

LAYING THE FOUNDATION: FUNDAMENTALS FOR FIRST-TIME MANAGERS AND ADMINISTRATORS

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Tuesday, October 22, 2019

Session Overview

- Making you and your elected officials as effective as possible:
 - What to do pre-election, post-election and after
 - Building board as team
- Communication do's and don'ts
 - Social media, media relations and technology use
 - Budget transparency and civic engagement
- Resources:
 - Best practices and pitfalls to avoid
 - Publications and how ICMA can help
 - Group sharing—what works for you?
- Q&A

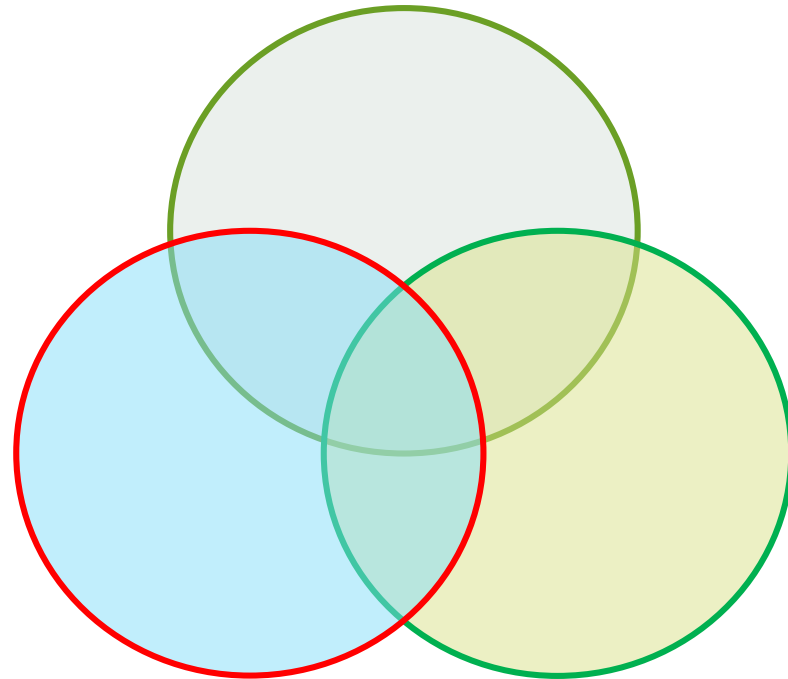


Remember....

Most managers get into trouble by failing to establish an effective and ongoing working relationship with the elected officials who are their appointing authority

Understanding Leadership

Positional Leadership



Legal Authority

Personal Influence

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Making your Board as Effective as Possible: Pre-Board/Council Election

