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Give Yourself Permission to Manage

So how do managers do it? How do you stay on top of operations without being labeled a top-down, directing micromanager? It isn't easy, but it can be done by imposing rigor and discipline in your schedule and the schedules of those who work with you. Find out the three systems you need to have in place to do this effectively.

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Give Yourself Permission to Manage

by **Julia Novak and Steven Burkett**

Employee empowerment. Collaborative decision making. Servant leadership. These are the leadership buzzwords of contemporary management. With each of these phrases, a manager is provided a mental picture of how a good leader leads an organization.

These phrases describe styles that are effective and important for managers to adapt to their own settings. We cannot, however, use them or anything else as an excuse not to manage. Our profession is, after all, local government management.

The goal of management and the role of the manager are to achieve a balance between ensuring day-to-day services are provided by employees, and creating the optimal environment. The common denominator of all the approaches to leadership and management is to create an organization that attracts talented employees and leads to high performance and quality services.

As local government managers and advisers, we have seen managers being apologetic about doing just that—managing the organization. They are concerned about being labeled micromanagers because they ask questions about operations. They have been told to focus their attention on building relationships, and they interpret that mandate as requiring them to be soft and hands-off.

In fact, one of the most important keys to effective leadership and management is to ask the right questions. Although the manager may not need or want to be obsessively detail oriented, it is important that others in the organization are.

In our interaction with managers and as managers ourselves, we help managers implement contemporary leadership principles, but, at the same time, we urge managers not to abdicate their responsibility to manage the organization. Consider this to be your permission slip to be the manager again.

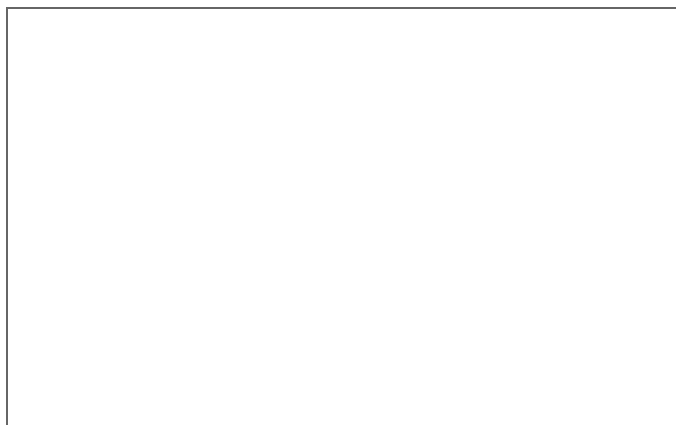
THE CHALLENGE OF BEGINNING

It is a daunting task to decide to change how the organization has (or has not) been managed. New and tenured managers face similar hurdles when they decide to implement a management system. The challenge is the same, but the nuances can be different.

Some new managers come in from the outside, and no one in the organization really knows them or how they work. Some have been inside the organization for a while, and they move into the top seat and must take over the leadership role.

Regardless of where they came from, new managers can be reluctant to implement management systems because they do not want to be labeled as having a command-and-control style or appear to be top-down managers.

As a result, they focus their attention on current issues and whatever is brought to them. Period. Unfortunately, in such a situation the manager is abdicating responsibility for leadership by letting someone else set the agenda and define the strategic direction of the organization.



Managers who have been in the organization for a long time have to clear a special hurdle when they try to implement new management systems. People who have worked with a manager for a while often put up all kinds of roadblocks to adapting to a new system.

They are likely to know what issues to bring, as well as what not to bring, to the manager. They will play to this because it is human nature to turn other people's attention to what they want that person—in this case, the boss—to focus on. Then the boss will stay away from the details! In these situations, the manager continues to be sidetracked by issues and has a hard time getting down to the business of managing the organization.

Let's face it. Every manager has a bigger job than can be done in a reasonable workweek and can spend time bouncing from one hot issue to another, whether it is a controversial rezoning, a difficult personnel issue, or a new council that must be trained, oriented, and understood.

If it isn't the managers in your organization lining up outside your door with issues that must be dealt with, it is members of the governing body, citizens, customers, members of the chamber of commerce, or an assistant who knows about an otherwise quiet issue in which the manager should intervene. These are the important things your days are made of, and in many ways they are what makes the job of managing local governments fun—or at least not boring!

But what percentage of your fleet is out of service during a given week? What is the time lost due to injury or sick leave in your sanitation operation? Where on the critical path is the newest stormwater detention facility capital project? In what direction is the crime rate headed?

And while we're on the topic, how is staff turnover? What is the average condition of your streets? How long does it take to issue a check to a vendor? What is the accuracy rate of payroll checks? How much does it cost to issue a payroll check? How many of your building inspectors are certified by the International Building Code (IBC)?

How can the manager possibly be expected to know answers to detailed questions like this? That is why we pay our department heads (or assistants) six figures, right?

Wrong.

The job of the manager is to manage the business of the organization. While any one of these measures may not be important at any given moment, the reality is that you must have a corporate system for ensuring that important measures of effectiveness and efficiency get to the top. Such a system allows the manager to monitor the results of the organization and ensure that the day-to-day work of the organization is focused on the local government's strategic objectives and long-term goals.

Managers must know the status of key projects. If they do not, they will be trapped managing issues when things go wrong instead of addressing performance trends before they become a crisis.

You cannot allow yourself to be consumed by issues and forget that you must actively manage the big-picture organization. The business of government is focused on two key things: operational (program) performance and project management. Addressing urgent issues is important, but no more important than ensuring every department is operating as efficiently and effectively as it should.

In his book, *Good to Great*, author Jim Collins describes Level 5 leadership as being critical for helping companies break through from good to great. What is unique about Collins's leadership model is that he has specifically defined Level 5 leadership as one of five specific skill sets the leader must accomplish. And in order to be a Level 5 leader, you must also be skilled at levels 1, 2, 3, and 4.

Level 3 in Collins's hierarchy is being a competent manager. What Collins reinforces is that great leaders are also great managers! Management is about structure and discipline. It is not about fads and trends. It is management that gives an organization the stability and consistency it needs to thrive. Management is not delegated by great leaders; it is encouraged, supported, and, above all, practiced by them.

So how do you do it? How do you stay on top of the operations without being labeled a top-down, directing micromanager? It isn't easy, but it can be done by imposing rigor and discipline in your schedule and the schedules of those who work with you.

