital resources, community relations, and cross-functional leadership.

**Political astuteness.** The concept of political astuteness is rarely mentioned to young public professionals but is possibly one of the most essential skill sets that a young administrator needs in his or her toolkit of attributes. We are observing more widely disparate interest groups and distinctly different political philosophies among elected officials and residents.

Managers must have the fortitude and skills to assist in determining a course of action in the midst of electoral position changes, diverse interests, and varying approaches to issue resolution. Emerging managers must be able to promptly anticipate issues, identify the stakeholders or power bases that are involved and impacted, and help create a unified plan that residents and elected officials can accept as a feasible strategy among divergent interests.

More than in the past, managers will be thrust into the role of consensus building among diverse constituencies and among elected officials. Their roll will be to derive workable and acceptable solutions to issues in policy development and implementation.

Managers will continually find themselves in a position to assume the responsibility of cautiously guiding, leading, and developing policies to present to elected officials. This needs to be done without being intrusive, overstepping authority, or telling elected officials what to do.

This dichotomy of roles will definitely require the skill of political astuteness. The manager does not become a politician but is a leader from the standpoint of monitoring the pulse of the interaction between residents, interest groups, elected officials, and staff concerning delivery of services and encouraging resident input and participation.

#### Capital resources astuteness.

Current budgets have been prepared and adopted during a time of unprecedented economic uncertainty. The real estate and financial markets are under tremendous strain, inflation is unpredictable, and unemployment is higher than desirable.

As a result, local governments can continue to experience a slowdown in revenues, particularly in such economydependent revenues as sales taxes and real estate excise taxes, which as we know is a major source of local government funding. More than ever, it is vital for future city and county managers to have a strong knowledge base of local finances.

Not only will future managers need to understand public finances but also the economics of the private sector and how local government actions trigger adverse impact on their profits. They have a stewardship obligation to all taxpayers to ensure their monies are wisely and ethically used. They also must stay current in the skills of budgeting, financial trends monitoring and forecasting, program performance measurement, and technological advances.

Numerous young professionals hear the term capital resources and only think in terms of monetary capital; they often overlook the significance of human capital that includes personnel and staffing. Emerging managers must acquire skill sets to actually manage the human

tors, board members, quasi-governmental agents, contractors, media sources, and residents. This has heightened our understanding of the need to master communication skills and to be prepared to communicate effectively in the often tense workplace and the complexity of community situations.

Even though we are young, we are being thrust into meetings and briefing situations with peers, management staff, elected and appointed officials, contractors, and residents. We have come to understand the importance of doing our homework, being prepared with accurate data, and speaking confidently and persuasively.

Future managers will need the ability to adapt to the changing cultural com-

results and knowing when to modify to obtain the overall results for which the organization is striving to achieve.

It is important to know the technical components of strategic planning—the environmental scans in which the organization's strengths, weaknesses, threats, and opportunities are explored. But it is more critical to actually possess the know-how to make the paper plan become a living document and influence others to internalize and be motivated to help achieve the strategic goals and objectives of the plan with measurable results.

Because of the many leadership and operational tasks assigned to the manager, an essential skill required is the ability to effectively multitask, organize, prioritize, and delegate tasks that are

ALTHOUGH EXPERIENCES AND OBSERVATIONS HAVE REINFORCED THE NEED FOR STRONG FISCAL MANAGEMENT ABILITY, WE HAVE ALSO REALIZED THE NEED FOR SKILL SETS IN THE FOLLOWING AREAS: POLITICS, CAPITAL RESOURCES, COMMUNITY RELATIONS, AND CROSS-FUNCTIONAL LEADERSHIP.

capital and to create work environments that will empower and motivate employees to perform at their maximum potential and provide opportunities for continuous learning.

Possession of this skill allows young administrators to achieve goals, objectives, and results that have been set for the organization on time, with optimum efficiency, and within budget. If these administrators, myself included, do not possess the technical skills and understand the importance and the critical nature by which we must manage physical, financial, and human resources, our future will become gloomy in responding to and addressing resident needs.

