Succeeding as a Supervisor or Manager -- webinar
2:00 – 3:30 p.m. PT, Wednesday, February 22, 2012
Cal-ICMA Coaching Program

*** Advance registration required for this no-charge webinar:
https://www1.gotomeeting.com/register/650965400

Is a supervisory or management role for you? What does it take to succeed?

Topics:
1. For whom is a management role a fit and for whom isn't it? How can people considering a supervisory or management role figure out if it's right for them?
2. What's key to making the shift from employee to supervisor? How do you handle the dynamics of becoming a supervisor of people who may have been your co-workers?
3. How do you hone your management skills to advance to a division manager or department head position? What are the key factors for success?
4. What's needed to become an effective city manager or county administrative officer? How do you handle the shift from a number two position to the lead role?
5. For each level of management, what are useful strategies and resources to make the transition and enjoy the role?
6. How are up and coming managers reshaping the role of management and approach to working with employees, other organizations, and the communities they serve?

Presenters:
* Sean Matlock, Community Services Manager, Brea
* Ryan DeVore, Chief Building Official, Sacramento
* Jeff Maltbie, City Manager, San Carlos

We'll be using webinar tools (including real-time questions and live polling) to make this a great opportunity for audience interaction.

Target audience: all supervisors, managers, and employees aspiring to those positions

1. Register in advance for the webinar:
There is no charge for participating in the webinars, but each requires advance registration.
*** Advance registration required for this no-charge webinar:
https://www1.gotomeeting.com/register/650965400

2. Pick your audio option:
a. use the VOIP or dial-in number provided by GoToWebinar with your registration. If you use the dial-in number (which is better for sound quality), you will pay whatever your regular telephone carrier charges are for the call.
OR
b. access live audio via the web [powered by Granicus]—As an alternative to the VOIP or GoToWebinar dial-in number, you can listen to live audio at the "Live Audio and Archives" tab of www.cal-icma.org/coaching. If you choose to use the live audio via the web, please check that web page in advance to ensure that you have the appropriate software installed.

3. Ask questions:
You may submit questions anonymously via email to cal-icma@DonMaruska.com either in advance or via the webinar during the panel discussion. As moderator for the session, Don Maruska will pose the questions.

4. Presenters’ presentation materials:
We post these with the agenda at “Live Audio & Archives” tab of www.cal-icma.org/coaching. The PPT will be available about 2 hours before the webinar.

After a webinar occurs, a digital recording along with the PowerPoint materials and results of the polling questions will be available within 24 hours at the "Live Audio & Archives" tab of www.cal-icma.org/coaching.

Post-Webinar Group Discussions

Many agencies are organizing groups to participate in the webinars (live or recorded) and discuss the topics among themselves after the webinars. Some are summarizing their discussions and distributing them to managers throughout their organizations. Use the Cal-ICMA Coaching Program as an effective way to enhance professional development in your agency. Here are some discussion starters for this session.

1. What’s key to being a successful supervisor in our agency?
2. What’s needed to advance into a division manager or more senior management position?
3. What resources are available to support people who are in or are aspiring to these roles?

MORE RESOURCES--See the "Coaching Corner" at www.cal-icma.org/coaching for valuable resources to boost your career. Sign up for the complimentary email list to keep informed of future sessions and resources at www.cal-icma.org/coachingList.

We appreciate the sponsors for the Cal-ICMA Coaching Program. They include:
Platinum Sponsors: CA Communities Joint Powers Authority, Pacific Gas and Electric Company, and Chevron
Gold Sponsor: California City Management Foundation
Silver Sponsors: California Redevelopment Association, Colorado City and County Management Association, County Administrative Officers Association of California, Municipal Management Association of Northern California (MMANC), Public Agency Retirement Services (PARS), and Granicus
Bronze Sponsors: California Special Districts Association, Carl Warren & Company, County Personnel Administrators Association of California (CPAAC), Davenport Institute
for Public Engagement at Pepperdine’s School of Public Policy, Liebert Cassidy Whitmore, Municipal Management Association of Southern California (MMASC), and Stone and Youngberg

Enjoy the resources and support to thrive in local government.

Don Maruska, Master Certified Coach
Director, Cal-ICMA Coaching Program
See "Coaching Corner" at www.cal-icma.org/coaching

Sean Matlock, Community Services Manager, Brea

Sean Matlock began working for the City of Brea in 1987 as an Administrative Clerk. Within a short time, he realized that he found a career in local government. Sean worked in a variety of positions in the Personnel Department for the next 18 years. Looking for some new challenges, Sean was promoted to Senior Management Analyst for Community Services in 2006. Sean's current position is Community Services Manager where he oversees the Brea Community Center, Sports Park, Special Events and the Brea Plunge. His educational background includes a BA in Business Management/Human Resources and an MPA, both from Cal State Fullerton.

