

ICMA Executive Director's Report

September 2009

As of June 2009, ICMA had 9,195 members, including 8,805 in the U.S. and 390 internationally. Of the total membership, 6,566 worked for local government and 138 were in transition. 1,316 new members joined in FY2009; 1,247 members dropped voluntarily or were suspended for nonpayment of dues during this time period.

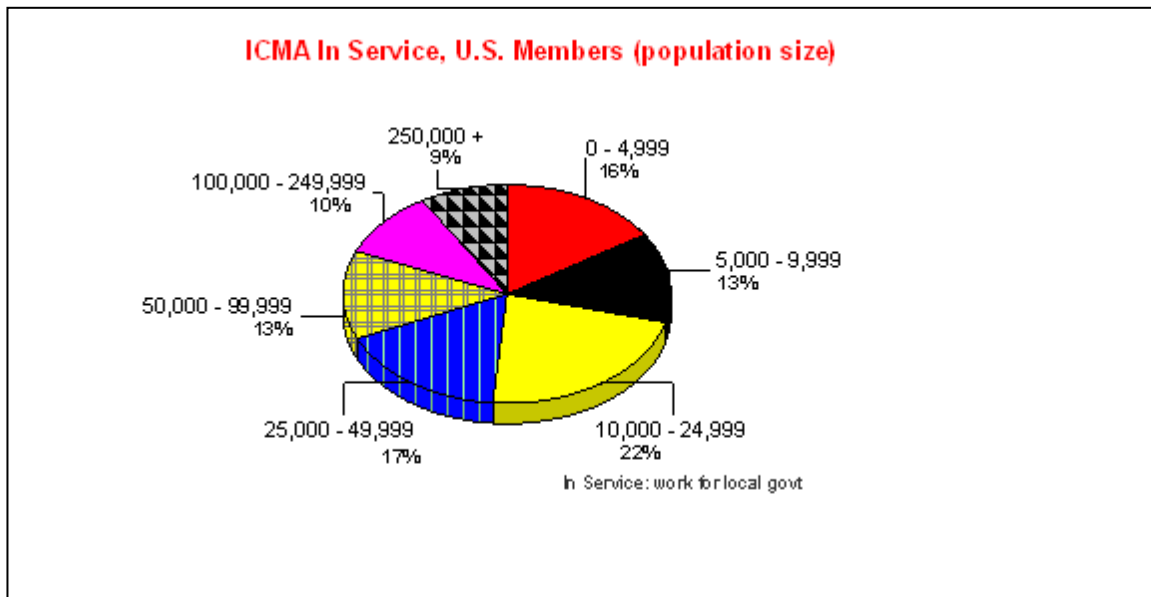
Membership Recruitment & Retention

- Achieved a 90.8% average retention rate of U.S. in-service members, with an overall U.S. retention rate of 83.3%.
 - Developed partnerships with state associations in Virginia, North Carolina, Texas, Tennessee, and Illinois to recruit new members.
 - Implemented a policy offering a one-year complimentary ICMA membership to any student receiving a scholarship through his or her state association. Membership offers were extended to students in Kansas, New Hampshire, South Carolina, and Texas. As of June 30, students in both New Hampshire and Texas had joined ICMA as a result of this offer.
 - Launched an initiative to increase the number of young professionals joining ICMA, which included promotion of new Affiliate flat dues rates for entry to mid-level local government staff for their first three years of membership: \$150 for the first year, \$175 for the second, and \$200 the third year before shifting to the salary-based Affiliate dues the fourth year. As of the end of June, 168 members had joined in that category.
 - Redesigned the "Join ICMA" section of ICMA's web using photography and messaging from the next gen membership campaign to bring stories of how membership can help local government managers at any career stage accomplish their goals.
- Promoted the next gen campaign throughout FY2009, including ads, articles, presence at conferences, and other efforts to raise awareness among key staff, senior advisors, Legacy Leaders, and known "champions" of next gen initiatives.
 - Promoted the Legacy Leader Program recognizing Credentialed Managers who actively coach and recruit young professionals. By year end, 27 Legacy Leaders and 87 Legacy Leader candidates were participating. Honored Legacy Leaders at the 2008 ICMA conference and in various communication vehicles during the year. Held a session on coaching the next generation at the 2008 ICMA conference, providing a forum for mentors to share success stories, strategies, and experiences.
 - Continued extending complimentary one-year memberships to nonmember participants in the University of Virginia's LEAD program, the Young Professionals' Leadership Institute, ICMA's Emerging Leaders Development Program, and nonmember young professionals in Center for Performance Measurement jurisdictions.
 - Developed a national recruitment program to target newly appointed CAOs, especially those in communities with former member managers. In four months, 97 potential Full members were contacted and 13 were recruited, accounting for nearly 15 percent of new Full members during that time.
 - Extended the recruitment effort to interim and acting managers through e-mail outreach. One acting manager joined; another was appointed and later joined as a Full member.
 - Supported Executive Board members in their commitment to recruit and retain members in their own