#### Community relations astuteness.

Young professionals are observing the vast amount of communication required of managers. Continuous discussions are held with staff, councilmembers, legisla-

plexities in communities. The mastering of communication skills allows the manager to better generate collaborative working partnerships while serving in a role as community liaison.

Another aspect of community relations astuteness is the skill of emotional intelligence and acquiring the ability to manage one's own and others' feelings and emotions, to be able to discriminate among them, and to use this information to appropriately guide thoughtful responses and actions.

**Cross-functional leadership astuteness.** No longer can managers be specialized in one specific area (i.e., engineering, finance, public safety, economic development). Attention to the broad picture of the organization is needed, with the know-how to envision and move from vision to plan, from plan develop-

ment to plan implementation, evaluating

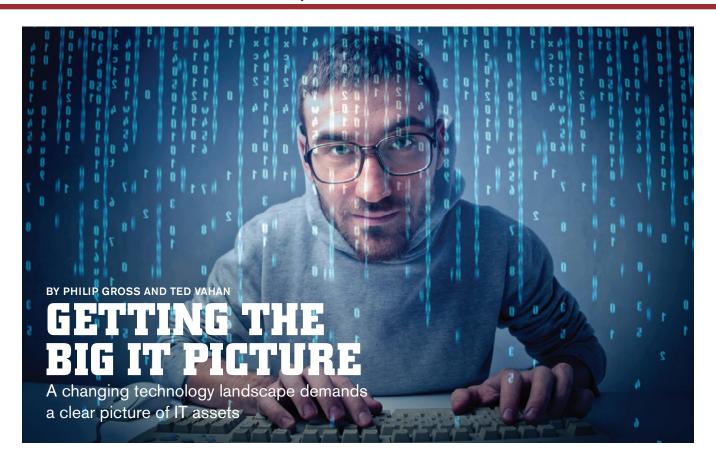
essential and must be completed in a timely and organized manner.

#### **Moving Forward**

Regardless of your generation, gender, or political affiliation, I believe there is one aspect that all public administrators must agree on, the future of our profession, and sustainability of quality local governments depends on a well-trained and prepared generation of new managers. Young professionals now entering the field of public management are gaining valuable experience, through observation and participation, which is increasing the skill sets and the knowledge base of local government. PM



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he information technology (IT) capabilities of your organization are likely more complex than ever before. IT is extending out of the in-house data center to include such capabilities as third-party application providers, outsourced data centers, and the Cloud. At the same time, more tools are available for end-users to develop their own IT capabilities. This changing technology landscape makes it imperative that organizations understand the full range of their IT systems and applications to lay a firm foundation for cost-effective management of these resources.

Having a full, up-to-date inventory of IT assets, including hardware, software, and service agreements is a critical key to controlling IT costs. A 2012 study conducted by International Data Corporation (IDC), and sponsored by Flexera Software, noted that 56 percent of respondents said that 11 percent or more of their application maintenance cost is associated with applications that are under-used or over-licensed, up from 49 percent a year earlier.

Talk about wasted resources! Here are three tips on how to start getting the big picture of your IT resources and costs under control.

#### **Pinpointing Resources**

Reduce spending on underused software products. Develop an inventory of systems and applications, including the physical location of assets and the personnel who work on these systems. You may be surprised to find there are capabilities being paid for that your organization no longer uses.

It is imperative to document the entire portfolio. Are you, for example, paying for Microsoft Office licenses for staff who only need one or two applications versus the entire suite? Have you licensed a full accounting package but aren't using all of the modules that you are paying for?

In a review of the "official" IT spending of one organization, we found that the organization had invested a significant amount in applications and other tools to support the organization's computing

needs. When workers were asked how they actually used and stored data to do their work, it became clear that an equal amount of money was spent on systems that were not part of the official portfolio. The workers had developed their own IT capabilities ranging from separate databases to spreadsheets to manual files to support their actual work.