See attached articles that Sean recommends.

Ryan DeVore, Chief Building Official, Sacramento

Ryan has over 12 years of diversified experience in Civil Engineering and Community Development. His work in the private sector includes the design of buildings, bridges, roads, and land development. Ryan currently serves the City of Sacramento as the Chief Building Official.

Suggested references from Ryan:

MMANC/MMASC Credentialed Government Leader (CGL) Program:
**Books:**
Outliers
Tipping Point
Now, Discover your Strengths
How to Win Friends and Influence People
The Art of Getting Things Done
What Color is your Parachute?
Good to Great
To Do or Not To Do: How Successful Leaders Make Better Decisions
The One Minute Manager
Management Time: Who’s got the Monkey? (HBR Article)
The 7 Habits of Highly Effective People
Effective Local Government Manager, Charldean Newell, editor, ICMA Press
http://bookstore.icma.org/BestSeller_P1228.cfm

The Franklin-Covey Planner (and Associated Time Management Course)

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**Jeff Maltbie**, City Manager, San Carlos

Jeff joined the City of San Carlos in 2001 as a Senior Analyst in the City Manager’s Office. During his 11 years with San Carlos he went on to serve as Deputy City Manager before becoming the City’s first Administrative Services Director. As the Administrative Services Director he was responsible for all the City’s business operations including Finance, Human Resources, Information Technology and Risk Management. Jeff began serving as the San Carlos City Manager in September of 2010. Jeff is a graduate of the Inter-Governmental Management Training program (IGMT), has served as the Chair of the ABAG Plan Board of Directors, the Bay Area ERS Board of Directors and is a past President of MMANC. In addition, Jeff serves on the League of California Cities – City Manager’s Committee on Transparency in Government and the IEDA Board of Directors. Jeff attended San Diego State University and San Jose State University earning a Bachelor’s of Art degree in Political Science/Public Administration. Prior to coming to San Carlos Jeff worked for the City of Daly City, Santa Clara County, and the City of Milpitas.
Succeeding as a Supervisor or Manager

Coaching Program
February 22, 2012
Coaching Program: 9th year
Preparing the Next Generation Committee

Platinum Sponsors: CA Communities Joint Powers Authority
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Gold Sponsor: California City Management Foundation

Silver Sponsors: California Redevelopment Association, Colorado City/County Management Association, County Administrative Officers Association of California, Granicus, Municipal Management Association of Northern California, and Public Agency Retirement Services (PARS)

Bronze Sponsors: California Special Districts Association, Carl Warren & Company, County Personnel Administrators Association (CPAAC), Davenport Institute for Public Engagement at Pepperdine, Liebert Cassidy Whitmore, Municipal Management Association of Southern California, and Stone and Youngberg
Polling Question #1

How many people are participating at your location?
Overview of Session

1. For whom is a management role a fit and for whom isn't it? How can people considering a supervisory or management role figure out if it's right for them?
2. What's key to making the shift from employee to supervisor? How do you handle the dynamics of becoming a supervisor of people who may have been your co-workers?
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6. How are up and coming managers reshaping the role of management and approach to working with employees, other organizations, and the communities they serve?

- **Sean Matlock**, Community Services Manager, Brea, CA
- **Ryan DeVore**, Chief Building Official, Sacramento, CA
- **Jeff Maltbie**, City Manager, San Carlos, CA
- **Don Maruska**, Director, Cal-ICMA Coaching Program

…and polls and questions along the way.
Polling Question #2

Where are you in your career (check all that apply in your audience)?
Succeeding As A Supervisor or Manager

Sean L. Matlock
Community Services Manager
City of Brea
My Road to Becoming A Manager

- Building Relationships
  - Internal/External Customer Service
  - “Working Groups”
- Commitment to Learning
How Do I Prepare for My Next Position?

- Networking
- Important Skills:
  - Leadership
  - Communication
  - Writing
  - Presentation/Public Speaking
Internal Opportunities

- “Thinking Out of the Box”
  - Cross Training
  - Special Projects
- Mentoring
Managerial Leadership

- Motivate
- Inspire achievement
- Deal with change
- Work on the system
- Create opportunities
- Seek opportunities
- Provide a vision to believe in
- Coach followers, create self-leaders and empower them
“I will prepare and some day my chance will come.”

