



PM MAGAZINE

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Climbing the Mountain: Seeking and Succeeding in Your Next Position

Changing jobs and possibly moving can be hard on you personally and on your family. As you go through a transition, it is important to succeed professionally, but it is even more important to ensure your own health and welfare as well as your family's. Do not lose sight of work-life balance as you go through the transition. If your life is balanced, you will work better and you will be a better family member.

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PM's Web Site This Month Features This Exclusive Article

Does Your Local Government Use Solar PV Panels on Its Buildings (see Active Living department in the

Managing Government in Hard Times: Prudent Options for Balancing Public Budgets

This article provides a summary for new local government managers and an overview for seasoned managers too on how to balance budgets, to keep tax increases to a minimum, and to make every effort to maintain existing public services. Local government officials can make good use of lessons learned from the past. There is no need to reinvent the wheel when it comes to balancing public budgets in hard times.

Roger Kemp, Ph.D., Meriden, Connecticut.

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COVER STORY

Climbing the Mountain: Seeking and Succeeding in Your Next Position

by Charlie Bush, Tansy Hayward, and Noah Simon

Each of the authors of this article recently accepted or was promoted to a new position in local government. For two of us, our new positions required relocating to new communities—a smaller community for one and a new state and community for the other. Our experiences in deciding to seek and accept new positions and then relocate have yielded useful information, tips, and insights into our personal decision making before we moved ourselves and our families.

Looking For a New or Next Job

Many factors were involved in our decisions. For two of us, the decision to change positions was our own drive to challenge ourselves in local government. For the other, it was an opportunity to continue the work within the organization but with an expanded role. In making the decision to look for and change jobs—or even when you look for your first job—you must ask yourself (and your loved ones): Where do I want to go professionally and geographically, and what do I want to do in local government?

For some people, family or other reasons create a tie to a geographic region, state, or city; others may be more nomadic and the professional challenge or opportunity is their driving force. In either case, the decision needs to be made with your spouse and family. Everyone should be comfortable with the decision. In local government management, professional happiness is often linked to personal happiness.

Your next job or your new job should be an opportunity to learn, grow, and apply your skills and knowledge. Here are some questions you should ask yourself.

If you are looking for a job as an assistant or department head, will the position enable you to learn from an experienced manager and staff? Will the opportunity and organization also allow for you to grow personally?

For the position of manager, is it one that offers a unique challenge or set of challenges that will enable you to apply your skills? Is the position, regardless of title, one that will allow you to develop, obtain new skills and experiences, and position you for future opportunities?

Thoroughly examine the environment to ensure that it is a good fit for you. Heed red flags and other warning signs you might notice—political instability, a sense that the organization's culture or values may not be a good fit for you, or concerns about the community in which you would be working. Know what you are getting into.

Opportunities abound in local government—in communities of different sizes, urban and rural environments, and variations in form of government. Our profession is rare because we have a lot of freedom to go to different places and do different things.

Before applying for a position, visit the community if at all possible. This is especially important if the community is new to you or if you are going from rural to urban, small to large, or vice versa. It is important for you to take the time to visit and feel comfortable with and in the new community. Include your spouse and family; see if it feels like "home" for all of you.

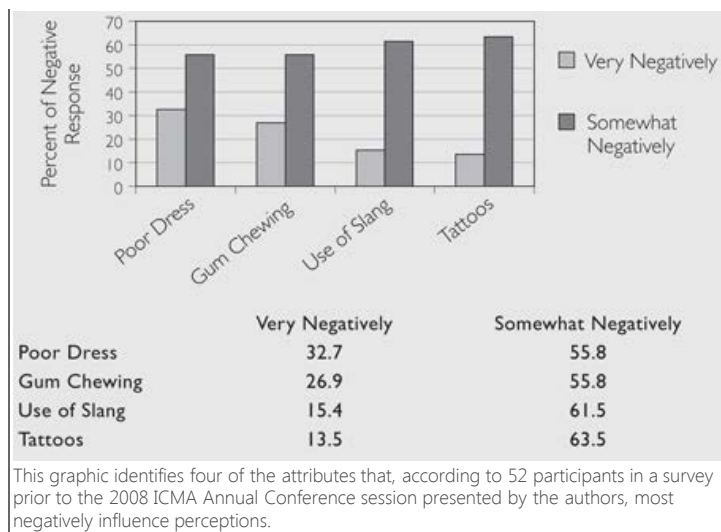
Do Your Homework

Physical Attributes/Behaviors that Negatively Influence Perception of Professionalism



Learn as much as you can about the job, the organization, and the community. Use the Internet, read local newspapers, research issues on the organization's Web page, watch council meetings online and in person, and network. Talk to other local government officials—if possible, the former or current person in the position—local and regional associations, and councils of government.

Get to know as much as possible about the organization and community, and share that information with your family. Try to do much of this before you apply and certainly before the interview. It will help you make the right decision about applying and accepting the job if it is offered. It will also help you put together a better application.



Reeling It In

After you are comfortable with pursuing the job, it is time to apply. Your application should be meticulous. Be sure to have someone else review it before you submit it. Leave yourself plenty of time to do a good job of writing it. Do not hesitate to ask some of your peers for suggestions.

We have received countless suggestions and pieces of advice for writing cover letters and approaching application questions. There are many right ways to go about it. The key is to present yourself in the best light possible for that specific position while being forthright about your values, experiences, and qualities.

When it comes to interviewing, practice makes perfect. Review your research, your application, and the job advertisement to develop strategies for answering particular questions as you pursue the position.

If you are working with an executive search firm, see what additional information you can glean from that firm. When you have done this, take time to practice interviewing. Many typical questions are freely available on the Internet. Practice out loud and have others ask you questions as well.

During the actual interview, be sure to present yourself with a bit of enthusiasm. Answer questions completely but succinctly, and take time to read the body language of your interviewers. You can adjust your answers or your points of emphasis according to the reaction you are receiving.

You should be able to determine whether you are connecting with your audience. Be prepared to ask questions of your interviewers. Remember that they are trying to impress you as much as you are trying to impress them. If all goes well, you will get the offer, have an opportunity to negotiate, and eventually land the job.

Learning the Organizational Ropes

As new people in established organizations, we found the strategies presented below to be valuable for acclimating to the organization and organizational culture. It is important to build relationships and gain, earn, and build trust and respect with your peers.

During the first few days and weeks, listen, learn, and absorb. Watch and learn from department heads or the manager. If you are the manager, absorb as much as possible. You will hear a lot of things from a lot of different sources, but you will not have the full contextual understanding of the situation necessary to be able to form accurate opinions.

Be patient and listen; act when you are comfortable that you have an accurate assessment of the situation. With your staff, council, and new community, be open about your background, values, and plans. Doing so will build support and will help to ease anxiety that comes with any change in leadership.

Before your start date, read as much as you can about current projects, the budget, goals, and objectives. Spend time over e-mail and on the phone with staff, the manager, and department heads. Use the time to review projects and issues and become familiar with people and responsibilities so that when you arrive, you can hit the ground running. Find out from staff who the key players and stakeholders are for some of the more pressing issues.

As a manager, assistant, or department head, be visible in your first few days and weeks. Meet and talk with the staff and community leaders. Listen to their ideas and concerns.

In the company of a variety of staff members, take tours of facilities, project sites, and the community. See the community from their perspective, and gain an understanding of the issues and their points of view. Spend time in their shoes, meet with them, spend time doing what they do.



Working Effectively with Others

Much of your success in your new position will depend on your ability to work with others. Here are some suggestions:

- Get to know the staff, and define your expectations.
- Establish goals and priorities, and develop a personal workplan.
- Clarify roles and boundaries.
- Understand the organization's and the community's politics.
- Learn the community issues, needs, and wants.
- In discussions, always try to avoid things becoming personal; stick to the professional issues at hand and be friendly and professional.

If you are working for the manager, you can take several steps to build a healthy and productive relationship. It starts with communication. If possible, debrief regularly with the manager to discuss issues and strategies.

Learn your manager's style. With some managers you need to be brief while others may appreciate a lot of analysis and discussion. Be prepared to make recommendations to the manager. Most managers will want to know your opinion and will accept your recommendation.