states/countries where they have the most knowledge and contacts.

- Received strong ratings from a member survey in June: nearly 90%

rated ICMA's customer service in general as excellent or good, and more than 86% rated the value of ICMA membership as excellent or good.



Member Services

Economic Crisis Support

- Launched a new Web page providing members with resources for difficult times. Posted the new report *Navigating the Fiscal Crisis: Tested Strategies for Local Government Leaders*, the version for elected officials, and a video of a presentation on the paper from a regional summit.
- Through ICMA Consulting Services, offered a free mini-consulting session with a financial crisis expert.
- Piloted ICMA Ideas & Solutions Roundtables, free 60-minute teleconferences for groups of members to network and exchange ideas on timely topics, starting with the economic crisis.
- Helped members maintain their memberships by allowing them to pay dues in quarterly installments and provided some dues "breaks" to Affiliates.
- Offered a new "virtual" Economic Crisis E-Debit Card for Full and Affiliate members currently serving in U.S. local governments. Full members have

a \$200 credit and Affiliate members have \$100 to use anytime over the next two years on ICMA membership dues and professional development programs.

Awards

- Conferred three professional and ten program excellence awards; recognized recipients at the Richmond conference and in a *PM* magazine insert.
- Made a special appeal through the international affiliates to promote interest in the awards program and encourage them to submit their awards program recipients as nominees.
- Solicited 133 eligible nominations for the 2009 Annual Awards program.

Range Riders/Personal Support

- Eighty-six Range Riders in 23 states are available to provide support to members and to promote the council-manager form of government.
- Developed an interview "tip sheet" for members.

- Maintained monthly conference calls for members in transition, moderated by Range Riders and ICMA staff, addressing topics proposed by participants with frequent guest speakers.
- Engaged in membership development activities focused on outreach to newly appointed nonmembers.

Member Operations

- Responded to 96.3% e-mails sent to membership@icma.org within 24 hours.
- Provided complimentary benefits to 138 members in transition (MITs), including monthly conference calls, and assisted state associations with their support programs by maintaining a clearinghouse of state MIT activities and periodically sending suggestions from MITs. Achieved a satisfaction rating of 92%, according to a survey completed by 64 members in transition.
- Presented service awards to 778 members and gave special recognition at the Richmond conference to one 50-year and two 45-year recipients. Achieved a satisfaction rate of 94% on a survey completed by 107 service award recipients--a dramatic increase over last year's satisfaction rate that can be attributed to an overhaul of the conference ceremony based on member suggestions.
- Encouraged networking by maintaining current contact information on members that includes their education and employment histories.
- Received expressions of interest from 149 members to serve on member committees (Conference Planning, Conference Evaluation, International, Governmental Affairs, and Awards Evaluation Panel) and four new task forces to welcome new members and to review career resources (*First-Time Administrators' Handbook*, *Local Government Management: It's the Career for You*, and *Recruitment Guidelines Handbook*).

ICMA Newsletter

- *ICMA Newsletter* continues to be the most highly rated member benefit according to the results of the 2009 membership survey.
- Created an e-version of the *ICMA Newsletter*, which premiered September 2008. Encouraged members to opt out of the print version as part of the rollout.
- Developed and implemented a PR campaign to prepare members for the elimination of the print version in August 2009.

Ethics Awareness and Enforcement

- Issued one public censure with a membership expulsion and credential revocation; one public censure with a membership expulsion; one public censure with a membership bar; five public censures; 10 private censures; closed five cases.
- Assisted six fact-finding committees in California, Florida (3), Kansas, and New Hampshire.
- Responded to 160 ethics inquiries; publicized ethics issues in 11 issues of *PM* magazine, and published in the *ICMA Newsletter* the results of 12 cases involving allegations of unethical conduct by members.
- Presented ethics workshops and presentations at 14 conferences sponsored by state associations, affiliate organizations, national associations, and graduate schools.
- In conjunction with ILCMA leadership, presented expert testimony to the Illinois Reform Commission.