You need three systems in place to do this effectively.

1. A system for managing organizational performance through individual work plans.
2. A system for managing key projects.
3. A discipline of structured, regular one-on-one meetings between you and your direct reports.

MANAGING ORGANIZATIONAL PERFORMANCE

The everyday business of what our organizations do happens at a program level. We pick up trash, we fill vacancies, we conduct inspections, we immunize people, we provide after-school child care, and we provide introductory ballet courses. Each of these



SOURCE: Good to Great, management book by Jim Collins, 2001, page 20. © Harper Collins Publishers, Inc.

activities is part of the programs that feed into our organizational hierarchy. These programs provide the building blocks for a system of managing performance.

Our program managers track “things”—how many people sign up for ballet, get flu shots, and apply for jobs. The workload data exist. The job of a manager is to translate the workload data into measures of efficiency and effectiveness that are shared up the organizational hierarchy.

Sounds simple, but it is not so easy to do! At each level of the organization, knowledge of the detailed data required to manage decreases. But there is a need-to-know key indicator of organizational performance. Usually, the information the manager needs to know relates directly to the organization’s strategic plan or the governing body’s goals and objectives.

Organizations should have a system for reporting information up through the organization and a system for discussing that information. If management doesn’t pay attention to the details, who will? Nothing will be communicated until there is a problem.

There should be a clear hierarchy of operational data that is tracked by all levels in the organization. While the city or county manager reviews performance measures and reports from all departments at a strategic level, program managers monitor operational performance at a much more detailed level.

PROJECT TRACKING

The same type of information is important to know about projects. Many governing bodies care only about high-profile projects, and maybe you have figured out a way to keep informed of those.

How about the rest of the projects? How did the rollout of the new financial management system go? Are employees happy with it? Did they get the training they needed? Is it performing as advertised? What about the new skate park? Is it on schedule, on budget?

Management must pay attention to project performance, big as well as small projects. You need to know who is accountable for executing a project plan. The manager needs to know what projects are progressing according to plan, what projects are starting to go off course, and what projects require immediate redirection.

The bottom line is that the agreed work and metrics need to be written down and discussed at routine management meetings. After you reach agreement, you can collaborate about the execution of the agreement.

MEETINGS WITH DIRECT REPORTS

The most effective way to ensure that people within the organization communicate thoroughly and usefully about both projects and programs is to have routine, structured meetings where you review operational performance issues, project management information, and hot issues happening in the department. The one-on-one meeting between manager and department head, department head and division head, and division head and program manager is where management happens in an organization.

What about weekly staff meetings? These meetings are wonderful for sharing information and for collaboratively strategizing about issues of organizationwide importance. They are not, however, how the business of the organization is managed. City and county managers must lead and manage their organizations and ensure that their subordinates are managing their departments.

Best-practice organizations have a consistent methodology for managing in every department. Sure, styles differ, and some departments require more or fewer one-on-one meetings, but the fact of the matter is that they all do require them. It is a matter of setting the proper procedures in place to ensure a productive and meaningful dialogue. Such regular meetings provide the opportunity to review work plans and project schedules, to review data on operational trends, and to track progress toward strategic objectives.

PERMISSION TO MANAGE

So yes, collaborate, be a servant leader, and don’t micromanage the good people in your organization. But you do have a duty to actively manage the organization. It is your responsibility to ensure that the intended results are produced for the organization and that core services are provided in a cost-effective and efficient manner. This is

similar to a private sector manager's responsibility to track the financial bottom line.

The best organizations execute well. They invest in their people, they know where they want to go, and they have clear plans for getting there. Don't allow pejoratives to give you an excuse to abdicate your responsibility.

Lead and manage. You have permission.

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A Sustainable Interest in the New Global Economy

by Roger Stancil and Mary Jane Nirdlinger

Interest-based collaboration between town and gown helps community

The theme of the 2009 ICMA Conference in Montreal was “Leading Communities to Success in the New Global Economy.” ICMA Executive Director Bob O’Neill facilitated a session on Peter Block’s book, *Community: The Structure of Belonging*. Block’s work is about bringing people together and initiating conversations that make a difference using the six principles he identifies: invitation, possibility, ownership, dissent, commitment, and gifts.

At the same conference, David Suzuki talked about sustainable development and the state of the environment. His focus was on the unique human attributes of foresight, memory, and the ability to change. But can we really change? And can it last for more than one project?

On June 22, 2009, it took the Chapel Hill, North Carolina, town council about 20 minutes to approve a 20-year development agreement with the University of North Carolina for a new, three-million-square-foot addition to its campus. Just a year earlier, this would have seemed impossible. What made it happen? The Montreal conference offers a framework for reviewing this planning venture between the town and the university.

Residents of Chapel Hill like to think of their hometown as the village at the edge of the Research Triangle. The home of the Tar Heels is also home to more than 50,000 residents and a sizable student population with a long tradition of community activism. It’s no surprise that the university’s plan to develop its 1,000-acre property in the middle of town was a source of contention between town and gown.

For nearly 20 years, the development of this property had been the focus of planning efforts, citizen reviews, political scrutiny, and cross words. Both sides had claimed sustainability as a shared goal, but sustainability often took a backseat to conflicts about traffic impacts, the community’s need for affordable housing, land preservation, and density.

When the university’s need for new research and expansion space brought the parties to the negotiating table again in 2008, in the form of a chancellor-appointed leadership advisory committee (LAC), the same conflicts emerged. The time was right for something new, and a changeover in town leadership helped pave the way.

The council had recently hired me as the town manager, and I saw an opportunity to approach old arguments from a new angle. Town and

WHAT DID IT COST?

- Application fee of \$35,786, paid by the University of North Carolina at Chapel Hill.
- Standard rezoning application fee based on the size of the property to be rezoned.
- Development agreement fee of \$300,000, paid by the university and based on actual time spent by town employees on the agreement. This amount ended up being close to the standard per-square-foot of development calculation used for special use permits in Chapel Hill.
- Consultant fee of \$46,037 paid by the town to the UNC School of Government.



university staffs met to identify lessons learned from past interactions, forge a new connection based on what had gone well, and learn from what had not gone so well. The focus was on identifying shared interests and trying to put aside the well-worn arguments of the past.