If you are the manager, it is also important to build effective relationships with your staff, the council, and the community. Help them to understand your style so that they can better work with you.

Making Change in a New Organization

As you become more comfortable in the organization, you will be faced with making changes. We have faced many of these situations. In one city, department heads went directly to the manager when they should have gone to the assistant. In another city, many bureaucratic processes ran through the manager's office.

In both cases, we made necessary changes collaboratively, by talking with staff about the changes and involving staff in the change. We each tried to be consistent in our own behaviors to help make the changes easier for everyone involved. It is also important to assess later, after the change has been in effect for awhile, whether the change was positive or whether it still required additional action.

Settling In While Keeping Balance

Changing jobs and possibly moving can be hard on you personally and on your family. As you go through the transition, it is important to ensure your own health and welfare as well as your family's.

Do not lose sight of work-life balance as you go through the transition. Find some activities outside of work that can help you manage stress and balance your life. Stay physically active. Make time for your family as you adjust to a new environment.

If your life is balanced, you will work better and you will be a better family member, and your efforts in both areas will be more sustained. You also will be a better role model for fellow employees, helping them sustain their professional and personal success.

Career-Building Programs through ICMA

Leadership ICMA. Join a competitive, intensive two-year ICMA University program designed to cultivate key competencies needed for successful leadership at all levels of local government management. Participants not yet eligible for credentialing can join a class of up to 15 individuals to complete a series of five class modules and a team-based capstone project. All Leadership ICMA graduates receive one year of experience "credit" toward the ICMA Voluntary Credentialing Program. For information, visit the Web site at icma.org/leadership.

Local Government Management

Fellowship. This highly competitive career-development opportunity is designed to generate interest in local government careers among recent master's program graduates. Selected Fellows are placed in full-time management track local government positions, shaped by direct mentorship under senior government leaders and rotational assignments. ICMA is seeking hosts for current and future fellowships. Web site, icma.org/lgmf.

Emerging Leaders Development Program.

Designed to help emerging leaders build contemporary management skills, the Emerging Leaders Development Program provides a credentialed manager to serve as career coach for two years, and convenient teleseminars with Charldean Newell, editor of *The Effective Local Government Manager*, Robert Stripling, former manager of Staunton, Virginia, and other senior credentialed managers or public administration professors. Successful completion of the two-year program is celebrated with a special certificate. Web site, icma.org/eldp

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FEATURE

The Case for Immigrant Integration

by Nadia Rubaii-Barrett

Communities across the United States and Canada have experienced an influx of immigrants during the past several decades. Although the current economic recession has dampened the rate of new arrivals, there has been no measureable outflow. The national contexts differ significantly in the United States and Canada, but the challenges facing local governments are similar.

The U.S. system is characterized by outdated admissions criteria, lengthy administrative backlogs, and alternately heavy-handed and nonexistent enforcement of border and labor policies. Canada is more explicitly welcoming of immigrants: it has an official policy of multiculturalism and mutual adaptation, and it also is more selective in admissions.

In both countries local government officials are frustrated by a lack of adequate resources from the central government and the logistical challenges of serving diverse immigrant populations. Local government capacity is particularly taxed by new arrivals who come from more varied national origins and cultures than earlier generations, speak a wider range of languages, and are settling in places outside the traditional gateway cities.

The focus of this article is on how professional local government managers can integrate recent immigrants in ways that benefit both immigrants and long-term residents of a community and that can make local service delivery more effective. After providing an overview of immigrant integration and several reasons for pursuing this approach, I share the experiences of a few communities that have engaged in integration.

Immigrant Integration: What Does It Mean?

Local governments have applied a range of strategies in order to respond to the challenges of immigration. Some communities have declared themselves sanctuaries for immigrants regardless of their legal status; others have adopted anti-immigrant ordinances with aggressive enforcement provisions and strict penalties for individuals who house or employ undocumented immigrants. Such extreme policies receive the bulk of national media attention, but they are not the norm.

When ICMA conducted a quick online survey in the summer of 2008, fewer than 5 percent of the 517 respondents reported that they had enacted either sanctuary designations or strong anti-immigrant ordinances, whereas 35 percent reported having no local policy response to immigration.

Respondents who reported adopting local policies most commonly did so to provide some local government materials in languages other than English and to refer immigrants to nonprofit or religious organizations.

Immigrant integration is not simply the absence of a pro-immigrant or anti-immigrant policy. Doing nothing in response to an influx of immigrants ignores the responsibility of leadership and leaves to chance how the immigrants and the community will fare. Integration involves deliberate action grounded in a belief that immigrants and

Local Policies and Practices in Response to Immigration.	
Local government leaders who responded to an ICMA Quick Survey conducted in the summer of 2008 reported that:	
55%	Provide local government materials in languages other than English.
40%	Refer immigrants to religious or nonprofit organizations for services.
35%	Have no designated local policies or practices regarding immigrants.
31%	Hold community events to promote immigrant contributions to the community and to celebrate diversity.
30%	Encourage or require local government employees to obtain cultural competencies.
19%	Require local law enforcement officials to report undocumented persons to federal authorities.
12%	Require local law enforcement officials to obtain federal training on immigration, and customs enforcement (ICE).
5%	Established day laborer centers.
3%	Established a local office for immigrant services.
3%	Adopted English-only policies for local government documents and proceedings.
3%	Adopted limited ordinances intended to restrict the ability of illegal immigrants to work or live in the community.
1%	Adopted strong ordinances with penalties for those who employ, house, or otherwise support

long-term residents are not competitors in a zero-sum game, and communities do not have to make choices among the goals of public health and safety, economic development, inclusiveness of newcomers, or community cohesion.

illegal immigrants in the community.
1% Officially adopted a designation as a sanctuary city/county.

A variety of strategies can be used to promote immigrant integration, including community dialogues, festivals and celebrations of diversity, translation services, language instruction, immigrant representation on governing boards, and coordinated outreach efforts. Admittedly, some communities that pursue immigrant integration also adopt a sanctuary designation, but this is not a required element of integration; neither does it constitute integration on its own.

The common denominator among integration strategies is that each action is undertaken with the goals of building trust and a sense of belonging, improving the quality of communication, and engaging all residents in community governance. Also, it needs to be recognized that integration is an ongoing process.

The 10,000-Pound Gorilla in the Room

Any discussion of immigration policies inevitably generates some controversy about undocumented or illegal immigrants, who are estimated to number around 12 million in the United States and 200,000 in Canada. An individual's immigration status cannot be determined unobtrusively, and efforts to use skin color, language abilities, or other indicators as proxy measures generally result in discriminatory treatment of some legal immigrants and citizens.

More important for local governments, the complex web of relationships and interdependencies among legal and undocumented populations makes distinctions counterproductive. Families and households often include immigrants with differing legal statuses, and policies targeted to illegal immigrants generate fear and distrust among legal immigrants as well.

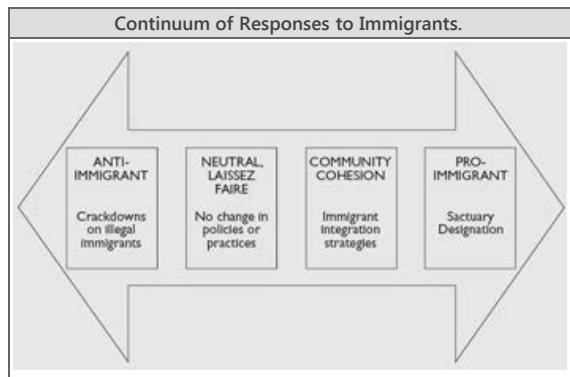
A broad and inclusive definition of immigrants is not a foreign concept to many local leaders. Among those who responded to the ICMA's 2008 survey, a majority indicated a belief that a community should be receptive to all contributing members regardless of their immigration status, nearly 65 percent reported that a vast majority of all immigrants are contributing members of the community, and nearly half acknowledged that local industries would have difficulty filling low-wage jobs without illegal immigrants. Fewer than 20 percent of respondents stated that they believed that local governments had any role to play in trying to stop illegal immigration.