Credentialing

- Granted the ICMA Credential or Candidate status to 123 additional members, for a total of 1,168.
- Achieved a renewal rate of 95%, with 95% of renewals completed online.
- Continued to offer and improve an online system that enables Credentialed Managers to track their professional development activities and submit annual updates.

Relationship Management

State Liaison

- Maintained communications, support, and deployment of 12 senior advisors representing ICMA in 13 states plus GOSCMA; continued evaluation of the program; and renewed agreements through 2010.
- Held four regional summits, expanding the Young Professionals Leadership Institute (YPLI) to all four events. Built on successful formats from FY2006 through FY2008, including an ICMA University workshop led by Bob O'Neill. Received favorable rankings and positive feedback on evaluation surveys.
- Provided ICMA representation (by state liaison, executive director, vice presidents, and/or ICMA president) at meetings of 97% of state associations. Forty-one associations met during the year with an ICMA representative present at 40 of them.
- Provided ICMA programs at meetings of 49% of state associations.
- Developed and disseminated a template for formal affiliation agreements with state associations; initiated discussions with state leadership and negotiations to tailor each agreement for measurable, collaborative efforts on strategic plan priority areas.
- Provided ICMA staff support during the sixth year of Cal-ICMA (the consortium of city manager, assistant, county, COG, and other groups of local government management professionals in California, which serves as the official ICMA affiliate in the state). Provided support to emerging Cal-ICMA affiliate, Women Leading Government (WLG). Created Web presence on the icma.org platform and established the WLG communications forum/list serve.
- Prepared and distributed three issues of *StateSide* for state association leadership.
- Continued to serve as secretariat to the Maryland City/County Management Association.

Affiliate Relationships

- Maintained liaison with the leadership of the International Hispanic Network (IHN) and supported the effort to renew the IHN/ICMA affiliation agreement in May 2009; provided information for the IHN Web site and e-news mailings, conference support, and other outreach.
- Sent staff liaison to the National Forum for Black Public Administrators (NFBPA) board meetings and annual conference in Oakland, California; scheduled former ICMA West Coast director for a workshop presentation; ICMA's NFBPA liaison presented an Ethics Court session with ICMA ethics staff. Dialogue regarding Memorandum of Understanding with NFBPA is ongoing.
- Developed and monitored work plan resulting from the Task Force on Diversity in Governance. Focused on messages to IHN and NFBPA members regarding participation on ICMA Nominating Committee, engagement in ICMA board elections process, and participation on ICMA member committees. Worked with IHN and NFBPA to identify topics and members to participate as panelists and moderators at ICMA Annual Conference.
- Published and delivered five issues of the National Association of County Administrators (NACA) *Journal of County Administration* in both print and electronic formats; provided secretariat services.
- Worked with the Japan Local Government Center to identify an ICMA member to participate in the 2009 CLAIR Fellowship Exchange Program study tour to Japan.
- Worked with the New Zealand Society of Local Government Managers to arrange a match for one member as part of the International Management Exchange Program.

Career Services

- Recruited nine local governments to host 13 new Local Government

Management Fellowship program fellows beginning in late summer-early fall 2009.

- Held sessions and social activities targeted toward early careerists at the Richmond conference, including “speed coaching,” a NextGen Lounge, a “generations mixer” and a coaching session for Legacy Leaders. Provided financial assistance to 13 women and minorities and individuals beginning or considering careers in local government to attend the Richmond conference.
- Improved the functionality of the ICMA JobCenter and added comment and feedback forms.
- Redesigned and converted the *JOB* newsletter to an e-newsletter.
- Merged the JobCenter and Next Generation Web sites to take advantage of exposure, news and calendar presence, and other internal tools.
- Launched a Web2 strategy to coordinate ICMA presence on YouTube, Flickr, Twitter, Facebook, and LinkedIn.
- Started a “Featured Job” for posting on Career Network home page to add value to the advertiser and promote the *JOB* newsletter; launched a monthly Career Compass column.
- Launched the second annual ICMA Video Contest generating seven new career and local government marketing videos.
- Conducted a succession planning member survey and an Alliance feature article.