Leverage effective informal **\*\*2 systems and processes.** Conduct a study to identify key organizational or business processes and the information and systems that support them. This may uncover such "unofficial" systems as Excel spreadsheets or Access databases that have become the de facto primary sources of data for some key processes.

These systems and related data may be useful elsewhere in the organization and, combined with the previous tip, will provide a more complete view of IT spending and capabilities in the organization. In the past, we have seen systems in one department generate reports that are then manually entered into a system

in another department. We've also seen different departments developing systems to perform similar functions.

#### **Leveraging Existing Capabilities**

If you review systems usage across departments or agencies, you may discover the same vendors being engaged or similar systems being used in different agencies. Without a coordinated initiative, you may not be leveraging your total spend or negotiating position with the vendor. These types of situations also present a possible opportunity to negotiate shared arrangements.

The Office of Management and Budget has directed the heads of executive branch agencies to use shared services for all future financial systems. The document, produced by the Shared Services Subcommittee of the Federal Chief Information Officer Council (CIOC), can be found online at https://cio.gov/wp-content/uploads/ downloads/2013/04/CIOC-Federal-Shared-Services-Implementation-Guide.pdf. All of which leads to the next suggestion.

Reduce costs by leveraging software or capabilities already in use at other organizations. Consider the use of shared systems or services within your local government organization and/ or with neighboring jurisdictions.

#### **A Complete View**

Increasingly complex IT systems require active management, a comprehensive understanding of current IT assets, and a full assessment of new technologies and third-party services. Only by fully understanding what makes up an organization's total IT environment will you be able to effectively manage the investment being made in IT resources.





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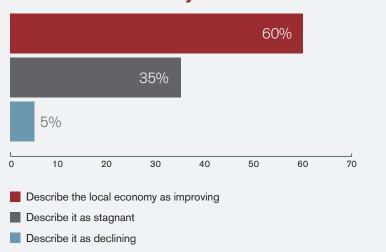
expensereduction.com), and TED VAHAN is a director and practice lead for information technology, Expense Reduction Analysts, Huntersville, North Carolina (tvahan@expenser eduction.com). ERA is an ICMA strategic partner.

#### state of the profession

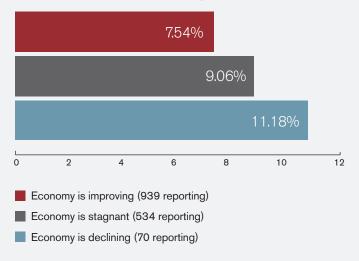
#### BY THE NUMBERS

ere are charts that show, first, how respondents to ICMA's survey State of the Profession 2012 describe the local economy. Compare these responses to the second chart to see how the average unemployment rate compares with respondents' description of the economy. PM

#### Status of the Economy



#### **Unemployment Rate in Communities** Where Survey Respondents Reported on Their Local Economy



BY NATHAN THIEL

#### **SHARING SUPPER**

Dining together strengthens a community

magine a few local businesses donating money and manpower to provide a free hot meal for anyone in your community. Imagine your local school offering its cafeteria and commons as the location to host this event. Imagine the event including education, health, nutrition, entertainment, and kids programs. Imagine residents of all demographics, young and old, male and female, rich and poor, coming and sitting down at tables to discuss issues facing the community while enjoying a meal together.

This event is no soup kitchen.

Now, imagine your community supporting this event each month for six consecutive years. Welcome to an activity called Sharing Supper and to Mauston, Wisconsin.

I came to be the manager of Mauston, a small rural community of some 4,500 people, in 2010. When I arrived, it was your standard small-town community, with standard issues as well as typical hidden treasures. However, when I learned about Sharing Supper and attended the event, it was a redefining moment in my career.

Despite all other time commitments, I immediately pledged to attend this unique program each month, and have now for a year. It has been a significantly rewarding experience. I believe it is a model that works and is replicable. This article outlines how this event came to be in Mauston, and why it would benefit you and your community.