Town staff worked closely with Jack Evans, executive director of Carolina North for UNC, Chapel Hill, to fashion a new approach to negotiating an agreement. With Evans's concurrence, the town engaged David Owens, a land-use planning expert and faculty member at the UNC School of Government, to be a neutral adviser to the town.

These new players had another new tool to work with: a firm deadline. June 2009 represented a key time in the town's and the university's evolution, when turnover in leadership was expected on the town council and on the university's board of trustees.

With Dr. Owens's cautiously optimistic declaration that the deadline was "achievable, but not easy," we agreed to begin negotiating from interests, not positions. This required a process that would support the goal, and a joint staff working group was formed. This group of 12 key staff leaders from the university and the town met weekly to hash out the structure of the agreement with Dr. Owens and to shape the joint staff work and public process that would ultimately lead to the adoption of the development agreement. It was a fast, unpredictable, 10-month process, and full of hurdles.

The university's new plan for the property looked to innovative site design and high-performance buildings to meet its commitment to build what UNC-Chapel Hill Chancellor James Moeser had called "a model of sustainability." The town had also been moving toward greater sustainability with its recent construction of a new operations facility, enhancement of stormwater management, and council-led land use planning that encourages higher-density infill growth in the community. As the two parties began to negotiate through a list of more than 20 topics, sustainability rose to the surface as a key interest, sometimes guiding the parties away from their earlier positions.

During the public meetings between the council and the board of trustees, things sometimes still got edgy. One stridently disputed issue was how much and with what level of certainty would the university preserve open space on the parcel. During the earlier LAC sessions, trustees had agreed to limit development to 250 acres for 50 years, but they refused to create easements or perpetual protections that limited the university's ability to use the land in the future.

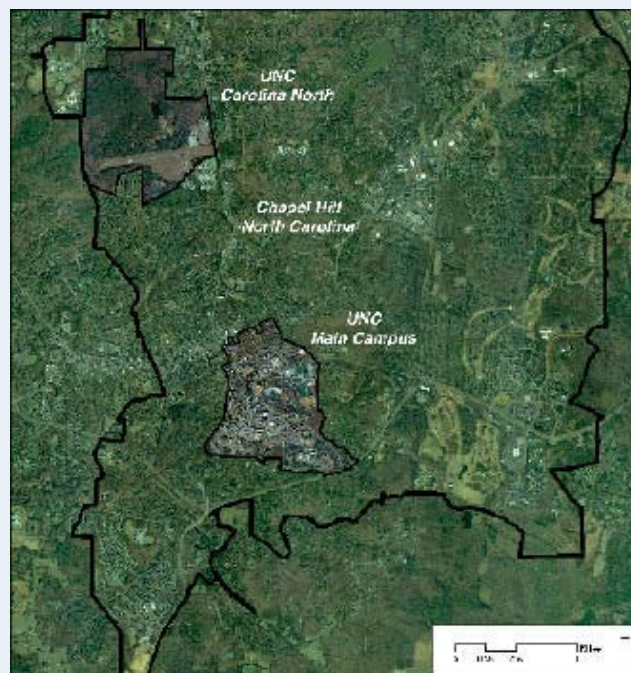
At one joint meeting, councilmembers and university trustees squared off with the familiar "preserve it" versus "absolutely not" argument. In the past, this kind of exchange would have halted the discussions and led to both parties retreating into mutual distrust. Why didn't that happen this time?

The joint staff group had invited the community into the conversation at all levels. They could talk to the trustees and councilmembers; they could meet with the staffs and consultants. There were meetings on topics the community cared about,

Site plan for initial phase of Carolina North project. Up to three million square feet of building development on approximately 133 acres.

WHAT WENT INTO THE DEVELOPMENT AGREEMENT?

- Zoning map amendment (rezoning).
- Land use management ordinance text amendment.
- Development agreement.
- Transportation impact analysis.
- Fiscal impact analysis.
- University design guidelines for Carolina North.
- Ecological assessment of Carolina North.
- Campus master plan.
- Meetings between September 25, 2008, and June 22, 2009:
 - Council-trustee work sessions (11).
 - Regular council meetings (11).
 - Public information and comment meetings (9).
 - Joint staff meetings (bi-weekly or weekly).
 - Town advisory board meetings (some joint) (15).
 - Public hearing (1).



An aerial view of the UNC Carolina North campus, Chapel Hill, North Carolina.

WORKING TOGETHER

Interest-based collaboration is helping the town of Chapel Hill operate differently in several other ways:

including renewable energy sources, transportation impacts, and forest management. Meeting records were online, and the open nature of the process kept everyone aware of what was at stake, what the trade-offs between competing interests were, and where compromises or concessions were made.

As the joint staff group built a base of shared goals by working with the community, the staffs, and the leadership, a new sense of collaboration emerged. Issues were becoming more interconnected through the development agreement, and everyone was beginning to see the relationship between stream preservation and density, between a successful mixed-use campus and lower traffic impacts.

- Developing a way-finding system for vehicles and pedestrians.
- Holding conversations on public art.
- Developing short-range transit planning.
- Implementing new development review technology.
- Finding new partnerships for economic development.
- Continuing economic development.

This focus on the future of the community helped the staffs and the leadership grapple with the long-term horizon of the agreement. Some areas were identified for permanent preservation, and other areas allowed disturbances for utilities and trails. Housing had to be provided, but on a timeline that worked with the university's capital planning process. Traffic impacts would be mitigated, and extra incentives are built in for better-than-expected alternative transportation targets.

The public discussed interim agreements, and the community had real opportunities to shape the final agreement. Residents who participated in the discussions were encouraged to contribute their ideas. Not everything was included in the final draft, but such pieces as the campus-to-campus bike trail requirement were a direct result of community participation. As the development agreement took shape, the working group added provisions for continuing public participation.

A clearly voiced interest in a sustainable future became the focus for nearly every part of the agreement. Although at times people disagreed about priorities or implementation strategies, everyone was able to continue seeing the agreement as an interrelated series of sustainable conditions. No single position became the trigger for failure.

The final agreement is a living document incorporated into the town's established public participation and planning processes. Both parties have committed long-term resources in this shared vision of a sustainable future. The result is an accumulation of gifts to the future.

After working on such a complex project for so long, the staffs found that the habit of looking for shared interests and mutual goals carried over into other areas of common interest.