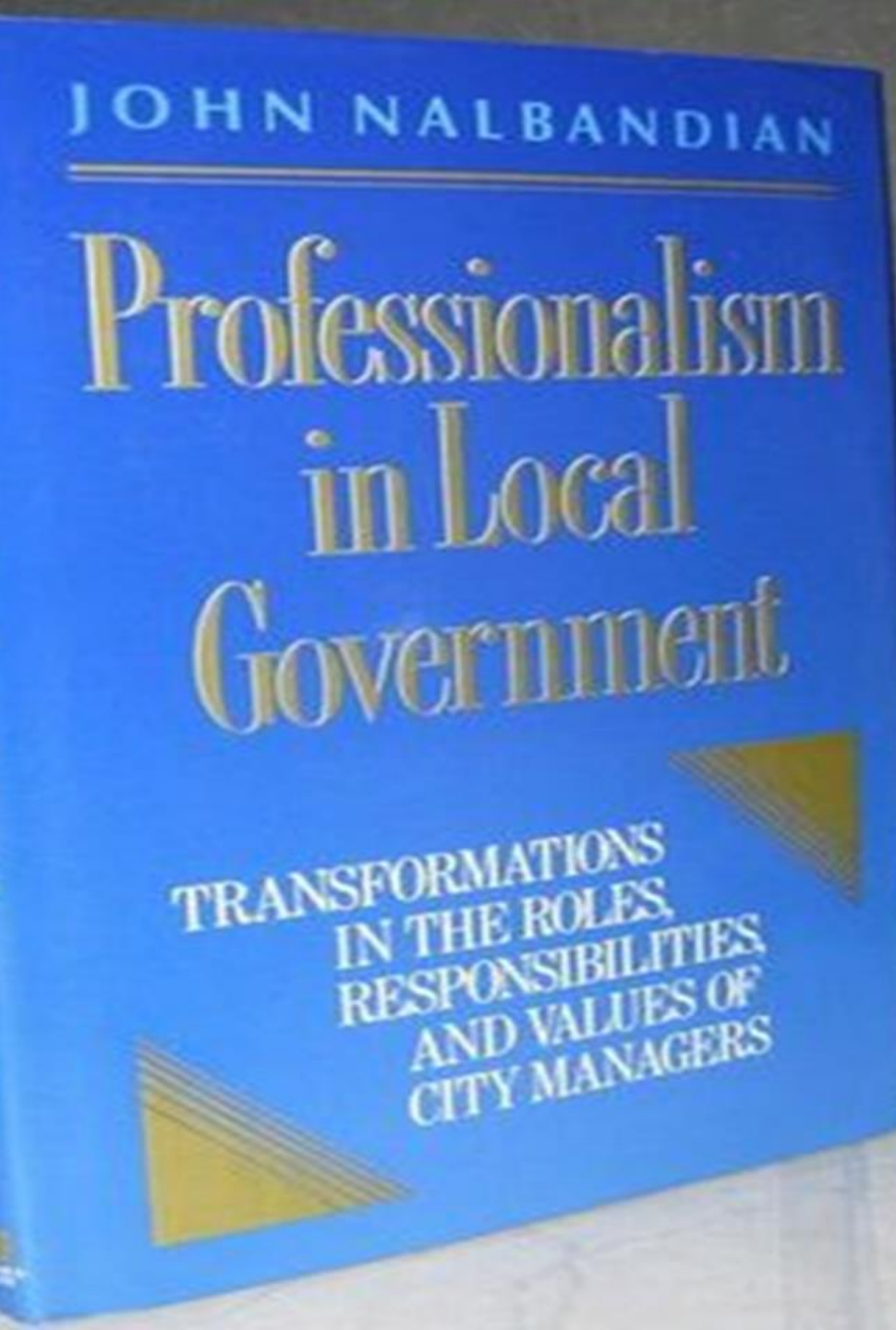
- Meet with candidates to provide information about the community; opportunity to understand their motivation for seeking office
- What is the protocol for staff/department head meetings with candidates?
- Seize opportunity to share what's been done, what is being worked on and future opportunities and challenges
- Be honest
- Be an equal opportunity information sharer with candidates

