

CALLAHAN'S CHECKLIST

How to Enter/How to Exit

Succession Planning

Iowa Municipal Finance Officers Association

October 17, 2024

Introduction Remarks & Observations

How you approach both an exit and an entrance for a position will depend upon the following:

1. The actual job or role in the city organization – city clerk, city administrator, deputy clerk, department head, etc.
2. The exit could be influenced by the reasons for your departure – retirement, new job, termination, etc.
3. The exit might also depend upon your opinion of the other “players” with the city and your reasons for departure.
4. These two lists of suggestions are neither exclusive nor all inclusive. You may not do all these things or you may add some ideas.

The “Entrance” to a New Job

1. Read ICMA Public Management publication – “Tips for the New Manager.”
2. Review key documents ASAP – city budget, recent audit, minutes, employee handbook, city code, job descriptions, comprehensive plan, CIP, and union contracts.
3. Meet with the elected officials one – on – one, ask questions, and just listen!
4. Meet with “key players” in the community – schools, businesses, local bankers, county officials, nearby cities, chamber, and newspaper.
5. “Follow the money” – Learn the sources of revenues and how the money is spent.
6. Get to know your fellow city employees and what they do.

7. Introduce yourself to the city board and commission members and thank them for volunteering.
8. Become familiar with the ongoing city capital projects and any unfinished policies, ordinances, and administrative tasks.
9. Schedule a tour of city facilities, buildings, and projects.
10. Get involved in the community – service clubs, churches, schools, etc. Attend some morning “coffee sessions” at the local café.
11. Walk the city neighborhoods in the evening, when weather permits.
12. Patronize local businesses whenever possible – be “visible.”
13. Provide weekly or bi-weekly updates to your boss on what you have accomplished and what lies ahead.
14. If you have any “financial concerns,” request an audit, as soon as possible.
15. Return calls and respond to emails on the same day.
16. Request some guidance on how your job performance will be evaluated – what are the expectations?
17. Find a good mentor from another city.
18. Keep any negative observations regarding council, city staff or citizens, to yourself, unless it is a fraud or theft issue. Assume that your “confidential comments” will “spread like fire.”
19. Be a team player and help others as needed.
20. Smile and have fun.....even if you are not.

The “Exit” From Your Old Job

1. Request an audit so that there is documentation of a “clean bill of health” of city finances upon your departure. If the city council declines, then document that YOU requested an audit.

2. Prepare a list of all documents, keys, passwords, and important “stuff” that you are returning. Get a witness and a signature.
3. Prepare a list of critical information for your successor – passwords, files, due dates, sources of information, resources, etc.
4. Prepare a list of unfinished tasks and projects that your successor will need to address along with realistic timelines for each item.
5. Request an exit interview with your boss and/or the elected officials. If appropriate, explain the reasons for your departure along with suggestions about how to improve the work environment. Be honest, sincere, polite, and professional.
6. Make yourself available after departure to answer questions and provide appropriate insight. Indicate the best days, times, and ways to contact you.
7. Show appreciation for the opportunity to have been employed by the city. Preferably end any final discussions on a positive note.
8. Never “burn your bridges.” Always assume the future potential employers will contact the people from your former city for personal reference.
9. Don’t be too critical of your previous city or your successor. It could come back to “haunt” you.
10. Lastly, don’t “look back.” Accept the fact that it is time to “turn the page” and move onto the next chapter in your life.

Patrick Callahan callahan.cmc@gmail.com
Callahan Municipal Consultants, LLC 563-599-3708

BY TOM DAVIDSON, STEVE OWEN, MARK PERKINS, DEBORAH ROBERTS, ANTHONY ROMANELLO, RANDY WHEELER, AND DAVE WINTER

TIPS FOR THE NEW MANAGER

Veterans share wisdom

When Jason Tyree, a graduate student who worked for the city of Lynchburg, Virginia, was appointed town manager of Buchanan, Virginia, in 2018, it was his first management position. Some of us who are working in local government positions decided to collaborate on advice we could give him as he started his new job.

We gave him this assembled intel and thought it also might be of interest to other newly appointed managers:

Things to Do in the Beginning

Meet with each elected official one-on-one and ask:

- What are the great challenges the community is facing or will face in the near future?
- Why are we facing these challenges?
- What are the most promising unexploited opportunities?
- If you were me, where would you focus your attention?
- What makes you proud about your community?
- What made you run for office?
- What are your individual priorities? [When these are realized, celebrate “checking them off the to-do list” with elected officials.]

Meet with key players in the community, including business leaders; county administrator (or if there are other incorporated towns in the county or in the region, meet with your counterparts); planning district commission director; head of pastoral council; tourism groups; local newspaper reporter; and chamber of commerce.

Ask elected officials for recommendations to add to this list, too. Meet these

leaders in their own workplaces—they will appreciate this, and you’ll see their environments firsthand.

Understand the money, and do this quickly. Get into the community’s budget and the audit quickly. Know how the money works in the community.

Meet as often as you can with key staff members. Remind them frequently of the big picture and the council’s priorities for the community and staff. Establish key expectations that you have of staff members and that they can have of you.

Take every opportunity you can to speak in the community and attend community events.

Ask a lot of questions and then listen—with both your ears and your eyes.

Smile and have fun. You’ve made it, so enjoy it.

Things to Remember

You’re neither staff nor an elected official. You’re the chief administrative officer. Yes, your community might be a small town and you’re going to do a little bit of everything, but fundamentally you are charged with delivering on the will of the people’s elected representatives.

Don’t lose sight of the big picture. You’re now more conductor than musician, more architect than builder.

Before you do something, ask yourself, “Am I the only one in this organization who can do this?” If the answer is “yes,” do it well. If the answer is “no,” delegate it. This question will



help you stay focused and give your community’s staff good opportunities for professional growth.

Return councilmember calls and e-mails the same day they are received. If a staff member takes a councilmember call for you and you are in a meeting, make sure staff asks if the councilmember wants to interrupt you.

Also, when receiving weekend e-mail and voice-mail messages from board or councilmembers, one of us had the practice of acknowledging them on Monday morning, unless the matter was pressing.

Another colleague suggests turning off e-mail entirely on nights and weekends and letting councilmembers and senior staff know they can text or call you during those times. This will help with work-life balance and being present with your family during non-work hours. (A number of us wish we had done this.)

If you call an elected official on a landline phone and there is no answer, just leave a message for the person to call you back. Don’t even think about telling the spouse/partner why you called or leaving all that on voice mail. Partners probably don’t care. If they do, you might have bigger problems.

Prepare a weekly report to elected officials and copy your senior staff.

Keep any negative thoughts about elected officials to yourself.