ICMA BRAND AND ADVOCACY FOR THE PROFESSION

Public Information

- Responded in a timely manner to 60 media inquiries on form of government and general management issues.
- Launched a toolkit of resources for Public Service Recognition Week (PSRW); coordinated ICMA’s participation as exhibitor in PSRW event on the Mall in Washington, DC;

promoted PSRW on the Web site and in *Local Government Matters*.

- Coordinated Executive Board participation in a half-day celebration recognizing the 100th anniversary of the first general management plan (in Staunton, Virginia) in conjunction with the Richmond conference. Coordinated Board member participation, plaque, and publicity for El Paso’s five-year anniversary.
- Worked with a PR firm to coordinate telephonic press conferences on immigration reform. Generated significant media impressions and local media coverage. Worked with Alliance staff to coordinate telephonic press conference on “Navigating the Fiscal Crisis,” which resulted in media coverage in several vehicles, including MarketWatch.com.

Form of Government and the Fund

- Increased the number of contributors to the Fund for Professional Management from 632 in 2007 to 802 in 2008; dollar contributions increased from \$156,422 in FY2008 to \$187,730 in FY2009 (the corpus is \$1.1 million).
- Provided financial contributions to organizations in Hillsborough County, Florida; Sarasota, Florida; Danville, Kentucky; Randolph, Massachusetts; and Bainbridge Island, Washington, all of which successfully adopted or retained the council-manager form of government. Contributed to Freeport, Illinois, where efforts to adopt the form of government were unsuccessful, and to non-ballot issues in Annapolis, Maryland, and Buffalo, New York.
- Provided tailored assistance to communities seeking to adopt or retain council-manager government by offering literature, advice, and other resources.

Public Policy

- Published white paper, *Immigration: A Local Government Perspective*, held 2008 conference session on topic, and participated in news event in January

2009; published hot topic white paper on *Local Government's Vital Role in National Economic Recovery* and presented to Obama Transition Team.

- Provided policy recommendations on networked approach in National Homeland Security Consortium transition letter and in other communications with the new DHS/FEMA teams.
- Wrote chapter for *Getting It Done: A Guide for Government Executives* by the IBM Center for the Business of Government.
- Participated in Big 7 federalism event in Philadelphia; signed onto letters with Big 7 partners on such issues as the economic recovery/stimulus package and 3% withholding. Signed onto seven amicus briefs filed by the State and Local Legal Center.
- Supported two meetings of the Governmental Affairs and Policy Committee. Ensured ICMA leadership and member participation in meetings with OMB, DHS, IBTS, NAPA, GASB, GASAC, Advisory Commission on Performance Management, among others. Member Ron Carlee elected as vice chair of National Homeland Security Consortium.

Marketing and Communications

- Conducted a nationwide search and retained GMMB—one of the top creative agencies in the nation—to develop the creative and media strategies for a campaign to build awareness of the value of the profession.
- Generated more than 120 million media impressions due to publicity efforts, including the release of white papers on the fiscal crisis and immigration.
- Coordinated ICMA participation in a total of 25 domestic and international events with more than 80,000 attendees.
- Achieved high “open” rates for and increased circulation of newsletters—*Local Government Matters*,

Performance Matters, and *Academic Matters*. Developed new approach for icma.org Web site, which will be launched in October.

- Increased the size of ICMA’s e-mail database with more than 8,000 new addresses to better reach potential funders, elected officials, the academic community, and prospective members.
- Continued to expand ICMA content capabilities by adding more video segments through ICMA tv, produced a new Leading Ideas Series DVD with Peter Block, and introduced a podcast program.
- Kicked off a customer relationship management campaign for domestic and international funding targets that demonstrates the value ICMA can bring as a partner.

PROFESSIONAL DEVELOPMENT

Annual Conference

- Planned and implemented the 2008 Annual Conference in Richmond, Virginia, which received an overall rating of “very good” or “excellent” from 66.4% of evaluation survey respondents.
- Exceeded revenue goals by 6.5%, in part because of stronger than anticipated attendance (total attendance was 3,244; member attendance was 2,155).
- Received positive satisfaction ratings from 95.2% of exhibitors who responded to the exhibitor evaluation survey.