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Tenet 1

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

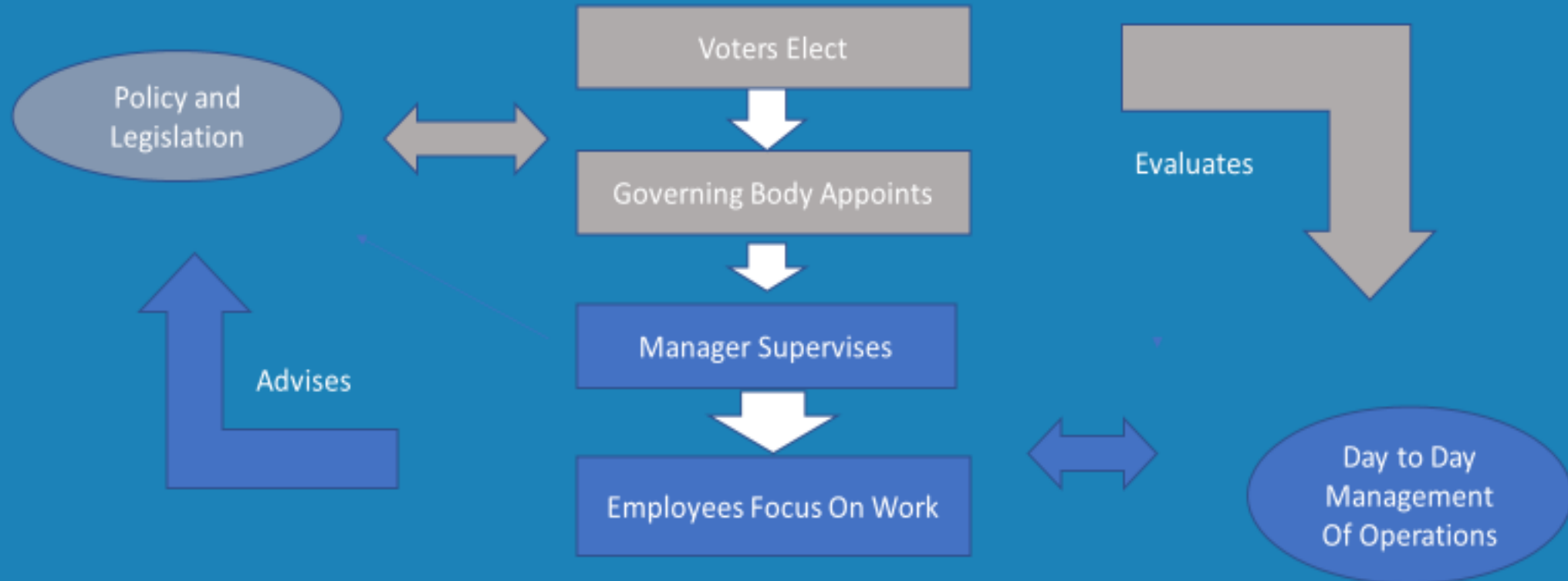


IMCA Managers Uphold
Democratic Values

Representation
Social Equity
Efficiency
Individual Rights

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Council Manager Government



Introducing ... you!

new board orientation

**Participate in a full day of learning for
newly elected board members.**

Learn the basics of board roles and responsibilities.

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Post-Election/Orientation

Be prepared: Compile a binder with a variety of information including your job description and employment agreement and ICMA Code of Ethics

Contents (include if not available with website/link)

- Charter/bylaws/ordinances, budget, annual reports, annual audit and management letter
- Board handbook, policies and practices, Do you use Roberts Rules of Order?
- Organizational chart
- Sample meeting packet/agenda, meeting minutes/annual reports
- Contact information for other members and yourself
- Collective bargaining agreements and employment agreements
- Goals/objectives and strategic plans: yours and the council/board's
- Conflict of interest/public records information, social media and technology use policies

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Orientation Cont.


- Arrange tour of all municipal facilities and an overview of their cost of operation
- Review budget in detail
- Operational policies review: council's role in adopting policies, strategic planning, voting and decision-making, appointments, evaluation of the manager
- Orientation is not a one and done. Should take place over several briefings

Helping Build Board as a Team – the Basics

- Each time new members come on board there should be an orientation for ALL members. Conveys that new members are now part of the team
- Chair sets the tone for civility, respect and meeting conduct
- Should not do work arounds from certain members
- Codes of conduct help set tone/expectations
- One member does not a board make. The council/board governs by majority
- Stay above the fray when personality conflicts arise; sometimes need to be a traffic cop

Remember, while elected officials are knowledgeable they rely on the administrator/managers to give them facts so they can make informed decisions. This means both positive and negative information and your own way of communicating it to build trust and respect

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Barriers to Successful Teams

- Adversarial - “I gotcha”
- Lose sight of strategic plan
- Micromanaging
- Don’t know what’s been done and nothing gets done
- Constantly veer off topic and not prepared for meeting
- Results in: lack of trust, demoralized staff, sends wrong message to public, bad council dynamics makes everyone look ineffective



Signs of a Successful Council/Board

- Comraderie/high energy/mutual respect
- Takes risks/not afraid to ask hard questions
- Shared responsibility, two-way communication
- Never lose sight of long-term vision
- They listen
- They stay in their lane
- Results in: trust from community and staff, you gets stuff accomplished, leads to creativity and innovation. Builds pride and retains talent

Communication Do's and Don'ts

Council members in general:

(It's all about trust)

- Always make time and be available; ask for preferred method of contact/communication for each member
- Share the same information with every member. Members need to be confident they are all treated equally
- Be clear about communication to and through members, department heads and support staff; especially important relative to public safety departments
- Be clear about the operational procedures in place to do the work of the community
- Be solicitous: what are their expectations about communication? Ask questions, is information helpful, can you do more?
- Always, always be respectful (keep your negative thoughts to yourself). Don't lose your cool or sensitivity.
- Lay the groundwork well in advance of your annual evaluation and/or contract renewal and when members change

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Communication Do's and Don'ts Cont.