Chapel Hill and UNC are seeking ways to support and encourage more collaborative work. A debrief of the staffs identified opportunities for shared development of new collaboration skills. The staffs are working together to sustain the new relationship, and, judging by the conversations about bike connections and transportation impacts, things are moving along.

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An Unrealized Opportunity for Revenue, Risk Free

by Ron Blanquie

It's no wonder that risk management's public role is often underused and misunderstood. Government entities have incorrectly concluded that risk management's overall costs can only be tethered but not controlled or reduced.

Public entities in California today face an unprecedented challenge as they try to maintain the levels of public service that their citizens have come to expect. Given the current dismal global economic situation and its adverse trickle-down effect on local government, it's a wonder that more California communities are not filing for bankruptcy.

Federal bailouts and proposed tax increases seem to be the only revenue-generating mechanisms left—or are they? Maybe an ever-present but unrealized opportunity for local governments exists—risk management!

Public entity risk management has historically been viewed as a necessary evil, an expense line item. Governments have viewed their risk management organization as a triad composed of society, the judicial system, and what the insurance industry has forced on them. This perception is further supported by inexplicable insurance premiums, arbitrary claim settlements, and frivolous lawsuits.

It's no wonder that risk management's public role is often underused and misunderstood. Government entities have incorrectly concluded that risk management's overall costs can only be tethered but not controlled or reduced.

One has to realize that risk management is a complex system of independent, interactive, dynamic factors. With appropriate methods, costs can be controlled and managed successfully. When this occurs, a great opportunity can be realized.

In Petaluma's Case

One example where this has been achieved is a small city in California, Petaluma, that has created and implemented a working public entity risk management model that not only reduces overall risk management expenses but also serves as a source of sustainable revenue even in these difficult economic times.

By 2003, Petaluma was experiencing an alarming rise in overall risk management costs, with no end in sight. Many within the city concluded that this was due to random statistical chance. All hoped these adverse trends would decrease with time. Unfortunately, this proved to be wishful thinking.

Petaluma found itself with negative risk management fund balances. The city council and the city manager's office decided that there must be a better way. They decided to hire a risk management consultant to see whether a private enterprise model might improve the situation. The manager gave only one directive: make the invisible visible!

After an initial risk management study and assessment, the project received full strategic and operational support from city leaders. A risk management model was begun. To ensure success, this model had to be customized specifically for Petaluma. A one-size-fits-all approach does not work in a successful risk management program, so a simple philosophy was adopted: The best way to avoid claims and litigation is not to have them. This strategy was concise and direct:



The Petaluma risk management picture at the time looked grim because of the discovery of a number of immediate concerns for this city of 55,000 people:

Workers' compensation reserve fund	- \$2,200,000
Risk reserve fund	- \$438,496
New claims	Up 20 percent
Active inventory claims	85
Active litigation claims	50
Contract risk transfer of claims	Unknown
Recovered insurance benefits, to date	0
Claims subrogation recovery	\$1,200.00
Insurance coverage	Insufficient
Insurance premiums	Rising

Organizationally, it was decided that the risk management and workers' compensation claims handling would be separated. The day-to-day workers' compensation claims processing would remain within the human resources department. Risk management would also offer human resources consulting services to improve performance, and risk management would report directly to the city manager's office so that its priority was visible and enforceable.

The city declared exactly what the risk management mission was: "Identify, manage, control, minimize, or eliminate risk, to the extent that citizens, personnel, and property can be reasonably protected from hazards, while ensuring that the financial solvency of the city is secure." The city decided to contract with a consultant to create the new risk management prototype. The team was created with the understanding that later it would be integrated into the city.

What to Avoid

The new risk management strategy included creating, documenting, and measuring new programs, including:

1. Updated contract and insurance risk transfer programs.
2. On-site consulting programs.
3. Specialized city projects, assessments, or both.
4. Training programs for city staff, residents, and business owners.

What to Recover

Programs and procedures were developed and enhanced to maximize the city's success in recovering monies owed or that could be rebated. Historically, Petaluma had not been successful in recovering monies owed to it by entities not identified or reluctant to pay. The city's own insurance carriers had denied some of its insurance claims. Petaluma also had an opportunity to receive future rebates and decreased insurance premiums. This would occur only if the city's claim frequency and severity were reduced and its risk management best practices were successful.

What to Mitigate

Insurance procurement offered another opportunity to reduce the overall costs of claims. It was decided to analyze the city's insurance and self-insurance coverage and premiums annually and to seek cost reductions and solutions when and where appropriate. Individual claims litigation strategies and tactics were also formulated and implemented to reduce overall claims and litigation expenses as well as improve public relations.

The city mandated personal contact from risk management personnel with both claimants and their attorneys. This practice would lead to better explanations and more successful resolutions of the often misunderstood government tort claims. It was also decided to create and implement a team-based approach to resolve complex litigated cases. This litigation intervention would involve all shareholders, the plaintiff, plaintiff's attorney, defense attorney, department

head, risk management, and contractors.

Fast Forward to 2009

After six years of documentation, establishment of benchmarks, citywide cooperation, training, implementation of best practices, and just plain hard work, an unrealized result occurred. The benchmarks demonstrated a marked improvement from 2003.

These results do not include the amount of savings from successfully negotiated claims and litigated cases; neither do they calculate any savings realized by the risk management consulting services or special project programs. The results were also confirmed by independent auditors and consultants. These results are:

Worker's compensation reserve fund	\$6,590,299
Risk reserve fund	\$6,667,000
New claims	Down 40 percent
Active claims inventory	Down 74 percent
Active litigated claims	Down 88 percent
Contract risk transfer of claims	Up \$4,021,100
Recovered insurance benefits	Up \$1,442,045
Claims subrogation recovery	Up \$612,874
Insurance/self-insurance rebates	Up \$656,607
Insurance coverage	Expanded and limits raised
Insurance premiums	Down 32 percent

Consistent with the original mission statement, excess risk funds were given back to the city. Cash rebates, for example, were put back into various city funds, and no city department has been charged for any risk services, claims, and insurance for the past year. They were free.

Although most local governments in California continue to face unprecedented financial challenges, an unrealized opportunity exists. A successful risk management program can result in cost reduction as well as generate a sustainable source of revenue. Something to think about.

Ron Blanquie is risk manager, Petaluma, California (rblanquie@ci.petaluma.ca.us). Author retains article copyright.