Abraham Lincoln
Polling Question #3

Which of the following do you particularly want to explore to enhance your management?
Succeeding as a Supervisor or Manager

Ryan DeVore, PE, MBA
Chief Building Official, City of Sacramento
February 22nd, 2012
Outline

• Self-reflection
• Preparation
• Compete
• Continuous growth
• Enjoy
• Summary
Self-reflection

• The right fit. Do you really want to be a manager?
  – Are you comfortable making decisions?
  – Are you comfortable confronting staff on their performance?
• Self assessments
• Read personal growth books
• Ask yourself this question: “What is really important to me?”

Just do it

“I am always doing that which I cannot do, in order that I may learn how to do it.”
Preparation

• Discuss your aspirations with your family
• Know where you want to go and what the job requirements are
  – Education, skills
• READ about successful leaders and organizations
• Find a few mentors
  – ASK for help
• Network
  – Linkedin, Industry associations, Customers

Work, work, work

“Continuous effort, not strength or intelligence, is the key to unlocking our potential.”
Compete

• Take ALL opportunities that offer growth toward your goals
  – Once you find the right job, fight for it
  – Doesn’t have to be perfect. Look for a broad skill fit
  – Develop breadth, not depth
• Be known for making tough decisions and taking responsibility
• Fix problems
• Know more about your work than anyone else

Go get it
“Challenge yourself a little more each day.”
Continuous growth

• Find uncomfortable situations and test yourself
  – This presentation
  – Presentations to city council
• Be a good supervisor
  – Learn to delegate effectively
  – Take care of good people and discipline the poor performers
• Read & Network

Keep at it

“Don’t do nothing because you can do just a little. Do what you can.”
Enjoy

- Don’t be afraid to ask questions
- Find an outlet
  - Basketball, Triathlon, Guys night
- Make time for your family
- Slow down and enjoy success
- Find something else if you aren’t enjoying yourself

Have fun

“You take your fun with you.”
Summary

1. Know yourself and your values
2. Set goals and that align with your values
3. Commit to achieving those goals
4. Read and find mentors
5. Network
6. Compete for what you want
7. Make decisions and solve problems
8. Take responsibility
9. Never stop learning
10. Have fun
Polling Question #4

Which areas will most help you advance in your management success?
Are You Prepared For Your Next Seat?

Jeff D. Maltbie
City Manager
City of San Carlos
What’s it take to become a City or County Manager?

- Handling high risk, high pressure situations
- Broad perspective & understanding of issues
- Strong organizational & time management skills
- Consistent, defined yet adaptable management process
- Excellent communicator, facilitator, listener, negotiator
- Leadership & diplomacy
- High ethical standards
They don’t call it the “Honeymoon Period” for nothing

- Bring respect on Day 1
- Ask questions, listen, learn and communicate expectations clearly
- Step up, take charge & be decisive
- Pick your issues – you can’t do it all
- Flexibility – The best laid plans can & do go wrong

Success Equals: Strong Relationships, **TRUST**, in your organization, community & profession
21st Century Management: It turns out, the future is now

- Large shifts are occurring in communities which haven’t been seen since the 1970’s, early 80’s
  - Major demographic changes
  - Financial & housing turmoil
  - Government Reform
  - Communication at the speed of light
  - Expectations & trust issues
- Need for more creativity & risk taking
- Greater planning and preparation for the future
Polling Question #5

Which of these executive leadership skills need the most attention in today's environment? [pick top 3]
Contacts for Today’s Session

- **Sean Matlock**, Community Services Manager, Brea, CA; SeanM@cityofbrea.net
- **Ryan DeVore**, Chief Building Official, Sacramento, CA; RDeVore@cityofsacramento.org
- **Jeff Maltbie**, City Manager, San Carlos, CA; JMaltbie@cityofsancarlos.org
- **Don Maruska**, Director, Cal-ICMA Coaching; Cal-ICMA@DonMaruska.com
Polling Question #6

How was the webinar of value to you?
Collaboration with Other ICMA State and Regional Associations?

Some opportunities:
1. Plug into proven infrastructure to serve you.
2. Suggest topics and invite volunteer presenters for participation in co-sponsored webinars.
3. Use template for state Coaches Gallery.
4. Use template for speed coaching at association and area managers’ meetings.
5. Customize with your own YouTube channel.

share your thoughts on the post-webinar survey.
Upcoming session

Better Budget Models

Cal-ICMA and CSMFO Coaching Programs
2:00 – 3:30 p.m., PT, Thursday, April 12

Registration is now open:
https://www1.gotomeeting.com/register/764022472
Resources and Feedback

Go to “Live Audio & Archives” tab at web sites for recordings of this webinar and other professional development resources.

www.cal-icma.org/coaching

Please complete the follow up survey.