At council/board meetings:

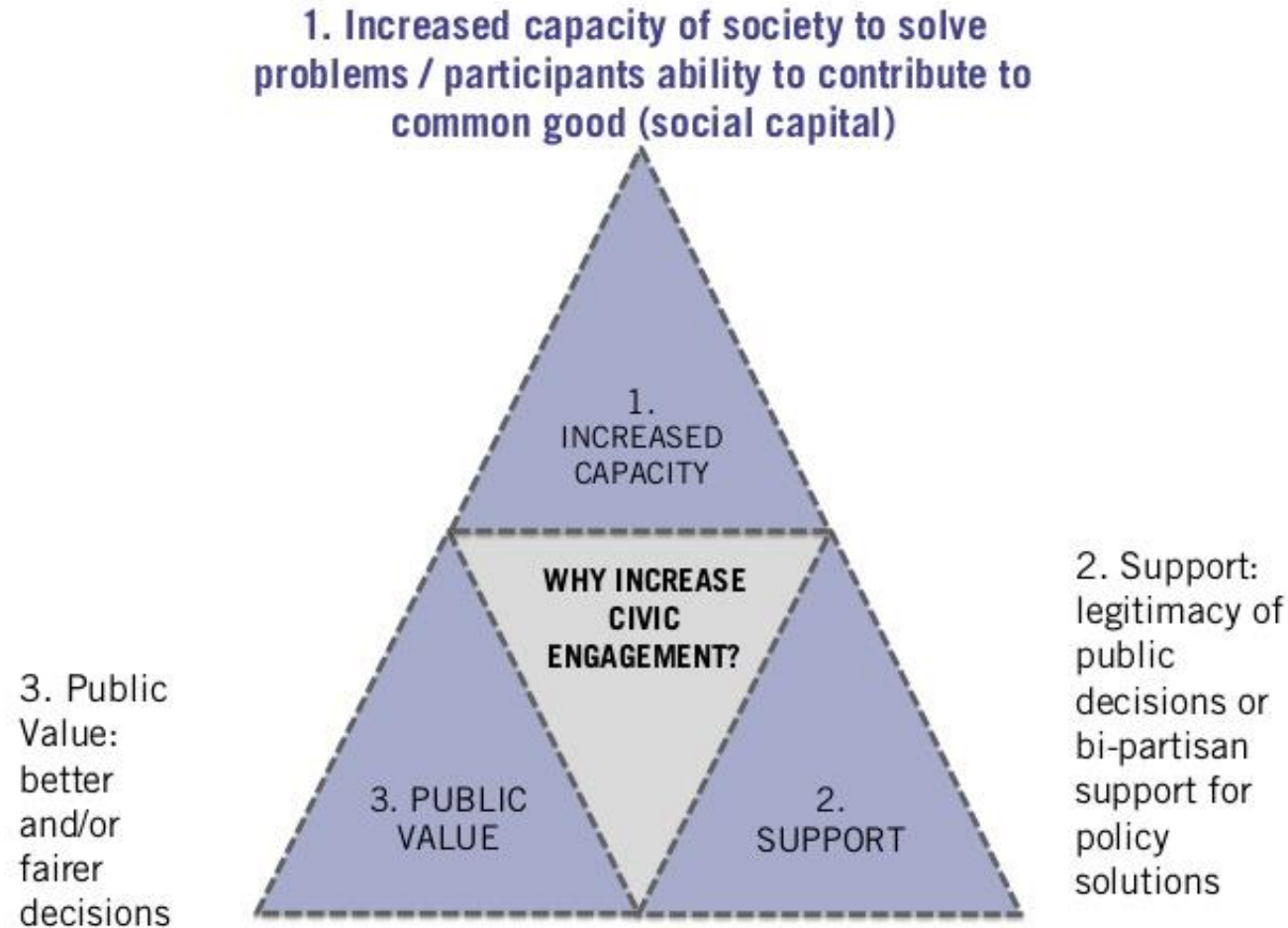
- Prepare a weekly report (verbal or written)
- Biweekly or monthly listing of items pending
- Listen
- Don't be afraid to say "I don't know, but I will find out and report back to you."
- (FYI: *Your blog is not communicating with your council*); *Don't get complacent!*