#### **Nourishing the Soul**

The success of Sharing Supper is really a tribute to Margie Strouse, a dynamic community organizer. As a participant in Juneau County's Advanced Leadership Program in 2007, Margie developed Sharing Supper as her community project. The first event was hosted

in March 2007 at a local Moose Lodge Family Center in Mauston. Approximately 180 were in attendance.

From there the program only grew. In the past two years, it has never served less than 200 meals each time. By 2011, attendance demanded Sharing Supper move to the local high school to provide adequate space for the increase in attendance and programing.

In December 2012, more than 800 attended. Sharing Supper is also expanding its reach to other communities. Currently, several Wisconsin communities like Wisconsin Dells, Calumet County, Adams County, Middleton, and Madison have either implemented or are in the process of partnering with Sharing Supper.

#### **Meeting Multiple Needs**

Sharing Supper is more than a meal, because hunger extends beyond food. While food is an important ingredient and Sharing Supper organizers will readily admit that the meal helps some individuals and families make it until the end of the month, food isn't the only reason to come or the only need being met.

**People need to serve.** Sharing Supper provides a venue for local businesses, organizations, and individuals to serve the community. A typical event requires between 250 to 300 volunteer service hours. The program estimates that more than 12,000 service hours have been donated between 2007 and the beginning of 2013.

More than 53 organizations, businesses, families, and individuals have sponsored events with a \$300 contribution. The majority of those have sponsored multiple times. Many attendees also place smaller donations in the donation box at the entrance during each event.



People need to talk and network. One of the largest draws for Sharing Supper is the opportunity to network and talk. In my attendance, I have started making rounds from table to table, and ask, "What is the good news?" I have been amazed how positive the conversations remain in this public setting. Typically, either the table will want to learn what is happening in Mauston, or an individual will want to share an idea to improve the community.

Because so many community partners are involved like the chamber of commerce, Lions, American Legion, Kiwanis, Future Farmers of America, 4H, Girls Scouts, and local churches--to name a few, the event has become a networking opportunity. At every event there is representation from the school district, the city, and the county, affording easy access to officials and social programs.

People need to learn. What sets Sharing Supper apart from a simple soup kitchen is its programing. Sharing Supper features a kids' corner, seniors' activities, nutrition demonstrations, and health and wellness resources. The programing is a significant draw.

Though a community meal is not new, the innovation of Sharing Supper is its consistent invitation to come to the table, to serve, to share, to listen, to build community and to nourish the soul.



NATHAN THIEL City Administrator Mauston, Wisconsin nthiel@mauston.com BY MICHAEL CONDUFF. ICMA-CM

#### ONE BAD APPLE

How to keep the rest of your council from spoiling

he small-group discussion at a state meeting this past winter on the subject of council relations was filled with seasoned managers, and I was looking forward to facilitating and learning from this group of colleagues.

The first participant lived up to my expectations by stating right up-front: Taken as a whole, I actually have a great council. In fact, as a group, I generally give them high marks on the council effectiveness metric that ICMA offers. With that said, however, I do have the councilmember from Hades. The chorus of "me toos" quickly led us to change the table topic to "challenging councilmember relations."

I took a quick poll, asking how many of those in the group, on balance, would rank his or her council as a whole as effective or even highly effective in their governance role? All but one or two of the participants raised their hands.

#### **Challenging Behaviors**

Then I asked how many of those who had raised their hands had at least one member with whom it was difficult or extremely difficult to work. Most hands went up again, and a few "impossible to work with" were muttered.

I asked for some examples of these members' challenging behaviors, and here is what I heard:

- Treats every staff presentation as an inquisition.
- Routinely discloses confidential information to the media.
- Spends all of his or her time on minutia and misses the big picture completely.
- Never comes prepared for a meeting and regularly asks questions that were answered in the packet of materials that was distributed prior to the meeting.

- · Never willing to bring closure and always wants more information before a vote.
- · Refuses to abide by the meeting rules of order.
- · Always tries to make the staff (and the manager) look bad.

#### **Intervention Strategies**

A colleague asked how he could keep one member from infecting all of the rest because they watch his antics and come down to his level of behavior more often than they bring him up to theirs.