Follow us online
Leadership vs. Management
Kristina G. Ricketts, Community and Leadership Development

The terms “leadership” and “management” are seen very differently by diverse people. Some individuals see these terms as synonyms and frequently use them interchangeably throughout phrases and sentences. Others approach them as extreme opposites; so extreme, in fact, that they would argue that you cannot be a good manager and a good leader at the same time. Still other people reside somewhere in the middle and realize that while there is a difference between leadership and management, with the right knowledge an individual can successfully navigate both from the same position.

Today’s groups, organizations, and teams need both effective leaders and effective managers to run a successful operation. While some obvious similarities (i.e. they both involve influencing constituents or employees; authority and power are generally given with both positions) can be found between leadership and management, there are also some striking differences (i.e. management is often more task-oriented; leadership is often considered more inspirational and visionary). For the purposes of this publication, leadership and management are defined somewhat differently; nonetheless, it is still understood that one person can work efficiently in mastering both fields.

In this document, we will address fundamental definitions of leadership and management, behaviors consistent with effective leadership and management, and the specific types of skills that contribute toward effective management. To conclude, a table will compare and contrast the major components within each field. Ideally, with the right training and development, anyone can successfully navigate the fields of management and leadership.

Leadership
For a quick review, the definition of leadership is a process whereby an individual influences a group of individuals to achieve a common goal.

Breaking this down even more, while there are a variety of leadership definitions out there, there are specific components that are central to the majority of these definitions. Leadership:

- Is a process
- Involves influence
- Occurs in a group context (you need to have at least one constituent)
- Involves goal attainment

No matter how you operationalize leadership, these components play some small role in the definition or theory utilized.
Leadership Characteristics

As illustrated in Competent Leadership: What Effective Leaders Do Well (ELK1-101), some common characteristics and behaviors of effective leaders are as follows:

- Efficient coaching skills
- Confidence
- Consistency between word and action – “walking the talk”
- Creativity
- Empathic listening skills
- Being visionary
- Inspiring
- Long-term focus
- Maintaining a balance between individual needs and team needs
- Awareness of realistic conditions
- Strong self-esteem
- Sense of priorities
- Service mentality
- Sincerity
- Technical or contextual expertise
- Trust
- Willingness to share responsibility
- Willingness to share credit or recognition

It is important to keep these leadership characteristics (found in the left-hand column) in mind while you continue reading the sections on management. Which of these leadership characteristics should also be found in good managers? List your top five choices on the lines below:

1. ____________________________________________
2. ____________________________________________
3. ____________________________________________
4. ____________________________________________
5. ____________________________________________

Management

For most, the definition of management is seen quite differently. This doesn’t mean that an individual can’t hold both management and leadership responsibilities simultaneously, but management is considered a term separate from leadership. The definition of management is to exercise executive, administrative, and supervisory direction of a group or organization.

Leadership and management share many similarities. Both leadership and management involve influence, working with people, and working with effective goal management. However, the fields of leadership and management can also be considered very different. According to John Kotter, leadership can be considered an age-old concept that has been around for centuries, while management is a concept developed in the last 100 years, in part from the rise of the industrial revolution. Many other scholars share Kotter’s viewpoint in differentiating between management and leadership:

- Bennis and Nanus define management as accomplishing activities and mastering routines; to lead means to influence others and create visions for change.
- Rost asserts that leadership is a multidirectional influence relationship; management is a unidirectional authority relationship.
- Zaleznik argues that management and leadership require different types of people

Still there is an overlap between the two fields; when managers are involved in influencing a group of employees to meet its goals, they are operating under leadership. In addition, when leaders are involved in aspects such as planning, organizing, staffing or controlling, they are operating within management. So while we are spending the majority of this publication distinguishing between leadership and management, suffice it to say that while different, they may never be completely separate.
**Essential Management Skills**

Because management responsibilities are generally much more task-oriented than some leadership responsibilities, one important way to operationalize effective management is to discuss necessary skills. Skills are different from traits or characteristics in that they are the ability to use one’s knowledge and competences to accomplish a set of objectives. Effective administration depends upon three personal skill sets: technical, human and conceptual. The following is a discussion of each:

- **Technical skill**: knowledge about and proficiency in a specific type of work or activity. This may include competencies within a specialized field, analytical ability, or the ability to use appropriate tools and techniques. A good example of this is the knowledge of software language and programming, the company’s software products, and how to troubleshoot for clients when working for a computer software company.