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Managing Local Government Records

by Neil Simons

A variety of technology solutions can help local governments manage their records in today's often demanding and litigious environment, but evaluating whether a specific solution serves your needs can be a challenge.

To ensure that you select the right solution for your government, consider the following five criteria.

Will the system help us meet our unique records management objectives? Begin by understanding and clearly documenting the records management vision—for both electronic and paper records. Records today are more than just blueprints, budgets, and board minutes stuffed into metal file cabinets. They can be physical or electronic, and they often span the spectrum from physical files to photos to e-mails to databases. As a result, many records management solutions track a spectrum of different record types. Some track only physical records, some track electronic records, and some track both in the same system.

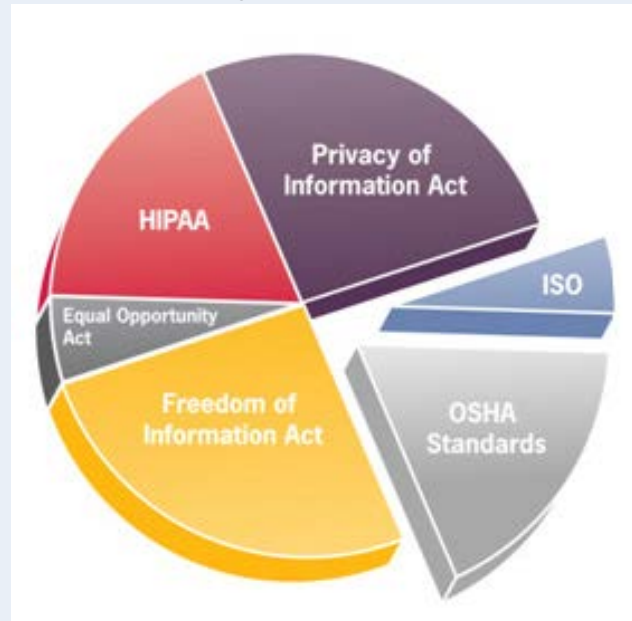
When you evaluate the options, consider records management needs. If your city or county maintains both physical and electronic records—say, paper case files as well as digital property tax records—you may find a unified records management system that integrates both electronic and physical records in one system to be your best option. These systems manage both types of records out of the box so there is no need to scan older records. In addition, they give you a single, clear view to all records rather than force you to use two separate systems.

In addition, consider the entirety of your system requirements. Understand the taxonomy, or classification, of the records you track. Learn about the processes your various agencies use, from document creation to record designation through record life cycle. Are there legal constraints or regulations to consider? Most important, how do the staff work today, how do they want to work, and what would an ideal system do?

Will the system take compliance requirements into consideration? A variety of legislative, legal, and internal mandates can impact how records are managed—and different government agencies have different compliance mandates (Figure 1). But you don't need to become the resident compliance expert. Seek assistance from an outside resource, such as a certified records manager or a professional association for records professionals like ARMA International, to identify the compliance issues that matter to your agencies so you can ensure that any system you select helps you stay in compliance.

Will the system work with the existing

Figure 1. Be sure the system you choose will help you put the pieces of compliance together.



All diagrams and the checklist courtesy of Smead Manufacturing.

technology environment? Because you'll ultimately be implementing a technology solution, it's important to understand how it will impact your local government's existing technology infrastructure. Again, that doesn't mean you need to be a technology expert.

Simply engage your information technology (IT) team or the people directly involved in implementing and then maintaining the system you choose to deploy. If you don't have an internal IT team or if the IT staff cannot to support you, be sure to research the professional services capabilities and tech support resources of your top vendors to ensure they can provide the IT assistance you require.

What's the bottom line on costs vs. benefits?

Leave no stone unturned when it comes to identifying both the costs and the savings when you consider a new system (Figure 2). The total cost of ownership is much more than the software and hardware costs. It can also include implementation, maintenance, and administrative and training costs. It's also important to identify the agencies or departments that will incur the cost of a new system, and engage them in the decision.

In the end, though, the biggest cost may have nothing to do with technology itself—it may be the price your organization has to pay for being noncompliant and not meeting mandates. That can have a dramatic impact, not only financially but also to your organization's operations and reputation.

The cost savings or efficiencies gained over the lifetime of the system are equally important: consider everything from time and motion efficiencies to lower storage costs. Also, although you need to save the original copies of many paper records, consider opportunities to concurrently save items electronically, thus leveraging your technology and reducing costs by tracking electronic and physical records in the same system.

Does the system include the features the city or county needs? Start by developing a thorough checklist that documents and prioritizes the features you know are important, so nothing gets missed (Figure 3). Then conduct some good, old-fashioned research to make sure both the vendors and the products you consider will meet your needs.

Ask, for example, whether records management is a core competency or just a feature set within the vendor's system. Do the vendors you are considering understand the unique considerations of government and your various agencies and offer specific capabilities that address those unique needs? Or is their solution a generic, one-size-fits-all system?

Are the vendors willing and able to work within your existing environment and constraints? What level and quality of service and support do they

Figure 2. Weighing all the costs and the savings will give you a complete financial picture.



Figure 3. Develop a checklist of what you need so nothing is missed.

Checklist: Does the system provide?		
Features	Yes	No
Document imaging and electronic tracking		
Paper file tracking		
PC file management		
Property and evidence room management		
Document routing and reporting workflows		
Paper and electronic versioning		
Paper and electronic audit trail		
Web access to information		
Multiple retention schedule management		
Automatic generation of barcodes for tracking		
Barcode tracking		
Processing history report		
Pipeline report		
Retention reports		
Missing documents report		
Productivity report		
File history report		
Compliance report		
Requestor exceptions report		
Audit reports		
Instant location of hard copy records		
Remote scanning capability		
Chain of custody capability		
Applies barcodes and color-codes on one easy-to-apply label strip		
Creates of alphabetic, numeric, or custom index filing systems		
Integrates color-labeled folders with existing files with a perfect color match		
Generate new labels automatically with information from host database or keyboard		
Vendor can create conversion plans		
Vendor can provide file strategy consultation		
Vendor can provide file-to-file conversions and data input into physical and electronic records management system		
Vendor supports unique requirements for physical and electronic records management		
Vendor has a long history and large install RMS user base among government organizations		
Offers Property and Evidence tracking module		
Offers Case File Management tracking module		
Can be easily customized		

provide? Check their history too; look carefully at the financial and organizational stability of the vendors to ensure the firm you select will be with you for the long haul.