In the course of the hour we agreed that the ideal governance situation is that the manager doesn't have to be involved in council discipline at all. The mayor or the most senior or most influential member would take the repeat offender aside and help him or her see the good governance light.

In most cases, though, the brunt of the challenging behavior is directed at administration and so logically some of the intervention must, too. Here are strategies the group suggested:

- Meet with the member individually to try to determine motive.
- Use some of the personality profiling tools to help educate the member and others.
- · Accommodate the member where possible and when it is not unethical or unduly burdensome to do so.
- · Assure the member that you work for the council as a whole and intend to follow its direction expeditiously.
- Be as responsive and transparent as possible.
- Don't take it personally even when
- Keep the member fully in the loop and don't avoid communication or meetings.

#### **An Ounce of Prevention**

The group also agreed that in retrospect they wished they had done more to help the council establish good governance procedures before the disruptive member had come on board, but putting good governance procedures in place when councils are supportive sounds silly. "They already govern well, why push process on them" is a common phrase I hear.

My reply uses the same logic as negotiating an employment agreement when everyone is friendly. In cooperative times, it is challenging and doable, and in difficult times, it is often impossibly difficult to do. Develop a council process manual when the group is cohesive and behaviors make sense.

Where possible, it is always preferable to have a ready pool of potential council candidates. Citizen academies or leadership programs help educate and identify prospective members. Matriculation to major boards or commissions by council appointment deepens their exposure to the governance system. Consequently, when a council opening occurs, someone with the desire and acuity to serve is ready to step up.

An ethics caution: While these steps necessitate a consistent progression that is often only sustainable with input and nurturing from the manager's office, it is incumbent that even the appearance of engaging in the actual political process be avoided.

At the conclusion of the session, we all looked at each other and agreed that sometimes it just feels good to vent and at the same time, everyone went away feeling like they had some cogent strategies to keep the council as a whole in an effective range. We hope these steps are useful to other managers, too. PA



MIKE CONDUFF, ICMA-CM Former City Manager President and CEO The Elim Group Denton, Texas











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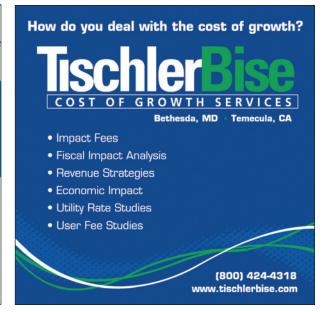
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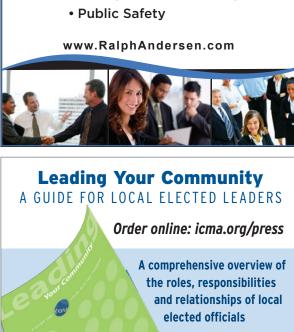
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BY MICK BERRY

#### MISTAKES HAPPEN

Mentor teaches a rookie a lesson he'll never forget

udy (last name not used here to protect the innocent) had been the county budget manager about a year when she hired me fresh out of graduate school. She had been the county's purchasing agent for a number of years and had won the confidence and trust of a rigorous county manager.

She had surmised that was the main reason he had promoted her to budget manager, a job she didn't really want and one that didn't really suit her talents. Judy was a people person, not a number cruncher. But she had accepted the job and was doing her best to adapt.

In graduate school, I'd become somewhat expert in Lotus 123 (a precursor to Excel for anyone under the age of 45) and was comfortable with PCs. The county was just starting to deploy desktop computers and use them to supplement the mainframe finance system.

#### The First Big Project

My first week on the job was the time for final approval of the fiscal year budget by the county commissioners, so Judy and the senior budget analyst were breathing a sigh of relief, because it had been a tough learning curve. Our next major project was the five-year financial plan.

The senior analyst had worked on it the prior year, while Judy was still in purchasing, and as the analyst began explaining to us how it was done with the mainframe system, I quickly realized that a spreadsheet would be much more flexible, with the ability to do lots of what-if analysis and sophisticated charts, plus integrate the text explanations into the end product.