Focusing on What Local Governments Can Influence

In both our personal and professional lives, we can find good advice in the often cited prayer that asks for "the serenity to accept the things [we] cannot change, the courage to change the things [we] can, and the wisdom to know the difference." Local government officials have no control over how many immigrants enter the country (legally or otherwise) or which ones settle in their towns, villages, cities, or counties.

What local administrators can influence, however, is the extent to which immigrants are isolated or integrated—socially, economically, and politically—in their communities. Rather than expend time, energy, and money in costly and often futile efforts to control the flow or settlement patterns of immigrants, local leaders can often be more effective if they invest in integrating those immigrants who are in the community.

Similarly, local officials have no control over whether their communities will change as a result of the arrival of immigrants. Change is inevitable. The meeting point between a community and new immigrants need not be halfway; immigrants will likely adapt considerably more than the communities they enter, but everyone will change. Rather than resist change or allow it to occur in an unplanned or emotionally charged manner, local leaders can facilitate constructive interactions and mutual adaptation in ways that promote community cohesion.



The Rationale for Immigrant Integration

Both the United States and Canada have long histories of immigration and national identities that espouse pride in the tradition of giving people ample opportunity to work hard and participate in social and civic life. When immigrants are isolated from the community, their ability to contribute to the community is impaired. The fear of detection, detention, and deportation felt by undocumented immigrants (as well as some legal immigrants) makes them subject to exploitation in working and living arrangements, a condition that harms the broader social fabric of the community.

Integration directly addresses concerns about the abilities of local governments to effectively and efficiently provide services to immigrant populations. Language barriers are one of the most commonly cited challenges, yet isolation simply delays new language acquisition. Integration provides immigrants with more opportunities to interact with English speakers.

The more that immigrants hear, speak, study, and use the English language, the more quickly they will develop

proficiency. Similarly, building trust and fostering a sense of belonging among immigrants makes them more willing to utilize services appropriately and to assist local government officials in doing their jobs. Local officials are understandably wary of increased demands for local services, but sometimes lack of use is more costly in the long run.

When immigrants use community health centers for preventive care, they not only avoid the more costly use of emergency medical services later on, but they also reduce the risk to public health associated with the potential spread of communicable diseases. Similarly, when immigrants trust local police, they will be more willing to report crimes and cooperate with investigations.

Finally, there are economic rationales for integration. Although many local anti-immigrant policies are adopted with the goal of protecting the local economy, they have been repeatedly demonstrated to consume tremendous local resources for implementation, enforcement, and litigation. Anti-immigrant policies are officially directed only at undocumented immigrants, but there is considerable evidence that they have spillover effects on legal immigrants and legitimate businesses.

The local economy often suffers when workers leave, housing units are vacated, and businesses are forced to close. In contrast, an immigrant integration approach draws upon the contributions of all residents to enhance economic development, promote entrepreneurship, and increase community sustainability.

Stories of Immigrant Integration

So, how does immigrant integration work at the local level? There are a number of varied examples to choose from. For the purposes of this article, I limit the discussion to examples dealing with increasing trust in law enforcement and opening lines of communication between the immigrants and the government and long-term residents.

Community policing and immigrant integration. Immigrants may be wary of local police officers because of fear of deportation (their own or that of family members), negative experiences with police in their home countries, or language and cultural barriers. Regardless of the underlying cause, distrust complicates the task of law enforcement, making immigrants more reluctant to report crimes, and to serve as witnesses. It also makes them more likely to be targets of criminal activity.

To build trust, local law enforcement officials have tried a variety of approaches. The Chicago Police Department coordinates regular community forums for immigrant groups; Bellingham, Washington, uses special liaisons for ethnic groups; Delray Beach, Florida, established a Haitian Police Academy; Corcoran, California, offers a Spanish-language citizen's police academy; and police in Orange, New Jersey, and Dallas, Texas, help immigrants become citizens.

The experiences of Santa Ana, California, illustrate the benefits of an immigrant integration approach in law enforcement. When the city experienced rapid increases in the numbers of Mexican immigrants and Cambodian refugees, city officials also observed an increase in gang and drug activity.

Traditional law enforcement methods proved ineffective. The city then shifted to a community-policing approach: in an apartment building they set up a substation staffed with Spanish-speaking officers with access to Cambodian translators; they increased area patrols; and they collaborated with schools, social service agencies, and community organizations. This culturally sensitive and integrative approach resulted in measurable decreases in criminal activity, a stronger sense of community pride among the immigrant population, and improved communication between police and residents.

Opening lines of communication. Two-way communication is essential to integration efforts. This can be accomplished through several methods. One approach is to include immigrants on advisory boards that inform local government policy. Designated immigrant representatives can be included on an existing advisory board (as in the case of the Health Advisory Board in Contra County, California), a group can be created for a particular immigrant population (the Commission on Latino Affairs in Indianapolis/Marion County, Indiana), or a broad-based immigrant advisory group can be established (Seattle, Washington's Immigrants and Refugees Advisory Board or Vancouver, British Columbia's Immigration Task Force).

Communication can also be established through electronic means. In Toronto, Ontario, a designated immigration and settlement portal provides access to information for immigrants before and after their arrival. The site provides information on what to expect upon arrival and addresses issues of transportation, housing, employment, education, and recreation.

Each Web page includes an Inquiries/Feedback link to allow the user to ask questions or comment on the site. Web sites targeted to immigrants also help convey a welcoming message. The town of Morden, Manitoba, uses its Web site to attract immigrants. The Web site markets the town as a clean, safe, pleasant place for immigrants to settle, work, and raise children.

Lines of communication must be established with residents as well as government officials. Stereotypes and mistrust often stem from lack of information and limited interaction. In the absence of deliberate local government efforts, immigrants and long-term residents may pass each other regularly on the streets and in shops but never really engage.

With initial support from the nonprofit Colorado Trust and the Colorado Municipal League, several communities across the state have hosted meetings that bring together immigrants and longtime residents with the goal of fostering trust

and understanding. Boulder County, Colorado, has facilitated Dialogue Groups, Dialogue Days, and Action and Celebration Forums. Longmont, Colorado, hosted Quesadillas and Conversations; and Littleton, Colorado, has held Community Conversations.

In each of these contexts, immigrants and longtime residents were brought together to talk informally about their cultures, traditions, and experiences, sometimes with a specific goal of recommending changes to local policies and practices, and other times simply to foster mutual understanding. Participants in these sessions—immigrants, citizens, and government officials—report having learned as much about themselves as they did about the others, gaining an increased sense of empathy and understanding and feeling a greater sense of community and shared interests.

Consider the Positives

Immigrant populations place additional demands on local governments, but they also have the potential to enhance the economic and social vitality of a community. Given an opportunity to be full members of a community, immigrants can contribute their labor, energy, and diversity in positive ways.

The challenge for local leaders is to lead the discourse away from the emotionally charged rhetoric that often characterizes the immigration issue and ensure that policies support the universal priorities of local governments, namely public health and safety, economic development, and community cohesion. Communities that have pursued immigrant integration have observed increased levels of citizen satisfaction and pride in the community.

As President Barack Obama articulated in his inaugural speech, we need "to extend opportunity to every willing heart—not out of charity but because it is the surest route to our common good." By recognizing the potential for diversity to be a community asset and acting strategically to realize that potential, communities that engage in effective integration of immigrant populations can become stronger—economically, socially, and civically.

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Ethics

Social Media in Public Life

Scenario: Blogs are a part of the social fabric of this community so it wasn't unusual when a new one entered the blogosphere. This blogger, going only by the signature City Scoop, professed to have the definitive, inside scoop on city hall politics and activities.

Scoop's musings didn't generate much interest until several postings turned out to be accurate and were reported in the blog well ahead of the mainstream media. In fact, one item hit the blog the day before it was reported at a city council meeting. None of the information reported in the blog was confidential, and it all eventually entered the public domain.

After several weeks, the buzz in the blogosphere and on the street was that Scoop really did have a seat inside city hall. A persistent fellow blogger speculated that, given the topics addressed and the nature of the information revealed, the blogger had to be the city manager!