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Ethics Matter!

The Two Faces of Social Media

WHEN WE SPEAK, IS IT PERSONAL OPINION OR OFFICIAL POSITION? AND HOW COULD ANYONE TELL?

The infiltration of social media into our personal lives and workplaces is creating some interesting ethical issues for local government organizations. Organizations have always had an overriding interest in and an expectation of controlling who speaks and what's said on behalf of the organization. Social media networks now make for quick communication to an exponentially large audience but often without that distinct line between personal opinion and official position. It's highly likely that you will encounter one of these situations.

Q. The city manager learned that a library employee started a Facebook page promoting the idea of a new library for the city. This news surfaced after a councilmember was asked to be a "fan" of the page. The manager checked the site and discovered that the employee was indeed listed as the administrator of the page. It was not clear from the information posted whether the employee had direction or approval of the library board to set up the site.

The manager was uncomfortable with a city entity or employee promoting the development of a new facility without engagement with the city council, and he sought advice about how to proceed. Should he order the employee to take down the site?

A. Regardless of whether it is via a blog, Facebook, or the now seemingly archaic letter to the editor, all employees have a First Amendment right to comment, after hours and on their own equipment, about city matters. Even though this might create discomfort at the leadership level, the activity cannot be banned outright.

Probably a wise approach would be to talk with the employee about the importance of staff working in concert with the leadership on projects rather than running a solo effort, and that is what the manager in this case did. If the library staff person is really interested in helping the cause, she might be willing to take the site down and rethink her strategy.

Upon reflection and after a conversation with the manager, the employee decided it was best to turn the task of administering the site over to a member of the local "friends of the library," especially since the effort would have mandated that she stay on top of the site during work hours. She continues to be a proponent of a new library but on her own time.

Would the manager take a different tack if the employee in question was the library director? Certainly. Management personnel represent the organization, and when they speak, their comments should reflect the official position of the agency. It would be inappropriate for the library director to promote a concept that had not been vetted with the city manager and governing body.

Social media sites, when branded with city logos or authored by staff, are an extension of the local government's information network. For that reason, the organization has a vested interest in making sure that the information presented represents its official position.

Q. The human resources (HR) director received a packet of information from an anonymous source containing blog entries allegedly written by the assistant city manager. Using a catchy pseudonym, the author commented on news articles and other postings ranging from foreign policy to cultural issues of the day. None of the postings related to city matters.

As she read through the entries, the HR director was startled by the blunt, direct, and at least in her assessment, rude comments made by this individual. If these entries were indeed the work of the assistant city manager and his identity was revealed, it would not reflect well on the city. But since none of the entries was related to city matters, should the

HR director pursue this?

A. The ICMA Committee on Professional Conduct had the opportunity recently to weigh in on a similar scenario. The committee noted that Tenet 7 of the ICMA Code of Ethics gives members the leeway to voice their opinions on policy matters or on issues of the day. If the policy matter relates to the ICMA member’s workplace, the member ought to carefully consider the impact of expressing a personal opinion although the member is still free to do so.

With regard to blogging about nonemployer situations, the committee offered members this guidance:

- Use of a pseudonym is OK, but be cognizant that anonymity is never guaranteed.
- It is not appropriate to use municipal networks to express personal opinions.
- Don’t leverage your position or use your title.
- Think carefully about how comments or views may reflect on your ability to perform, your organization, your profession, and your professionalism.
- Consider the principles of Tenet 3 of the ICMA Code of Ethics, which encourage members to conduct themselves in all professional and personal matters in a manner that promotes public confidence in the profession.

Cities and counties are just now starting to develop policies to provide guidance on the official use of social media, and many readily acknowledge that what appears to be personal communication can bleed over into the work world. For that reason, some organizations ask employees to omit references to their place of employment or their job titles on personal sites.

Other communities are more liberal in allowing references to work and accomplishments but with the caveat that all content should be consistent with the organization’s values and professional standards. They make it clear that if the writer does not follow those guidelines, it could affect future advancement and employment. Blog and twitter away ... please just be civil and clear whether you are expressing a personal opinion or speaking on behalf of the organization you serve.

Martha Perego
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Ethics advice is a popular service provided to ICMA members. The ICMA Executive Board members who serve on the Committee on Professional Conduct review the inquiries and advice published in PM magazine. ICMA members who have questions about their obligations under the ICMA Code of Ethics are encouraged to call Martha Perego at 202/962-3668 or Elizabeth Kellar at 202/962-3611.

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Partners in Greening

Dubuque, Iowa—a recognized national leader in sustainability—has partnered with IBM to deliver such vital services as energy and water management and transportation, all while reducing environmental impact. This Smarter City Initiative will accomplish its goals by engaging local businesses and using such technologies as leak-seeking water meters.

icma.org/smartercitydubuque

Budgeting in the New Economy

The Pennsylvania State Association of Boroughs discusses a tough truth of the recession: less consumer spending will lead to municipalities receiving lower tax revenues for the foreseeable future.

icma.org/pennsylvaniataxrevenues

Learning from Worldwide Data

Thanks to the expertise and experience of its Center for Performance Measurement, ICMA has been invited to serve on the advisory board for the Global City Indicators Facility, a worldwide program that allows cities and other subnational governments to compare their performances according to a set of established indicators.

icma.org/globalcityindicators

Practice Makes Top Performers

Many jurisdictions struggle to engage community members in ways that produce reasonable discussion and compromise. Hone your skills in this area through deliberate practice, as described in Geoff Colvin's book, *Talent Is Overrated: What Really Separates World-Class Performers from Everybody Else*.

icma.org/topperformers

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Your Replies

An Overhaul in the Making?

The March *PM* cover story, "Retooling Property Taxes," was intriguing and reports good outside-the-envelope thinking. Statutes in most states, however, would not allow such "retooling." With this said, revisions as those reported by the article just might be the start of a much-needed massive overhaul of such limiting laws. We all should so advocate.

One American city has applied Henry George's single-tax theory (in other words, tax land only), and this is Fairhope, Alabama. Through personal examination, I have seen the theory as applied there since 1880 working well.