After a few demonstrations, Judy said, "Alright whiz kid, let's do it." I was happy for several weeks, building complex spreadsheets and printing out charts—we were definitely going to wow the county manager.

#### A Kick in the Gut

Four days after Judy had given the manager our five-year plan, I was looking at the spreadsheets and suddenly something didn't look right. A change made on Row 23, Column A, should have had a positive impact on Row 75, Column J, but it didn't.

Within the minute, I was knee deep into my first career "kick in the gut" moment (but certainly not my last). There was a mistake, and it wasn't a small one. The forecast was completely later she came to my office and asked if I knew how to fix it. I did. It was Friday, and we decided to work during the weekend to generate the corrected plan.

In typical Judy fashion, she started joking about it, and we laughed about having a Little Rascals moment by sneaking into the manager's office and simply switching the reports. She took all the heat, and there was a lot. She never threw me under the bus although I deserved it. She handled the rocky beginning of my career and our relationship with humor, grace, and understanding.

We prepared the county budget together for five years after that. I left to take the position of a county manager in

#### I WILL ALWAYS REMEMBER WHAT HAPPENED-HOW EASY IT WAS TO MAKE A SIGNIFICANT MISTAKE, HOW IMPORTANT IT WAS TO OWN UP TO IT, ...

wrong; instead of surpluses each year over the next five years, we had a deficit that grew each year.

Although I had only worked for Judy a month or so, I liked her a lot. She was a good person, a funny person, cared deeply about the county, and was someone I didn't want to let down or worse, get in trouble. I sat quietly the remainder of that day making sure I understood the mistake, slept on it, and then told Judy the next day.

#### **How to Handle a Screw Up**

Her response was of the kind that included the words: "Please tell me you're kidding? Are you sure? How could it be that wrong? We just gave it to the county manager, and he's already given it to the commissioners."

She had trusted me with an important project, was already feeling insecure in a new job, and had just finished a rough, first-budget process. There were tears welling up in her eyes.

I slinked back to my computer, leaving her alone to process the information and decide what to do. A few minutes

a smaller local government and then in an odd twist, came back and was Judy's boss as assistant county manager in the same county where I started, before being appointed city manager, again in the same county.

I shared this story in our city's supervisor/leadership training class a few months ago for several reasons. I will always remember what happened—how easy it was to make a significant mistake, how important it was to own up to it, how good it was to have someone assume the ramifications of such a mistake, and how nice it was to work with someone who could face adversity with both sincerity and humor. I try to emulate Judy's example and encourage our supervisory team to do likewise.

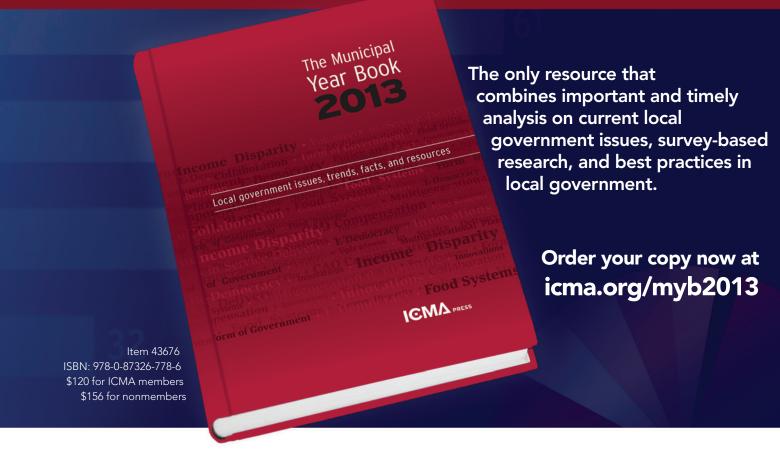
I called Judy, now retired, on my way back to the office, catching her completely off guard, and thanked her for being such an extraordinary mentor and friend. We had a good laugh together. PA



**MICK BERRY** City Manager Hickory, North Carolina mberry@hickorync.gov

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