ICMA University

Annual Leadership Institutes

- Twenty Credentialed Managers and two Leadership ICMA graduates participated in the ICMA Gettysburg Leadership Institute.
- Welcomed 9 senior executives and 15 Leadership ICMA participants to the ICMA SEI Leadership Institute.

Workshops

- Offered 19 ICMA University workshops at the Richmond conference.

- Partnered with state associations or affiliates to offer an additional 22 workshops.
- Maintained an evaluation average of 4.4 on a 5.0 scale for workshops. Offered workshops to a total of 140 paid participants at four regional summits, each of which included the ICMA University workshop "A Whole New Mind: Using the Work of Daniel Pink to Move Our Organizations into the Conceptual Age" led by Bob O'Neil and Felicia Logan.
- Partnered with Consulting Services and two states to provide two regional workshops for 54 participants.

Leading Practices

- Offered nonmembers the opportunity to experience ICMA professional development through a Leading Practices Conference titled "The Manager's Role in Moving Your Organization from the Informational to the Conceptual" in Asheville, North Carolina. Case studies presented by Decatur, Georgia; Lynchburg, Virginia; Montgomery, Ohio; and Winchester, Virginia, were also presented as audio conferences for those who could not attend or who attended and wanted staff to benefit from the event.

Local Government Training

- Conducted 12 fee-based programs on ethics for five local governments, one local government consortium, and one professional association; one train-the-trainer session at the Richmond conference; and one Web workshop.
- Produced 27 audio conferences for local government managers and staff.

ICMA Academy for International Development: Courses

- Conducted an online, hour-long introductory orientation session for 12 participants; conducted day-and-a-half fee-based workshop for 8 participants in Richmond in conjunction with the ICMA conference.

INFORMATION

Publishing

- Published *The Municipal Year Book 2009*, which includes two articles of "hot topic" interest: one from ICMA-RC on local government employee retirement in the current economy and one on alternative work schedules.
- Published *Local Planning: Contemporary Principles and Practice*, with contributions from nearly 100 scholars and practitioners. The book won an award for design and composition.
- Published revisions of *Managing Local Government: Cases in Effectiveness*; *Citizen Surveys for Local Government*; and *Leading Your Community: A Guide for Local Elected Leaders* (in partnership with NLC).
- Published the following new titles: *Creating a Culture of Health*, *What Works*, and *Leading Performance Management in Local Government*. *What Works* won an award for overall design.
- Tested repackaging three chapters of *Managing Local Government Services* as electronic-only (downloadable) products (and repositioning these chapters as "What to Tell Your Elected Leaders About . . .").
- Published six IQ Reports and planned for a redesigned report series starting in January 2010.
- Offered 18 books on Amazon.com and ran Google ads.
- Attended NASPAA and APA conferences to promote publications and source new acquisitions.
- With the Survey Research Team, conducted market research (focus groups and surveys) to evaluate new publication series proposal and obtain IQ subscriber feedback.
- Obtained book purchaser feedback indicating an increase in the percentage of buyers who rate their overall impression of their purchased book as "excellent."

PM Magazine

- With the Survey Research Team, conducted focus groups and a survey of *PM* readers and planned a redesign of the magazine.
- Ran nine articles in *PMPlus*—articles that appeared exclusively online and not in the print edition.
- Received 54 requests to reprint *PM* articles, compared with 61 in the previous year.
- Continued to engage members as contributors: 56 members wrote articles for *PM*.
- Logged 80,609 visits to *PM*'s Web site, compared with 72,437 in the previous year.

Survey Research

- Conducted ICMA-funded national surveys of police and fire personnel expenditures and State of the Profession.
- Conducted surveys on a proposed new leadership series, professional development, and *PM* magazine.
- Began design of a new economic development and sustainability survey.

Knowledge Network

- Prepared for the launch of the new Knowledge Network in October 2009. Added more than 550 new content items to the ICMA Resource Center, which will merge into the Knowledge Network.
- Explored partnerships with APA and a Canadian municipal organization.

Alliance for Innovation Partnership

- Finalized an operations agreement, which was approved by the Alliance board.
- Prepared for elected officials a version of the white paper *Navigating the Fiscal Crisis*.

SERVICES

Consulting Services

- Secured 30 contracts with an average value of \$55,000 in public safety and \$75,000 in management services.