Communication with the public:

- Be factual, accurate, transparent and apolitical - credibility and trust is paramount
- Use clear language and technology to support ongoing communication such as newsletters or email or cable
- Be transparent in budgeting using concise language with recommendations, issues and priorities by department
- Listen, welcome feedback and value citizen input; some negative perceptions may have validity.
- Have a customer service policy

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Why citizen engagement matters





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Social Media Policies, Media Relations & Technology Use

Key questions to ask:

- Is there a written policy? (last updated? Include recent trends?)
- Whose in charge of and can post/release: website, Twitter, Facebook, Instagram
- Content, disclaimers, what happens when things go wrong? Are employees on notice?
- Are we reaching all citizens? Be aware of age and cultural differences



Media Relations: Do you have a policy?

- Press releases
- Who speaks for the community? The council?
- Beware of “off the record” comments and what that really means
- Be willing to orient uninformed reporters of municipal processes and decision-making
- Insist on accuracy and facts
- Suggest and submit positive community stories
- Don’t give press anything your council has not seen first



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Best Practices

Hold an annual retreat

Benefits:

- Discuss what is working and what isn't from 10,000 feet. You can't do everything; helps prioritize and bring into focus what is really important
- Strategic planning helps sets both short-term and long-term goals - crucial part of your job
- Discuss major issues and plan for the future in an informal setting
- Questions to ask:
 1. Where, when, how long?
 2. Should you use a facilitator?
 3. What is the relationship between council members?
 4. What is the relationship between the council and the administrator?

Best Practices Cont.

Have an employment agreement and method to evaluate your performance

Why?

- Outlines expectations and priorities
- Insures mutual understanding of job duties, roles and responsibilities
- Helps manage competing demands of what is to be accomplished (short-term and long-term)

Avoid surprises:

Ongoing discussions help nip issues in the bud

Be flexible; relationships change and so do expectations

Always ask:

“Is there something I can do to better serve you?”



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Pitfalls to Avoid

- Don't get caught—disparate treatment

Perception that one or more members is receiving more information or getting the “inside scoop”

Liking your boss is not a job requirement

- Never isolate yourself from a board member or stop communicating

Be sensitive to the warning signs of withdrawal or avoiding contact

- Keep your office in the office

Avoid fraternizing with council members outside work

- Don't assume confidentiality

The grapevine will defeat it

- Don't be a Debbie Downer

Try to find a way to solve the problem. Continually saying no has a pyramid effect



Pitfalls Cont.

- Maintain a healthy work/life balance, the work will be there tomorrow. Working long hours benefits no one.
- Pursue hobbies and leisurely activities - don't be afraid to say "I can't meet tonight or I am busy with my family."
- Don't ignore professional development opportunities to stay abreast of changes in the profession, network and recharge your batteries.
- Don't fall into the trap of thinking your community or board/council challenges are unique or unsolvable -they have happened elsewhere and there are people and resources to help you.
- "Managers advise, councils govern" - George Cuff - often perceived as one and the same and the ship can sink altogether.