If all of the information reported in the blog was eventually released to the public and none of it was protected by confidentiality laws, was it ethical for the manager or a senior staff member to blog anonymously about local government matters?

Advice: A blog can be an effective tool in a manager's arsenal for keeping the public engaged in local government matters. The ICMA Code of Ethics emphasizes the importance of keeping the community informed on local government affairs and encouraging communication between residents and all local government officials and staff.

But equally important is communicating in a transparent manner. Even if the information is a matter of public record, the credibility of both the manager and the organization is harmed when information is presented in less than a clear, purposeful, and transparent manner. The practice of anonymous blogging raises important questions in readers' minds about what would motivate a professional to disguise his or her identity when writing about the organization.

IT'S MY SPACE!

Scenario: A former employee filed a lawsuit against the county alleging in part that the county manager created a hostile work environment and discriminated against female employees. As evidence of her claim, she submitted photos and materials posted on the county manager's personal social networking page.

The photos showed the manager drinking at tailgate parties, socializing at various local bars, and partying with some female county employees after an all-staff picnic. Although the manager was not depicted in these photos in the best light, the photos were pretty mild.

Of greater concern were several sexist statements attributed to the county manager on his page and the responses posted by others on his message board. All of the facts presented in the case eventually exonerated the county manager.

He had the opportunity to tell both the court and the public that the sexist comments he posted were just a running joke that he had with his wife and were not intended for public consumption. He was truly mortified by the whole situation and publicly apologized for embarrassing the county.

Advice: Today's commonsense understanding is that you should have no expectation of privacy when you post anything on the Internet. Employers in both the private and public sector have limited tolerance for employees who embarrass their organizations by posting inappropriate material on their social networks.

The vetting process to determine whether a candidate for a position is suitable now often includes a review of the content on their social network, blogs, or Web sites. Before posting content to a social network or allowing friends in to contribute, think about whether it reflects well on you as a professional and enhances your public role.

One old-fashioned test works for new technology, too: Would you be okay with putting a specific photo or comment on the front page of the newspaper for the world to see? The high standard set by the ICMA Code of Ethics requires members to conduct themselves so as to maintain public confidence in their profession, their local government, and in their performance of the public trust.

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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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On Retirement

Starting in a New Role: Taking On Retirement Issues

This month's issue of *PM* magazine gives special attention to the responsibilities, tasks, duties, and challenges that new city or county managers inherit as they take on that particular leadership role in their community.

One issue of primary importance for new managers to keep in mind is how their employees are preparing financially for their future, and what the city or county is doing to help them get ready. Saving enough for a secure retirement is a critical area of concern. According to a 2008 survey commissioned by the Employee Benefit Research Institute (EBRI), 49 percent of workers have less than \$25,000 saved for retirement. This number excludes home values and defined benefit pensions.

ICMA-RC recently partnered with WB&A Market Research to study the motivational behaviors that have prevented some public sector employees from taking a more active role in saving for their retirement.

One of the findings showed that one reason for lower savings was simply a lack of awareness that a 457 supplemental retirement savings plan was available to them through their employer. Another significant finding showed that employer support for the retirement program played a significant role in employee enrollment.

Employer-sponsored defined contribution plans offer employees a prudent retirement savings option. Generally, 457, 401, or 403 plans have benefits over other ways of saving for retirement on one's own. For instance, contributions are made pre-tax and earnings grow tax-deferred, and only withdrawals are taxed; employees can take their money with them if they change jobs; and it's easy to get started.

Lack of awareness of such a plan, however, could keep people who would otherwise enroll from doing so. Non-saving participants who participated in the WB&A study noted that they were most frequently introduced to the city or county's 457 plan during employee orientation, but most came away without understanding why it would be beneficial for them. And only 50 percent of the non-saving participants interviewed for the study thought that their employer encouraged employees to participate in a 457 plan.

Among participants in the study, almost all the individuals who saved cited employer support as one of the main reasons they decided to enroll in the 457 plan. Employers can demonstrate support by:

- Encouraging saving for retirement through the city manager or other influential members of the management team (e.g. Human Resources, Finance).
- Distributing enrollment packets to all new hires.
- Providing a match, or a temporary match.
- Distributing communications about saving for retirement electronically via e-mail or intranet.
- Facilitating financial education seminars or presentations for employees.

By taking an active role in supporting a supplemental retirement savings plan, a city or county manager can have a significant impact on getting employees to take more responsibility for their financial future. An effective leader will want to help guide employees toward building retirement security, so that once they're no longer employed by the city or county, they can fully enjoy the retirement benefits gained during their career. Encouraging participation in a retirement plan is integral to this goal.

—Joan McCallen
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DEPARTMENTS

Profile

New Village Administrator Brings Wealth of Experience



Photo: Roberta Baumann/*Waunakee Tribune*

William P. Barlow III, ICMA-CM, is village administrator of [Waunakee, Wisconsin](#).

Visitors to Bill Barlow's office may notice the portraits of Abraham Lincoln and Theodore Roosevelt hanging on the wall. Small busts of Harry Truman and Franklin D. Roosevelt line the window sill with a statuette of Superman. These heroes seem to provide inspiration to Barlow, who has met tough challenges in his 30-plus years as a public administrator.

William P. Barlow III (most call him Bill) has served in seven varied communities all over the Midwest in different settings—communities with high degrees of poverty, others more flush, and some with strong retail or manufacturing. One of them, Brighton, Michigan, served as a General Motors headquarters of the Buick/Oldsmobile/Cadillac Engineering Group.

"I've had a wide variety of experiences that I don't think you get in one state," Barlow said. Many of his decisions to move were prompted by his family circumstances in Dayton, Ohio, and his wife's in La Crosse. Yet all the relocation posed a hardship to his wife, Kathy, and their two children over the years, he added, saying he felt blessed for her support.

Barlow has visited this area many times with Kathy, a UW-Madison alumna, and the couple liked the idea of being closer to her family. Barlow is now looking for a long-term fit as Waunakee, Wisconsin's village administrator, he said.

Late last year, as he sought to leave Winfield, Illinois, and cast a net for a new position, he had several offers, including one in Iraq as a government advisor. Though lucrative, that position probably seemed less attractive when Barlow learned he would need a flak jacket and a helmet.

Barlow decided to leave his city manager post in Winfield because the Chicago suburb was "hemmed in," he said. It had an anti-annexation policy, and the citizens' views toward growth were conflicted.

As a result, the local tax base suffered so much that Barlow often purchased his own office supplies—printers, overhead projectors, and digital cameras—out of his own pocket. "They were drying up from the standpoint that they don't have the revenue stream," Barlow said.

As an example, Barlow said street repairs were needed, but at a public meeting, some residents expressed a preference for the roads to return to gravel as a traffic calming measure.

"I tried to convince them to find new ways to fund the repairs, but they tabled it," Barlow said. "I thought if I stayed there, I would be continually frustrated."

Barlow encountered an entirely different atmosphere in Waunakee. "This was a whole town," he said about this village. "It has all the characteristics of a complete identity. It was clear when I drove in that this is a solid community with a solid base that is growing."

Waunakee reminded him of Sidney and Xenia, two Ohio communities, he said.

In contrast, students in Winfield attend high school in two different communities, so the football games are played elsewhere. Football games, basketball games, and other school events unite a community, he noted.

"If you look at all the things that are community-building—recreation, churches, schools—they're not unified," he said about Winfield. "That can contribute to a 'we versus they,' " Barlow said.

Waunakee's village board sought a new administrator who could lead the village's economic development efforts. And Barlow describes himself as an "implementer," saying he enjoys selling. "I'm a salesman from way back," Barlow said, noting that he sold shoes to put himself through college. William P. Barlow senior, Barlow's grandfather, worked for Sylvania and was the national salesman of the year in 1962, he pointed out.

The junior Barlow added that his administrator's post is sales related—it requires the ability to listen to citizens, learn their needs, and solve problems.

Last week, a hired consultant presented an economic development vision plan to village board members, developers, and other community leaders. Barlow said Waunakee Village Board President John Laubmeier would like to see steps for its implementation once the board adopts the vision plan.

"This board wants to see us focus more on economic development," Barlow said.