- Added a new financial services program to help local governments address the fiscal crisis.
- Helped the International Team secure a major public safety project in Latin America.
- Established a working relationship with International Public Personnel Management Association addressing core competencies of police and fire chiefs.
- Added 14 contract consultants to support projects nationwide, building the network to more than 30 consultants under contract.
- Contributed to ICMA member publications, including *PM* magazine and *Local Government Matters*; conducted multiple audio conferences and regional workshops, including a new series on financial management/budgeting; and provided educational support to ICMA University.

Performance Management

Center for Performance Measurement

- Ended FY2009 with 200 participating jurisdictions, compared with 222 in FY2008.
- Increased the number of state/metro-area consortia from 12 in FY2007 to 17 in FY2009. Conducted dozens of training sessions and facilitated numerous meetings for these consortia.
- Published a book of short case studies, *What Works: Effective Practices from High Performing Local Governments*; the book later received the Society of National Association Publications Silver Award in the "nontechnical book" category.
- Distributed brief dashboards of key measures individualized for each participating jurisdiction, which is intended for managers and administrators.
- Published *Comparative Performance Measurement: FY2007 Data Report* and *Comparative Performance Measurement: FY2008 Mid-Year Data Report*; continued to publish two monthly e-newsletters: *Performance*

*Matters and Performance
Measurement Insider.*

- Continued the successful ICMA graduate assistant/intern program, with MPA students from Arizona State University, George Washington University, University of North Carolina, and University of Colorado, who work with the CPM staff full time for two consecutive summers and part-time during two school years.
- Delivered four ICMA University workshops: two at the Richmond conference, one in Oregon, and one in New Hampshire.

National Citizen Survey

- Through a partnership begun in 2002 with the National Research Center, continued to provide local governments with access to a high-quality, low-cost National Citizen Survey as a means to get feedback from their residents regarding the quality of local government services.
- Served 58 jurisdictions, compared with 62 in FY2008.

International Programs

- Submitted a record number of project proposals to prospective funders, which is expected to diversify the country profile and risk of ICMA's project portfolio; targeted marketing efforts at several new clients and received first-time funding from new international donors and federal agencies; marketed new technical sectors translating ICMA domestic capabilities into the international arena.
- Increased ICMA's presence in the international arena by participating at key local government conferences and maintaining an ongoing dialogue with international donors and other influential organizations.
- Provided ICMA members with opportunities to participate in ICMA international activities, to the great benefit of the program.
- Provided consulting assistance and training in 10 countries: Afghanistan,

Ethiopia, Guatemala, India, Indonesia, Iraq, Jordan, Lebanon, Mexico, and Serbia.

- Continued assistance to local governments through ICMA's CityLinks program, including the following projects:

Afghanistan: Local government and provincial service delivery improvements, including public works and infrastructure development, water services management, financial management, general management and decision making.

Ethiopia: Assisted with a range of local government service issues, including local economic development and emergency management practices.

Jordan: Provided assistance in medical and industrial waste management.

- Provided consulting assistance and training to local governments, officials, staff, and citizens to improve local government performance:

Guatemala: Performance measurement and management.

India: Financial management and service delivery implementation.

Indonesia: Financial management, budgeting, general local government services training.

Iraq: Local government and regional service delivery; citizen participation in local priority setting.

Lebanon: Local economic development and strategic planning in five cities.

Mexico: Management training and development and improvement of performance standards; assistance in improving creditworthiness.

Serbia: Promotion of local economic development.

Domestic Programs

- Through funding from the U.S. Environmental Protection Agency (EPA), developed draft publications focused on rural communities and smart growth, and climate change and smart growth; more than 6,000

individual members are now a part of the Smart Growth Network.

- Managed the Local Government Environmental Assistance Network (LGEAN), a resource for information and tools on environmental management. LGEAN averages 30,000 online user sessions per month, has 4,600 subscribers to its electronic newsletter, and responds to 100 questions a month.
- Secured a new 5-year \$1.2 million contract to manage the national Brownfields Conference in conjunction with EPA.
- Developed a green jobs training program with the city of Portland, Oregon, and a local nonprofit organization.
- Published a new management perspective on mobile workforce management with funding from ICMA strategic partner Runzheimer International.
- Continued to recruit new signatories for the sustainability commitment statement; published a series of PM magazine columns on sustainability.
- Continued partnership with the Robert Wood Johnson Foundation on active living to develop knowledge resources aimed at reducing obesity.
- Supported the implementation of audio conferences on sustainable communities, competing successfully for energy efficiency and conservation block grants, and obtaining economic stimulus funds.
- Collaborated with the National League of Cities to design and deliver emergency management training to elected and appointed local government officials.
- Began phase 2 of National Study of 311 and Customer Service Technology with funding from the Alfred P. Sloan Foundation. A series of 10 projects under the study will provide local governments with new information and resources for developing a centralized customer service system. The final report from phase 1 of the study, released in December 2008, had had

nearly 1,653 downloads as of the end of the fiscal year, making it the top free item downloaded from the ICMA Bookstore.