- Be true to yourself and your own core values ... never go along to get along if it violates ethical conduct, appropriate charter or administrative responsibilities

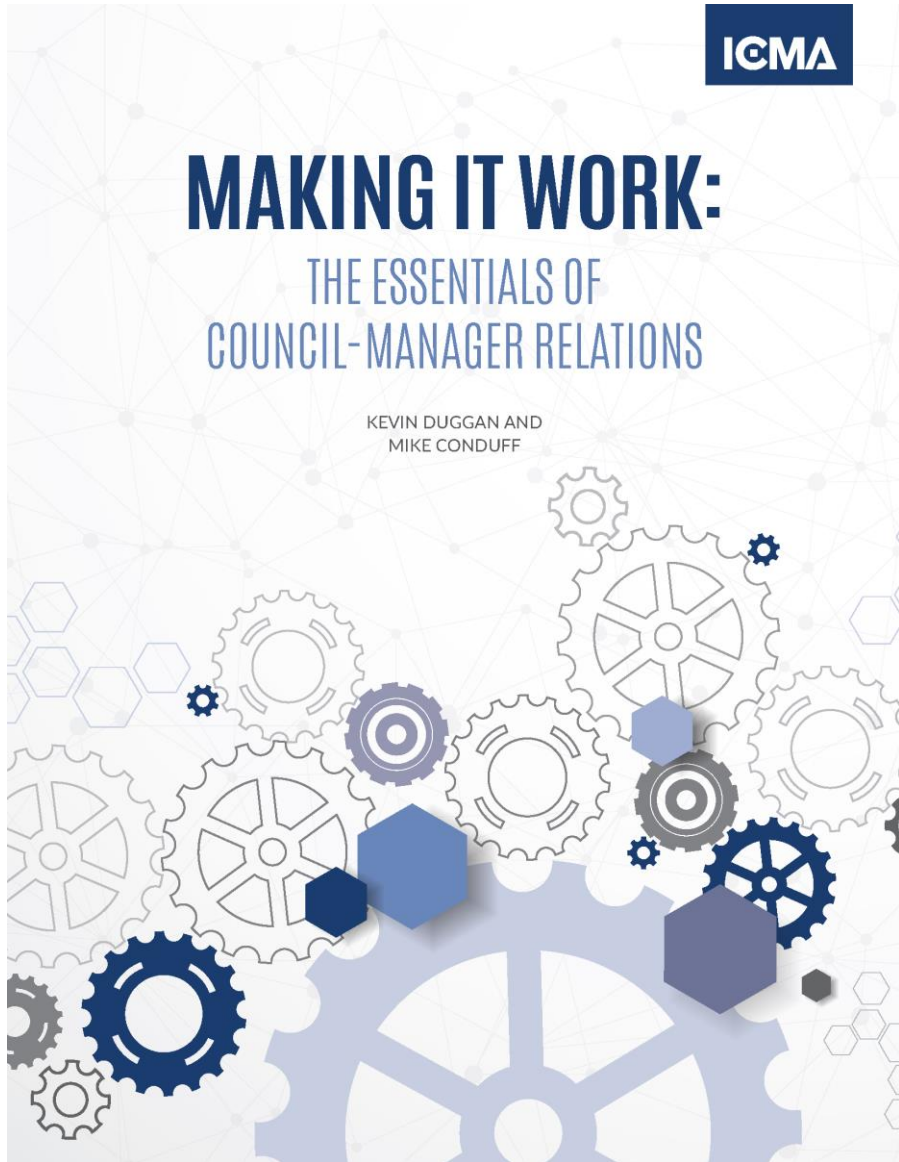


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- This is a rewarding but challenging profession, often compared to walking a tightrope. So remember that the **FEAR** of being fired or failure can be psychologically debilitating and worse than the event itself for your career.

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Resources to Help

- ICMA “Working with Elected Officials,” “Planning a Board Retreat,” ICMA “Strategic Planning”
- ICMA “First-Time Administrators Handbook” covers items that should be considered before accepting a position and before starting a new position
- ICMA “Manager Evaluations Handbook” resource for new or tenured professional manager to assist local elected officials in design of effective evaluation tool
- Model employment agreement: template for administrators for use in crafting the terms of hiring and employment
- “Making it Work: The Essential of Council-Manager Relations”
- ICMA Coaching Program and Coach Connect, ICMA webinars and ICMA Connect FTA Group



Questions and Comments

What “works” for
you?

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THANK YOU

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