One outside-the-envelope effort I once attempted while a city manager was stymied by a county assessor, who cited statutory limitations that the city attorney could not verify. However, suing an elected Los Angeles County official to secure a major tax system overhaul simply was not politically practical.

The city for which I worked had achieved a high level of computerization through federal grants. We had the capacity, personnel, and desire to innovate. Our attempt at "retooling property taxes" indicated major improvement and public acceptance, but it was stopped cold by a threat of turf war.

Our proposed system broke out the city's portion of the commonly used county consolidated property tax bill. In most states, however, all jurisdictions in the county determine their property tax rate and provide that data to the elected county assessor, who then converts it into revenue via the elected county treasurer.

The payer of the property tax then is presented with an annual bill for ALL jurisdictions—schools, county, community colleges, public hospitals, storm drainage districts, special improvement assessments, the city, ad nauseam—line by unintelligible line. The "benevolent" government then grants the taxpayer the privilege of paying the resultant frightening astronomical amount in two semiannual payments.

Or the mortgage servicer is allowed to add the amount to the monthly payment. A hidden fee is charged for that monthly service while the servicer collects interest. The historic goal of that consolidated type of billing was simplicity, but by 18th-century standards.

Our city alternative was far simpler. We had a fully developed, extant system that identified and costed all city services, including the major "general government" activities of:

- Police protection.
- Fire protection.
- Street maintenance.
- Parks maintenance.
- Recreation programs.
- Libraries.

Each service cost center included overhead, personnel, and fringe benefit charges, fixed-asset replacement, and all total allied expenses. All property tax monies were allocated to the six "general government" activities, but in monthly amounts. All other city services were 100 percent fee financed or supported by specific subventions or other non-property tax sources.

The results were startling. For the average home, police protection was around \$20 per month, fire protection the same, and libraries less than \$5 per month. All others were less. The average city monthly total cost per single-family residence for ALL services was around \$50 per month. These amounts are from several years ago, thus currently they would be higher. However, the principal result of city financial clarity and significantly better informed taxpayers would result. That we heavily publicized the conversion effort and its expected results was applauded.

A complication would have to be resolved were this system to be implemented: namely, collection of delinquencies. In the above-cited specific case, the effort was stymied by the county assessor refusing to provide the city with the computer tapes containing assessed values.

It is encouraging to see such innovations being undertaken as reported in the article. I would hope, however, that professional local government managers, finance directors, and information technology personnel would be in the forefront of this effort, not elected mayors. In so doing, elected officials are defying their political odds by so stepping up. One also could have suspicions about the selection of those property categories that receive major tax reductions via the "retooling."

Douglas Ayres, Retired Manager, and now resident of Sedona, Arizona (dougsedona@esedona.net).

Working Smarter

The March issue of *PM* (page 27) included this Call for Contributions: "Does Working Better Mean Working Less?" Here is the first reply that was received at press time:

CRUSH DOWN THE STRESS

I have found over the years that it's about keeping your perspective, having clear goals and objectives, and showing leadership by example, which means using leave credits annually and strategically to keep yourself energized and fresh and, most important, staying fit and healthy. As I write this, I start each day (with occasional breaks for snow shoveling – we have real winter weather in western New York State) by walking and running while most others are still sleeping in the communities in which I've lived. This habit goes back to my competitive days in high school and college.

Mentally and physically, my day then starts out on a natural high, and my undistracted thoughts are part of my positive approach to the rest of the day. My work ethic has always been extremely good, and productivity and creativity are enhanced by the proper balance of mental and physical health, which makes for less stress despite the actions or notions of those around you sometimes. It always means less need for burning the candle at both ends, although occasionally around budget season that's needed, and still I feel I have ample time for family, friends, and extracurricular activities and downtime.

As they say, it's not about working longer or harder, it's about working smarter, delegating, using teamwork and collaboration aligned with clear-cut goals and objectives, and appropriate praise and thanks to encourage others to aspire and achieve success in what is often considered the mundane world of local government and public service. The old saying, "All work and no play makes 'Jay' a dull boy," applies. During my 35 years of public sector administration and management service, I can attest to the wisdom of these words.

Jay Gsell, ICMA-CM, County Manager Genesee County, New York (jgsell@co.genesee.ny.us).

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Balancing Act

Revisiting the Forgotten Third Element: Self Part 1 of 3

"From everyone to whom much has been given, much will be required."
— Luke 12:48

As a public manager, you have a significant amount of power and influence, and your actions will determine to a great extent the outcomes in your organization. You may not always feel that these statements are true, especially on the days when you feel as if you can't get anything done. But reread them. In the minds of the majority of your coworkers, from the members of your community's governing board to your larger community of residents, the statements are true.

How do you find balance given this responsibility? During the course of the past several months, this column has discussed the pressure your work can place on your personal balance. The intrusion of electronics, the challenge of dual-career families, and the role of the Internet were addressed specifically. In each case, the focus was on the interplay of time demands or family needs. In all the preceding columns was one constant: you, the public manager.

In the original model that began this series of columns last September, I discussed the competing worlds of *work*, *family*, and *self*. Often overlooked in the course of a week or month, the *self* can become lost. It can also be lost in superficial solutions like a day at the spa or a trip to an exciting place like Las Vegas. These getaways are rejuvenating, but they may not help you see who you are.

They don't help you remember where you started; neither do they help you understand how that person relates to where you want to be. They also do not remind you of all the power and responsibility you wield. For this reason, in the next three columns, I will focus on you, your *self*, the third element in the pursuit of balance.

As you move through your professional career, you will have opportunities to stop and appreciate the work you've done. Your name will be recorded in remembrance of your work and your role, perhaps connected to new government buildings, programs, or memorials. As people are hired and promoted into the organization, they will think about you as an extension of their own welfare. What does it mean now? What will it mean in the future? Perhaps more than anywhere else, the source of your ability to maintain balance will come from your sense of who you are.

One of my colleagues, Harry Kraemer, teaches a leadership course at Northwestern University's Kellogg School of Management. This is one of the top graduate management education programs in the United States. The students are bright, motivated, high achievers—they are elite. Teaching leadership there is only for someone with the courage to engage with students who arrive with high expectations; in fact, many of them have already proven to be leaders.

Harry has experience and a method to meet their expectations. He was the chief financial officer and then the chief executive officer at Baxter International, a hospital products company. (I have always considered the public manager position similar to a CEO, as both roles report not to one person but to a board.)