- Signed a \$976,323 grant agreement with the Bill and Melinda Gates Foundation to administer a two-year program designed to strengthen the relationship between public libraries and local governments by leveraging libraries in support of community priorities. Launched ICMA Public Library Innovations Grants and in five months reviewed 515 applications and awarded more than \$500,000 to nine communities.

Strategic Partnerships

- Received or secured commitments for more than \$2.3 million in support of ICMA programs and activities through strategic partner fees, contributions, grants, joint ventures, and sponsorships.
- Provided five new knowledge resources to the membership through strategic partners: Peter Block DVD funded by ICMA-RC; Management Perspective on employee mobility funded by Runzheimer International; Management Perspective on community building funded by the Annie E. Casey Foundation; Strategic Guide on healthcare funded by CIGNA; and audio conference and guide for local governments on stimulus funding by The Ferguson Group.
- Continued the partnership through which ICMA-RC has made an annual commitment of \$500,000 over a three-year period to help expand ICMA's high-quality professional development and continuing education programs through the ICMA University and annual conference.
- Renewed a partnership through which CIGNA provides \$300,000 in support for annual conference events.
- Engaged strategic partners in key programmatic areas: Brownfields (CH2MHill, ESRI); healthcare and active living (CIGNA, Robert Wood Johnson Foundation); sustainability

(CDM); public libraries (Gates Foundation); community building (Annie E. Casey Foundation); 311 (GovPartner, EMA, Alfred P. Sloan Foundation); Emerging Leaders and Next Generation (NEOGOV); and audio conference (The Ferguson Group, Annie E. Casey Foundation, Sloan Foundation). Ten partners contributed to ICMA publications and e-library; 90% of partners participated in the 2008 annual conference.

HIGH-PERFORMING ORGANIZATION Leadership and Management

- Communicated executive board meeting dates and locations, election processes, agendas, actions, and minutes through the *ICMA Newsletter* and a special section of the Web site; met with state leaders and members in conjunction with board meetings in Plano, Texas; Jacksonville, Florida; and Annapolis, Maryland.
- Adopted 2008 ICMA Strategic Plan in September, engaged the board in November on articulating and prioritizing implementation tactics for each strategy, and developed the FY2010 budget and FY2010-12 financial plan based on the strategies and tactics.

Customer Contact Center

- Handled 12,563 phone calls and 9,961 e-mails; processed 176 "bounced" e-mails.
- Answered 99.3% of all e-mails within 24 hours; answered 91% of incoming phone calls within 20 seconds.
- Implemented project plan to move all order taking tasks from an external fulfillment house to the Customer Contact Center.

Facilities and Administrative Services

- Negotiated competitive rates on all services, including copiers, supplies, etc.
- Subleased all available space in the building generating revenue.