The vacant lot at Main and Madison streets is a focal point.

Barlow nearly opted for a career in politics. He studied pre-law at the University of Dayton and planned to get his law degree. Then he interned at the city of Dayton and found he preferred city management.

"I think there was a time when I wanted to be the guy out front," he said, noting that he had once petitioned for public office. But he pulled his petition. "My future didn't lie in being the person out front but behind the scenes. You're responsible for implementation and carrying out the will of elected officials," he said. He changed his major to public administration and then pursued his graduate degree at the University of Kansas.

Barlow will face challenges ahead, some requiring courage. On his wall hang reproductions of a Civil War saber and a rifle with a bayonet, replacements of originals once owned by his family. His wife won't allow the historic weapons in his house, he said. But in his office, those, along with the images of this nation's great leaders, remind him of the work ahead and the past heroic acts.

While Barlow is settling into the village hall office, making a home for himself and his wife here will take more time. Kathy is a speech pathologist, so she will need Wisconsin licensure and then, to find a job. The couple must also sell their home in Schaumburg, Illinois, in this strained housing market.

The couple has two children, Peter, 22, and Caitlyn, 25.

When Barlow has free time, he enjoys creative writing. One of his short stories won an honorable mention in the *Dayton Herald's* Erma Bombeck Christmas story contest. Barlow also enjoys genealogy. His maternal grandmother traced their ancestry back to Charlemagne, and Barlow hopes to pursue other branches of the family tree.

Barlow recently bought an electric guitar and is strumming chords he played in his high school and college rock-and-roll bands. "I'm trying to hold onto my last grasp of youth," he said.

—Roberta Baumann
Managing Editor
Waunakee Tribune
Waunakee, Wisconsin

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Healthy Communities

The Long Run



Bob Palmer, ICMA-CM, village manager, Hazel Crest, Illinois, in the 2007 Park Forest, Illinois, Scenic 10-Mile Race.

To support his community's strong interest in health issues, the environment, and a better quality of life, Bob Palmer, manager of the village of Hazel Crest, Illinois, is implementing a variety of active living and healthy eating initiatives despite limited resources during an economic downturn.

An avid runner himself, Palmer describes the 15,000 residents of this middle-income, mostly African-American suburb of Chicago as "pretty active," and says they are enthusiastic about his goal of creating more trails and providing local government support for a new farmers market. "The trails [won't be] loop trails," he notes. "They [will be] destination trails to pick up commuter routes."

SUCCESSFUL ENDEAVOR

Hazel Crest's strategy for building a healthier community by targeting how people get to work and engage in other routine activity has good odds for success. Active Living Research (ALR), a national program of the Robert Wood Johnson Foundation, has supported research showing that linking trails to daily destinations is a good way to improve health.

A research summary published by ALR, "Designing for Active Living among Adults" established a clear connection between activity levels and community design. The data, collected from planning directors in 67 North Carolina counties and surveys of 6,694 residents, revealed greater levels of physical activity among residents of counties that have more sidewalks, bike lanes, and trails; more pedestrian-friendly development with a mix of land uses; and strong planning policies.

Residents of counties with "active community environments" were more than twice as likely to walk and bike for transportation, and the association was even stronger among lower-income residents.

Palmer readily acknowledges the challenges of trying to create these environments. But he brings the same discipline and determination—and personal interest—to the task that he has to his own running.

MARATHON RUNNER

He has found his work-life balance in running—lots of it. In the past few years, he has completed four marathons, including the Las Vegas marathon in late 2008. He began the long-distance running habit long ago, training for 5- and 10-kilometer events, but about three years ago he decided to try his first marathon. "I think marathon running was something that I already had as a goal, but didn't really know when I would do it," he says.

In the end, all it took was a little sibling rivalry. After Palmer's sister ran her first marathon, he was inspired to try it himself. Although she's younger and beats him "quite a bit," Palmer says that for him it's more about endurance and commitment.

"My goal in these things is just to finish," he says. And, as is true in his job, speed isn't really the point. "You've got to have some outside interest that you can pursue and get you away from your everyday routine. The work we do is a 24-hour operation, so there's always something more coming in."

The manager's schedule can make it tough to keep any kind of routine, but Palmer has figured out how to fit in his running time. He tries to run during the week whenever possible, and puts in longer runs during the weekends. He uses the local high school track because it has a soft and consistent surface and because it is easy to verify how long he has been running. He also appreciates not having to worry about cars or what time of day or night it is.

CONVENIENCE AND SAFETY

Thanks to resident support for the village's trails projects, the time may come soon when Palmer and other Hazel Crest residents can enjoy the comfortable surface and easy distance calculation he gets at the high school track. He knows that the same factors that enable him to make running part of his weekly routine affect residents' ability to be physically active.

So, besides careful placement of the trails, Hazel Crest will focus on making sure that they are convenient and safe. "We want to put in amenities . . . for people walking their dogs, riding their bikes, pushing strollers, . . ." says Palmer, "like trail distance markers, lighting, trail identification of trees, that kind of thing."

Such investments can go a long way toward increasing the number of people who stay physically active. According to the Centers for Disease Control and Prevention's 2002 *Guide to Community Preventive Services*, creating and improving places to be active can result in a 25 percent increase in the percentage of people who exercise at least three times a week.

In addition to creating a "built environment" that enables physical activity, Hazel Crest is supporting healthy nutrition. Even with limited resources, local governments can play an important role in establishing local farmers markets, which Hazel Crest did two years ago. "We haven't really put much money into it," Palmer says. "We had one staff person here make contact with some of the other towns that were doing it. [The person was] involved in making contact with farmers and trying to get vendors here."

Palmer says he is interested in partnering with local organizations to help run and build up the market, but one challenge is the lack of local nonprofit groups that support such projects. In places that have few clubs and organizations focused on health promotion, it is all the more important for the local government to facilitate healthy lifestyles any way it can. "The village really has to be involved here to create that stuff," Palmer said, adding, "We're going to keep at it."

MAKING INFORMATION AVAILABLE

Another way in which Palmer has tried to take up the slack is by improving the availability of public wellness information. Active in the Healthy Communities Ambassadors program of the International City/County Management Association (ICMA) since 2004, he hears about grants, peer initiatives, and new research findings through the program, which is supported by Leadership for Healthy Communities, a national program of the Robert Wood Johnson Foundation.

"I try to pass out information to other organizations—like the [parks and recreation] district, and the schools," Palmer says. Keeping these lines of communication open is critical, given that the entity that manages parks and recreation in Hazel Crest is not part of the village government, and seven separate school districts overlap the village boundaries.

"We are all trying to get kids outside as much as possible and keep the kids active, [to] get these ideas of healthy living ingrained at an early age," Palmer says. The village reprints relevant information in newsletters and weekly bulletins for residents.

Palmer notes that communication about the value of day hikes and other passive recreation on publicly owned land is

Connecting Policy to Research

To get research summaries, including "Designing for Active Living Among Adults," the publication mentioned in this article examining the connection between activity levels and community design, as well as other top policy findings related to active transportation, community design, active recreation, youth obesity prevention, and more, visit the Active Living Research Web site at

<http://www.activelivingresearch.org/resourcesearch/summaries>.

To learn more about Leadership for Healthy Communities, visit <http://www.leadershipforhealthycommunities.org>; and to find out more about ICMA's Healthy Communities Ambassadors network and other work on this issue, go to

<http://icma.org/activeliving>.

particularly important for the village government for another reason as well: so that people understand the relationship between having protected open space and public health. "We have to try to make people aware of these opportunities and make people understand about open space and building trails through open lands."

Palmer also ensures that public health information has a prominent place in the local government, which has a staff of just over 100 employees. He notes that the village focuses on promoting the basics, including wellness programs that are part of their health-care coverage as employees. "There's a wide variety of programs available. It really gets down to seeing what you already are providing now and promoting them," he says.

Several years ago, Palmer got inspired about children's health while he and county elected officials attended a meeting cosponsored by the National Association of Counties (NACo) and ICMA. "I remember people talking about getting the [soda] out of the vending machines. What's really difficult is looking for these opportunities where you can make those kinds of positive changes, and having them simple enough that you can really get something done," he observes.