Every year, Harry also protects some of his time for reflection and introspection. You may be curious about how he does this in an extremely competitive academic and business environment.

Harry challenges his students in a unique way: he asks them to journal. Once a week, they are required to write about themselves and to turn in their thoughts. He does not grade the entries, but he does insist they are completed.

During the course of several weeks, as his program unfolds, he tells me he almost always sees a profound change in the students' entries. From a guarded and relatively superficial tone, they move steadily to becoming more profound and meaningful.

Personal questions are asked about their career paths, getting an MBA, how various people in their lives are important, and for whom and what reasons are they getting their degrees. By the end of the class, many students comment that this writing was perhaps as powerful or even more so than the course content and dialogue with other CEOs and leaders.

As I prepared to use the concept of power and responsibility to begin this column, I started with a quotation from the 2002 movie, *Spider-Man*. I found a number of versions of the quote, and here are two popular ones:

- "With great power comes great responsibility." Uncle Ben
- Or the original, comic-book quotation: "With great power, there must also come great responsibility!"

The reference from the Bible had a more serious tone. That was my choice. Yours might be different. Your choice will depend on who you are and what's important. Discovering what is important and who you are will come from reflection and exploration. Journaling or other similar activities can help you in your quest for knowledge of *self*.

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Healthy Communities

The Healthy Makeover

Turning brownfields into greens and greenfields

In 2001, while Lynchburg, Virginia, was renovating its local baseball stadium, the Parks and Recreation Department was looking for a park site in the nearby Fort Hill neighborhood, which was underserved by recreational facilities. Staff identified two blighted parcels adjoining the stadium. They viewed the fact that both were brownfields as an opportunity to transform them from a health risk into a healthy destination.

In 2003, the city used its power of eminent domain to claim the larger, 16.9-acre property—known as the Allen-Morrison property—for its new park. The property had been in industrial use since the early 1900s, but crumbling structures were all that remained from that era. It had at times been home to a farm wagon manufacturer, a metal sign-making plant, a chemical company, and a veneer factory.

That same year, a new nonprofit organization called Lynchburg Grows purchased the second property, which lies between the future park site and the stadium. The 6.5-acre site had once been used to cultivate roses and was still home to nine brick greenhouses and other buildings. Lynchburg Grows wanted to turn the existing facilities into an urban farm and education center.

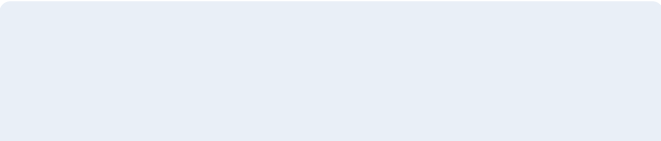


The Fort Hill neighborhood of Lynchburg, Virginia, is home to a cluster of attractive destinations: a future park (Allen-Morrison property), an urban farm and education center, and a city stadium.

Lynchburg Grows and the city simultaneously applied to the state's voluntary remediation program for their respective properties, and both were accepted. Through the parks and recreation department partnering with the engineering department, the city took the lead on redeveloping the two brownfields sites—with little initial success. "I had no idea what a brownfield was," admits parks and recreation director, Kay Frazier. It wasn't just Frazier—no one in the city had experience guiding properties through the complex brownfields remediation process.

Then, after several years of playing catch-up on federal and state brownfields procedures, the city successfully put the two adjoining properties through the Virginia Department of Environmental Quality Voluntary Remediation Program, which funded the environmental assessment. Other city departments have since started collaborating to advance the initiative. "We'll be sending a cross-departmental group to the next national brownfields conference, representing engineering, planning, and economic development," notes Frazier.

The next phase of the park's development will focus on the demolition of some buildings and the deconstruction of others in order to minimize the amount of usable materials dumped in the landfill. The former Allen-



Morrison property, selected as one of 16 EPA Brownfields Sustainability Pilots in 2008, received federal funding to create the hybrid plan.

Lynchburg expects to use the salvaged materials in public and private construction projects citywide as well as in the design of on-site park elements, like benches, to inform visitors about the park's industrial past. The city will measure its success by documenting how much material is diverted from landfills in favor of recycling or reuse. Lynchburg also hopes to measure the economic value of its choice to deconstruct some of the buildings rather than demolish them all.

Lynchburg Grows has introduced a broad range of health-oriented activities on its property since 2003. The organization grows roses and organic produce and offers nutrition and food systems programs for children, gardening workshops for adults, and vocational training for people with disabilities and at-risk youth. It also hosts monthly workshops such as yoga classes, which are sponsored by the city.

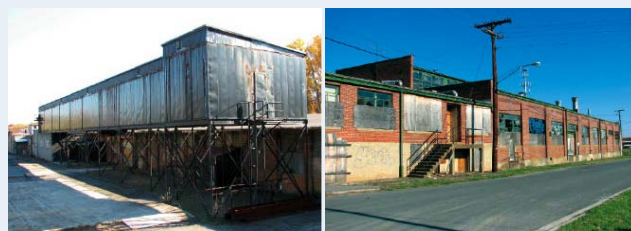
Next door, the city's preliminary plans for the park include playing fields and playgrounds, a community center with an indoor gym, picnic areas, and pedestrian access to Lynchburg Grows and the nearby stadium. To supplement the idea of physical activity at the park and healthy nutrition at Lynchburg Grows, the city also wants to facilitate active transportation to the area.

It is examining how to link sidewalks and bikeways at the park to Lynchburg's impressive urban trail system, which includes more than 30 miles of paved routes and mountain-bike trails and is part of the regional James River Trail system. The park will also increase tree canopy and green space and use other green management strategies like green roofs and rain gardens for stormwater management. The next phase is to engage community residents for more detailed discussions.

Although health and sustainability have been part of the city's discussion all along, they were not recognized as major city goals until recently. When the city project is complete, Lynchburg will have transformed two blighted properties into an attractive and sustainably managed destination for residents of Fort Hill and the region. Residents will be able to enjoy active recreation, active transportation, and healthy nutrition in or close to the new City Stadium Park.



Buildings on the former Allen-Morrison property in Lynchburg, Virginia, are scheduled for demolition or deconstruction in 2010. Metals will be recycled, and bricks and timbers salvaged for reuse. One metal building will be reused by the city for storage.



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