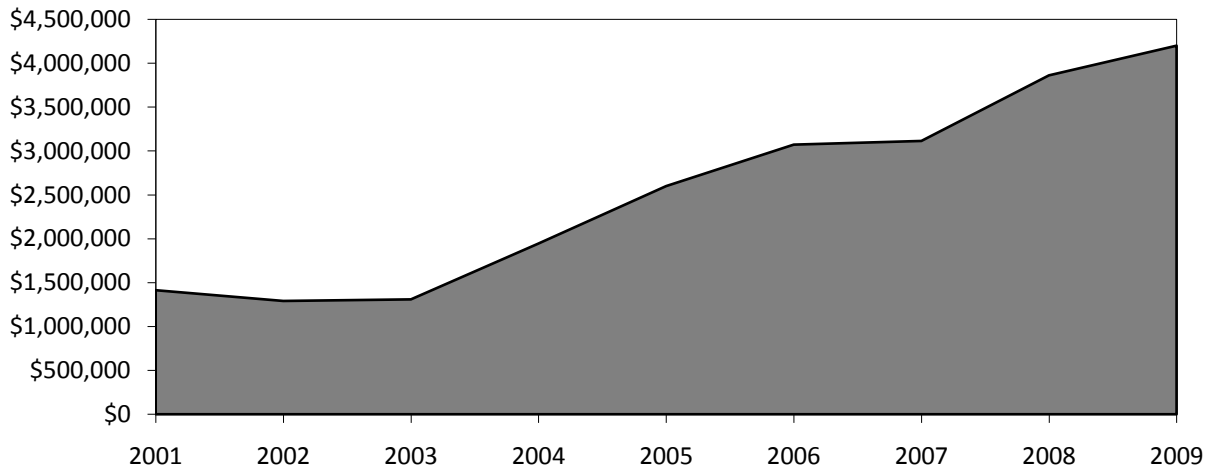
Information Technology

- Worked with staff from across ICMA to redesign the ICMA Web site and implement new social networking and content management functionality for ICMA and the Alliance for Innovation to be launched in the fall of 2009.
- Upgraded all staff to Office 2007 with existing resources and cost-effective DVD training.
- Programmed significant upgrades to credentialing and JobCenter online systems to make them more efficient and to improve the member and customer experience.
- Upgraded software for the following ICMA systems: financial, association management, performance evaluation, and timesheet and expense.

Finance

- Obtained an unqualified opinion on the audit of the FY2008 books and records, with no material findings or control weakness reported.
- Established benchmarks and forecasts that helped program staff make informed decisions throughout the year.
- Distributed dividends of \$625,000 to ICMA from the Real Estate Investment Trust (REIT). This distribution was made possible from the conversion, in 2007, from a corporate ownership structure for the ICMA building to a REIT.
- Assumed responsibility for the financial management of the Center for State and Local Government Excellence.

ICMA General Fund Net Assets (Fund Balance) 2001 - 2009



Human Capital/Resources

- Developed ICMA's first 360° performance appraisal for staff.
- Completed the Human Resources Handbook on policies and procedures.
- Held the second annual ICMA Benefits Fair and ICMA College Days 2008--a three-day professional development activity for all staff.

Contract Administration/Support

- Ended FY2009 with an overhead rate of 53% and field office average rate of 15%. This represented a significant reduction from prior years. The rate reduction was due to more strictly defined allowable charges, improved monitoring and compliance, staff training and staff turnover, and increase in volume of funding.

CENTER FOR STATE AND LOCAL GOVERNMENT EXCELLENCE

- Published three research studies on retirement plan issues and six reports on retiree health care benefits with university partners at the Center for Retirement Research at Boston College and a team from North Carolina State University.

- Developed an online poll on retirement plans and distributed it through IPMA-HR and NASPE: "A Tidal Wave Postponed: The Economy and Public Sector Retirements." Poll results were featured in a *Wall Street Journal* column.
- American Public Radio's Marketplace reporter Stephen Hess interviewed the Center about its research, as did *American City & County Magazine* and *HR Executive*.
- Created new online "Government Benefits Comparison Tool" with the Government Finance Officers Association, making it possible for local governments to compare their pension and retiree health benefits with those offered by other local governments.
- Held a webinar with AARP to showcase the Center's research and a local government's experience in using AARP's free workforce assessment tool.
- Wrote articles for state and national magazines: "Local Government Retiree Health Care: Current Offerings and Future Direction," *Journal of Compensation and Benefits*; and "The City Employment Edge," *Minnesota*

Cities; and five articles in *Local Government Matters*.

- Center research cited and quoted in CNN Money.com/Fortune, Reuters, ASPA's *PA Times*, *Sacramento Bee* column by Dan Walters; Associated Press, *Employee Benefit News*, *El Paso News*, *West Virginia Daily Mail*, Washington's Municipal Research and Services Center, *Virginia Review*, and more than 50 other publications and blogs.
- Made presentations on retiree health at the ICMA Annual Conference and

hosted discussion on innovative employee benefits; "The Public Sector Workforce—Past, Present, and Future" at the Labor and Employment Relations Conference; and "Pensions and Retirement Security" at the Local Government Managers Association of Nevada Winter Conference.

- Published nine issues of e-news, reaching 1,100 individuals.
- Established the Center as an independent 501 (c) 3 organization.