Certainly, working with seven school districts can be an uphill climb. Palmer says, though, "Our police and fire [departments] are really pretty involved with [the schools] . . . in terms of education and crisis management planning and laying down those communication channels. I think our relationships with those other governmental entities are at an all-time high. That might give us some opportunities."

Even as he advances change at a pace the local government can sustain through difficult economic times, Palmer is philosophical about upcoming projects. "We've talked about community gardens, and we do have space for it in our open lands area. So I wouldn't be surprised if we were doing that next year."

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PM MAGAZINE

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Teaching Resources

Go Teach a Course!

ICMA's Advisory Board on Graduate Education urges members to share their experience by serving as adjunct faculty at a local university, and its members have helped ICMA develop resources for managers who want to go back to the classroom.

How Do I Get Started?

Here are ways that managers can engage with MPA or MPP programs:

1. Approach one of the schools in your area and express an interest in teaching. The National Association of Schools of Public Affairs and Administration (NASPAA) maintains a list of member schools with accredited graduate public administration programs on its Web site. For other colleges in your area not on this list, you could check with the political science department about undergraduate offerings in local government or public administration and whether the department has a graduate program in public administration.
2. Or, if you'd like to learn a little more before contacting a school, you can turn to several ICMA resources. You can join ICMA's forum for adjunct faculty, located at ICMA's Web site forums.icma.org. You can also download ICMA's publication *Managers as Teachers: A Practitioner's Guide to Teaching Public Administration* at icma.org/nextgen under "Teaching Resources."
3. Each year at the ICMA Annual Conference, ABGE hosts a discussion session for managers who teach or for those who would like to teach. Watch for information in the conference program.
4. If you have taught a course in the past, send your syllabus to nextgen@icma.org, and it will be posted on the ICMA Web site for others who are interested in teaching similar courses.

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What Is Your Two-Minute Elevator Speech?

Are you familiar with the expression, "the two-minute elevator speech"? In career coaching, it refers to formulating how you will present your employment story—that is, how you will explain to someone you've just met what kind of job you're looking for and what experience and skills you have, all in two minutes or less.

You face a similar challenge when trying to help a citizen quickly understand what you do for a living—which prompts us to ask: What is your two-minute elevator speech about your role as city manager or assistant manager, county manager, or chief administrative officer? Those titles don't have meaning for most citizens, yet often you have only a minute or two to explain who you are and what you do.

We'd love to hear the two-minute elevator story you tell citizens to describe what it is you do. And we'd love to share it with our readers.

Translated into the printed word, the two-minute elevator story is no more than 250 words. Send your description of what being a professional in local government is all about to bpayne@icma.org, and the responses will be published in upcoming issues.

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Leaders at the Core of Better Communities

ICMA Management Perspective

March 2009

Mobile Workforce Management

Introduction

Virtually every city and county across the country has a mobile workforce. At any given time, some percentage of the workforce is conducting local government business away from the traditional office, cubicle, or meeting room. And it's not just police officers, firefighters, or other fleet vehicle operators. It's building and health inspectors who move from site to site; managers and economic developers who travel for official business; teleworkers and flextime employees who spend part of their week working from home and remote facilities—all are part of a mobile workforce. Employee mobility is an executive-level issue because it spans the entire organization, although its management is often decentralized and almost invisible from a comprehensive point of view. As the private sector has long realized, strategic management of employee mobility can yield substantial bottom-line and productivity improvements, as

leading edge local governments are discovering.

Mobile worker programs touch all aspects of local government, from fleet vehicles and government buildings to ongoing expenditures such as fuel and personal vehicle reimbursements to the mobile workers themselves. Looking at this issue holistically can help shape policies that leverage expenditures across departments more effectively while retaining employees who need flexible and creative approaches to where and how work gets done.

Controlling Costs and Maximizing Benefits

Local governments are under increasing pressure to maximize service and to minimize costs during a time of resource scarcity and flattening or declining budgets. A recent study by Runzheimer International, an ICMA strategic partner, estimates that an employer's average mobility costs—such as for

travel, virtual offices, relocations, fleet vehicles, and aircraft—are equivalent to or higher than what an organization spends on health care. Relocation and aircraft are often minor or nonexistent items for local governments, but travel, fleet vehicles, and virtual offices/telecommuting are integral to nearly all operations. Understanding the financial impacts and opportunities related to mobile employees can alleviate fiscal duress and makes good management sense.

GPS Improves Snow Plow Routing

According to David Holmes, assistant city manager in Cincinnati, Ohio, GPS technology on snowplow trucks helped to analyze and improve vehicle routing, saving 22 percent in fuel costs and valuable time. The city has been so pleased with the performance of the technology and the assumed savings that it is purchasing two dozen more GPS units in 2009.

Philadelphia Reduces Fleet Vehicle Costs

In 2003, Philadelphia, Pennsylvania, developed a fleet reduction process that removed 330 vehicles from its rolling stock inventory of 4,500, of which approximately 60 percent were sedans and SUVs. On a related front, the city started an automated car-sharing program with a vendor, resulting in five-year estimated cost avoidance of more than \$4.5 million in maintenance and fuel. Other savings occurred in reduced parking costs and reductions in the acquisition of new vehicles.

In 2008, the city developed comprehensive vehicle assignment and usage policies to facilitate further streamlining of the fleet (e.g., they included stringent requirements for take-home vehicles), with the goal of reducing the fleet by 500 vehicles over the next year. Also, the city continues to extensively use car sharing for passenger vehicle transport and has no centralized vehicle pool.

Mobility and Sustainability

ICMA members have identified sustainability as the issue of our age. It's clear that managing the mobile workforce impacts the sustainability goals of communities, whether by reducing commuter traffic, improving the fuel efficiency of fleet vehicles, or cutting the carbon footprint of local government facilities.

As part of ICMA's larger Sustainable Communities Initiative, an ICMA member advisory group

recently convened for two days to explore workforce mobility. The objectives were to identify the challenges of strategically managing a mobile workforce and to discover opportunities and innovative approaches to draw from. "We are at a critical juncture. For all the right reasons, this is the time to rethink how we strategically manage our mobile workforce," said advisory group participant Roger Fraser, city manager of Ann Arbor, Michigan.

Defining the Mobile Workforce

Borrowed from a definition common in the private sector and used by Runzheimer International, Total Employee Mobility™ is *a management concept and business strategy that takes a more holistic and integrated approach to the mobile workforce, all with the goal of improving an organization's talent management results, profitability, and agility, and ensuring employee satisfaction and well-being.*

Managers in the private sector have paid attention to workforce mobility for years. They realize that a well-managed approach can lead to cost savings, improved employee satisfaction, and better recruitment and retention, especially among young knowledge workers. Given the variety and nature of duties performed outside city hall or the county administration building, it makes sense for city and county managers to recognize the importance of strategically

managing the mobile workforce. A large part of the work that comprises local government responsibilities is mobile: maintaining roads; operating utilities; providing social services; supervising new construction; and inspecting businesses such as restaurants and day care centers. That's without mentioning police, fire, and emergency medical departments.

The ICMA advisory group agreed that there has been a marked evolution in how local government employees travel and work throughout the jurisdiction, commute to work, and, in some cases, telecommute from home and satellite offices. But it also concluded that the policies, guidelines, and reporting mechanisms that support a mobile workforce have developed incrementally and in response to individual and department needs. Too often the management of mobile and telecommuting workers is ad hoc and dispersed among departments—such as human resources, finance, accounting, and purchasing. A strategic approach to managing local government mobile workforce resources can yield positive measurable outcomes.

Getting Strategic

"Sarasota County's mobile workforce management initiative has a direct connection to our environmental and sustainability ethic," said Larry Arnold, the county's executive director of community services. "This community made a commitment to be carbon neutral by 2030." With this man-

date in mind, Arnold, together with Hugh Henkel, the county's manager of strategic operations, convened a group of county employees to brainstorm about how best to manage their mobile workforce. They decided to take a holistic approach and look at what would serve the bottom line while allowing the county to achieve its environmental goals and satisfy customers and constituents. To do this, they categorized the nine most important elements of a mobile workforce. (See graphic, "Complexities of the Mobile Employee.") Then they examined important considerations in each category. They asked themselves, for example, what kind of communications procedures need to be in place to best manage mobile employees? How do we keep our mobile workforce informed? What kind of human interaction is needed and how often?

Among many useful recommendations gleaned from Sarasota's brainstorming sessions was one to closely examine building usage, which accounts for 30 percent of the county's carbon footprint. "If we can't address that 30 percent, we'll have a lot of challenges reaching our carbon-neutral goal," said Arnold. "We either have to reduce the footprint or get rid of the building." For these reasons, the county has begun to look at telecommuting more structurally and to find greater efficiencies in managing space.

The county is also examining the value that could be created if field workers in operations and maintenance were given more flexibility. Says Henkel, "It might



be that the worker's day starts from when he turns on his truck in his home driveway. He doesn't have to drive the 30 minutes to the dispatch place, check in with the boss, pick up gear, and then start the workday. He checks in before he leaves his driveway and the workday begins. It's a huge cultural change."

Leadership is Central to Success

As with any government initiative, leadership can make the difference between success and failure, or whether an issue is even identified as something worth acting on. Such was the case in Loudoun County, Virginia, where the commitment and vision of the county administrator, Kirby Bowers, propelled a cutting-edge workforce mobility initiative.

Loudoun County is located north and west of Washington,

D.C., and has more than 3,000 employees, 55 percent of whom live outside the county and 21 percent of whom live outside the state. In 2006, the county relaunched a telework program to improve space efficiencies, alleviate traffic congestion and pollution, reduce staff absences, and create opportunities for a better work-life balance, and ultimately to establish a resilient continuity of operations capability. To lead this effort, Diane O'Grady was hired from the private sector.

The county recognizes three kinds of teleworker:

- Worker has predefined schedule; works at home at least 1 day a month
- Worker has short-term remote work, based on illness or temporary assignment
- Work is primarily in the field such as an inspector.

The results of the initiative have been promising. Approximately 20 percent of the county's teleworkers share an office space in one of the government's owned or leased facilities. The program is estimated to reduce the number of car trips by more than 3,000 per month. This corresponds to a substantial reduction in automobile emissions and mileage logged on personal vehicles. Time spent getting to and from work—with commutes that average 48 miles and close to 90 minutes daily—has been avoided, leading to happier and more productive employees. (The county estimates a 20 percent gain in employee productivity.) Interestingly, O'Grady found that the retention rate is substantially better for teleworkers when compared with non-teleworkers. The turnover rate for people who telecommute is about 3 percent, versus more than 13 percent for personnel who do not.

Getting Started

Managers eager to take the first step toward creating an integrated mobile workforce can begin by looking at how Sarasota County got started and how Loudoun County put in place its telework program. After establishing baseline practices and metrics, they established the goals and objectives for their mobile workforce programs. They then built their program to address the objectives, working collaboratively and seeking input from all departments.

At its basic level, employee mobility management is a strategic set of approaches for accomplishing the traditional work and service delivery of local governments in new ways that make sense across a spectrum of financial, client, and human resource variables. Local government managers will

need to identify which approaches make the most sense to meet their particular challenges: cost containment and increased productivity, sustainability, meeting the flexible schedule needs of employees, or some combination of these and other strategic issues.

Next Steps

ICMA, its sustainable communities advisory committee and mobility workforce committee, and strategic partners such as Runzheimer International will continue to explore ways to help local government managers understand the mobile workforce. This management perspective is an addition to the series of new knowledge products and resources that are part of the ICMA Sustainable Communities Initiative.

About ICMA

ICMA is the premier local government leadership and management organization. Its mission is to create excellence in local governance by developing and advancing professional management of local government worldwide. ICMA provides member support; publications, data and information; peer and results-oriented assistance; and training and professional development to nearly nine thousand city, town and county experts and other individuals and organizations throughout the world. More information about ICMA's Sustainable Communities Initiative, including the mobility project can be found at www.icma.org/sustainability.

ICMA

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About Runzheimer International

Runzheimer International is the leader in mobile workforce management, providing an innovative and comprehensive range of Total Employee Mobility™ services relating to business vehicles, relocation, travel management, corporate aircraft, and virtual office programs. Its deep experience in these areas, combined with its unique benchmarking databases, position the firm to help organizations optimize employee productivity while containing costs. Runzheimer serves 60 percent of the Fortune 500, many middle-market companies, and numerous U.S. and Canadian government agencies. More information about Runzheimer's products and services for local governments can be found at <http://government.runzheimer.com/services/government-local.aspx>.


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INTERNATIONAL

Managing Government in Hard Times: Prudent Options for Balancing Public Budgets

by Roger Kemp, Ph.D.

Public officials in communities across the nation have to balance their respective budgets, keep tax increases to a minimum, and make every effort to maintain existing public services. Particular fiscal problems can be state specific, but at this difficult time in our nation's history, all local officials must cope with these difficult issues.

Local government officials can make good use of lessons learned from the past. There is no need to reinvent the wheel when it comes to balancing public budgets in hard times.

The national pressure for cutback management began in the state of California a generation ago. At the time, I was both working for the city of Oakland, California, and preparing my doctoral dissertation. For my dissertation I chose the subject of coping with Proposition 13 because I had been assisting in developing the city's budget in response to the revenue reduction imposed by this citizens' mandate. The practices I learned from this experience, plus my other budget reduction experience that has been gained from serving in communities on both coasts of the United States since then, are reflected in this article.

Over the years, numerous budget development processes have projected, enhanced, and protected revenues; guided department managers and elected officials; and worked to ensure that public services were reduced only marginally, with the goal of balancing the annual budget in the most positive way possible.

Strategies, measures, tactics, and programs useful for today's public officials—both elected and appointed—are noted below. The purpose of presenting these options is to ensure that budget reduction practices and adoption processes are prudent yet optimize the use of existing revenue sources and make every effort to minimize the reduction of public services to citizens being served.

No new public services. During difficult financial times, there must be a policy of no new public services. No additional services should be added to the budget unless they are cost covering from a revenue standpoint. This means that, if user fees and charges cover the cost of providing the service, then it can be approved. If not, consideration of the service must be postponed until subsequent fiscal years. This is a fact of life when revenues are limited.

Implement a hiring freeze. One of the most obvious ways to save money is to impose an organization-wide hiring freeze. During these difficult financial times, elected officials early in the budgetary process should officially approve a hiring freeze. This creates immediate savings in salaries, fringe benefits, and other budget line items used in the provision of public services. Everyone should know that the elected officials are taking such action to avoid or at least minimize layoffs of employees and reductions of services later in the budget development process.

Form a union-management cost-savings committee. To balance public budgets, it is a positive measure to involve major stakeholders such as public unions in the process. The local government manager should meet with union representatives as appropriate (usually one member from each union) and ask for their cooperation in reviewing expenses and operations and in jointly recommending ways to save funds and avoid employee layoffs if at all possible. Asking elected officials for approval to form such a committee should have a positive effect because a message is being sent to citizens that both management and unions are involved in reducing the budget.

Update user fees and charges. Reevaluating the user-fee structure seems self-evident, but few cities and counties routinely update their user fees and charges for public services. Although the private sector updates prices annually because of increased costs, governments seldom perform this task with any regularity. User fees and charges should be updated to reflect the actual cost of providing the services rendered to the public. It is also appropriate to provide

discounts or free-use periods to selected citizens subject to the approval of their elected representatives.

Check existing enterprise funds. The national trend is to create enterprise funds in which the user fees and charges generated by the service make it cost covering. These funds are appropriate when only the users of a specific service benefit from its provision (sewer, water, arenas, stadiums, museums, golf courses, parking, and the list goes on). As budgets increase for such services, the user fees and charges should increase also, to ensure that the revenues cover the entire cost of providing the service. If discounts are approved for certain groups, user fees and charges must be increased for other citizens who use the service in order to offset this revenue loss.

Create other enterprise funds. After you check your existing enterprise funds, also review your government's public services to see whether other services should be set up in this manner. Sewer and water services have long been cost covering from a revenue standpoint, but other public services must be considered for enterprise fund status when they do not benefit the entire community. If a public service benefits only certain citizens, then those users should pay for the cost of the service. Funding for golf courses, arenas, stadiums, zoos, and museums is headed in this direction.

Use one-time revenues wisely. It is not usually fiscally prudent to use one-time revenues or budgetary savings to fund future operating expenses. The only sound financial practice is to use one-time revenues or budget savings to fund one-time expenses, both operating and capital, as appropriate and subject to the approval of elected officials. Using one-time revenues and budget savings to finance operating expenses merely exacerbates an organization's fiscal problems in the future.

Always seek available operational grants. Make sure that the staff is informed and knowledgeable about all existing grants from other levels and types of governments as well as appropriate nonprofit foundations. Every public agency should attempt to take advantage of all external funding sources for which it may qualify, including grants made available from nonprofit foundations. Most public libraries have reference books that list both regional and national nonprofit organizations and the programs for which they provide funding.

Optimize the use of available infrastructure grants. The federal government has made these grants available in the past under different administrations. When city and county managers know these funds are available, they should have their elected officials approve a projects list and start preparing plans and specifications to fast-track major projects that qualify for this funding. It is common for a local government to spend money up front to obtain engineering services in order to have important projects shovel ready when the grant funds become available. These project-related costs are often reimbursed subsequently by such grant programs.

Take measures to accommodate the truly needy. Elected officials and their staffs should not forget that, when public services are reduced and user fees and charges are increased, special consideration should be given to truly needy citizens. Special provisions, as defined and approved by elected officials, should be made for these residents. Modest user fees and charges, along with discounted charges that can include free use during low-utilization periods, are entirely appropriate during difficult financial times.

Consider employee work furloughs. The use of employee layoffs to balance a public budget should be a last resort. Efforts should be made to work with employee unions to avoid layoffs. One of the options available to save public funds and balance budgets is to have an employee work furlough. This requires selected employees to take time off for a number of days, up to a few weeks, typically staggered throughout the fiscal year, to reduce costs and minimize disruptions to public services. Elected officials usually favor this option because public services are not reduced substantially.

Avoid employee layoffs. Several options are available to save money, balance budgets, and avoid employee layoffs. Management and union representatives can agree to open labor negotiations to discuss various cost reduction and expense deferral options. Because governments basically deliver services, most of which are provided by people, public budgets are driven by salaries and fringe-benefit costs. All of these expenses can be reduced or deferred to avoid employee layoffs and severe service reductions. This is an appropriate option for major budget reductions.

Follow prudent bonding practices. The staff should recommend, and elected officials should approve, fiscally responsible bonding practices for all bond-funded public projects. Revenue bonds can be used to finance those projects with a solid revenue stream. General obligation bonds are typically used to finance public improvements and land acquisitions when no, or minimal, revenues are generated by these projects.

General obligation bonds are backed by the full faith and credit of the issuing government and have lower interest rates than revenue bonds. Public officials should also have established cost-limit policies for capital projects, land acquisitions, and major equipment purchases to qualify for bond financing. Also, some states provide bonding services to their local governments, which serves to aggregate purchases and thus provide lower interest rates for a bond issue.

Provide timely budget information to everyone. When reducing a public budget, make it a point to pursue all financial options to reduce operating costs and generate additional revenues. This means that all available operational and fiscal options should be listed and presented to elected officials for their review and consideration. It is entirely appropriate to start such budget review practices early during the fiscal year. This means that city and county managers should have their staffs prepare revenue projections early to allow time to work with department managers and employee unions to explore all service reduction, revenue enhancement, cost reduction, and expense deferral options.

Direct department heads to look for accrued savings. Early in a difficult fiscal year, a directive should be sent to all department managers asking them to review their approved budgets with the goal of holding down expenses, including employee-related expenses such as overtime as well as those operating expenses that can be reduced immediately without negatively impacting public services. Everyone should be told that this effort is being made to increase budgetary savings to offset the projected deficit for the coming fiscal year and to minimize possible future service reductions and employee layoffs.

Consider early retirement programs. Everyone agrees that senior employees cost more than entry-level employees. To the extent that an early-retirement program, such as a small pension incentive, can be offered to encourage senior employees to retire, it will save any public agency considerable funds in the future. New employees for most jobs start at the entry level, saving salary and fringe-benefit expenses. The hiring of new employees can also be deferred, if necessary. Early-retirement programs are considered a favorable expense reduction option by public unions and their employees.

Implement prudent financial policies. More public agencies should be approving prudent financial and budgetary policies, especially during these difficult economic times. This is a public and official way to give direction to all employees. Many local governments wait until there is a budgetary or financial problem before adopting financial policies.

Because of this, such policies sometimes tend to be problem-specific. Now is the time to proactively adopt sound fiscal policies. By doing this, public officials will give permanent direction to their staffs and mitigate the impact of future financial difficulties during the coming years. When such policies are established by elected officials, and approved publicly, they stay in place until they are changed by majority vote at a future public meeting.

Review existing funds for appropriateness. Periodically, when the annual audit takes place, the auditor and top management and financial staff should be requested to review all of the organization's funds, and their balances, for appropriateness. Some funds may have been established for a purpose that has been changed by subsequent circumstances or legislation.

The size of all existing funds should also be reviewed to ensure that the funds do not exceed the level desired when they were established. Any changes to existing funds, or their levels of funding, should be reviewed with elected officials and must be changed at a public meeting as a part of the budgetary process. Any excess fund balances, or funds no longer needed, can be transferred to the general fund to offset a potential financial deficit.

Rank public service levels. One of the greatest problems in reducing any budget is the highly political question of the relative value of various public services. Public services may be categorized into four service levels:

Level 1 comprises essential public services, which should not be reduced under any circumstances. Basic minimal levels of police, fire, health, and public works services fall into this category.

Level 2 comprises those programs that are highly desirable, but not absolutely essential.

Level 3 comprises the nice-but-not-necessary services that have significant value but do not provide essential or necessary services to the public.

Level 4 services can be described as the first-to-go programs because they are not essential and serve only a small portion of the community.

The criteria used to rank public services should be determined by elected officials as they consider budget reduction options.

Evaluate the impact of service-level reductions. To properly assess proposed service reductions, their relative impact on prevailing services must be determined. Many program reductions, because of existing personnel vacancies, may have no substantial impact on services; however, other service reductions may have a measurable impact. Four stages of service reductions can be used for this purpose:

Stage 1 reductions would reduce a substantial portion of a program or eliminate the program entirely.

Stage 2 reductions would reduce a sizable portion of a program but would not affect basic services.

Stage 3 reductions would reduce only a small portion of a program and not affect essential public services.

Stage 4 reductions would have little or no impact on prevailing public services.

Management can recommend such criteria, but elected officials determine the final rankings.

Prepare public service impact statements. Last but not least, before final decisions are made on reducing a government's budget, citizens should be informed of the impact that a monetary decrease has on the services selected for possible reduction. Each budget reduction proposed should come with a public service impact statement. This information should be provided with the list of proposed budget reductions given to elected officials.

The statement should also be made available to citizens at the public hearings and meetings held on budget reductions. If time permits, signs should be prepared and placed at those public facilities where services might be reduced. Public officials have an ethical obligation to properly inform the public of the operational impact of their financial and budgetary decisions.

There is no doubt that these are difficult financial times for local public officials who represent the citizens and manage

their organizations. All of these financial, budgetary, and operational choices are difficult to make, but they are a sign of the times. The sorting and prioritizing of public programs, and the rational reduction of government spending, form the most pressing challenge facing public officials today. Analyzing the political and administrative choices implemented by other local governments over the years will facilitate the use of orderly and sound options by today's public officials as they balance their communities' budgets.

These suggested guidelines are offered with the intention of providing insight and clarity to this arduous process. Budget reduction and revenue enhancement strategies that reflect responsibility, not only to the beneficiaries of public services but also to those who must foot the bill, must ultimately prevail.

Welcome to the difficult world of sorting out the relative value of public services and making sound financial and budgetary decisions so that public budgets are balanced to meet available revenues!

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