- **Human skill**: knowledge about and ability to work with people, often considered “people” skills. These skills allow a manager to assist group members when working cooperatively as a group to achieve a task or assignment. Examples of this group of skills include being aware of one’s own perspective on issues as well as your employees’ perspectives, knowing the needs and motivations of your staff, and taking into account others’ needs during decision-making.

- **Conceptual skill**: the ability to work with ideas and concepts. This skill set doesn’t involve working with people or things, but focuses on ideas. A manager with good conceptual skills will be comfortable talking about the ideas and details that shape their group or organization. He or she is good at seeing the bigger picture and can translate this understanding into words everyone understands.

Each of these types of skills is important for effective management, and are necessary within different levels of management within a group or organization. Not surprisingly, many of these skills are also useful for effective leadership, generally within a slightly different context.

**Management vs. Leadership**

So how does one distinguish between leadership and management? In Table 1 below you will see a direct comparison between leadership and management activities. An individual can be a great leader, a great manager, or both, but each area requires the mastery of slightly different skills and competencies.

**Table 1. A Comparison of Management and Leadership Competencies.**

<table>
<thead>
<tr>
<th>Management Produces Order &amp; Consistency</th>
<th>Leadership Produces Change &amp; Movement</th>
</tr>
</thead>
<tbody>
<tr>
<td>Planning and Budgeting</td>
<td>Establishing Direction</td>
</tr>
<tr>
<td>Establishing agendas</td>
<td>Creating a vision</td>
</tr>
<tr>
<td>Setting timetables</td>
<td>Clarifying the big picture</td>
</tr>
<tr>
<td>Allocating resources</td>
<td>Setting strategies</td>
</tr>
<tr>
<td>Organizing and Staffing</td>
<td>Aligning People</td>
</tr>
<tr>
<td>Provide structure</td>
<td>Communicating goals</td>
</tr>
<tr>
<td>Making job placements</td>
<td>Seeking commitment</td>
</tr>
<tr>
<td>Establishing rules and procedures</td>
<td>Building teams and coalitions</td>
</tr>
<tr>
<td>Controlling and Problem Solving</td>
<td>Motivating and Inspiring</td>
</tr>
<tr>
<td>Developing incentives</td>
<td>Inspiring and energize</td>
</tr>
<tr>
<td>Generating creative solutions</td>
<td>Empowering subordinates</td>
</tr>
<tr>
<td>Taking corrective action</td>
<td>Satisfying unmet needs</td>
</tr>
</tbody>
</table>


With the mastery of each of these skills and behaviors, one can successfully navigate the fields of both management and leadership. It is usually just as simple as knowing what context is most appropriate to the situation and applying oneself in a leadership or management capacity.
Step Out & Apply

Refer to the table on page 3 and apply what we have learned to your own situation by filling out the questions below.

Are the activities I am currently performing within my job/volunteer position/organization more leadership or management oriented? Why?

________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

Do I want more leadership/management oriented responsibilities? If so, how do I go about taking on/requesting more responsibilities? Outline an action plan here:
1. ______________________________________________________________________
2. ______________________________________________________________________
3. ______________________________________________________________________
4. ______________________________________________________________________

Do I wish my management/leadership responsibilities were reduced? If so, how can I delegate some responsibilities to other able individuals? Outline an action plan here:
1. ______________________________________________________________________
2. ______________________________________________________________________
3. ______________________________________________________________________
4. ______________________________________________________________________

What leadership competencies do I need to work on to be the best leader I can be? ____________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________

What management competencies do I need to work on to be the best manager I can be? ____________________________
________________________________________________________________________
________________________________________________________________________
________________________________________________________________________
References & Background Reading
Polling Results from “Succeeding as a Supervisor or Manager” – webinar
February 22, 2012
Locations participating: 381; Estimated total live audience (including groups): 950

<table>
<thead>
<tr>
<th>Question</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>How many people are listening on your line?</td>
<td>74%</td>
</tr>
<tr>
<td>16% 2-5</td>
<td>6% 6-10</td>
</tr>
<tr>
<td>3% 11-20</td>
<td>1% 21 or more</td>
</tr>
<tr>
<td>Where are you in your career (check all that apply in your audience)?</td>
<td></td>
</tr>
<tr>
<td>39% employees considering supervisory roles</td>
<td></td>
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<tr>
<td>30% new supervisors interested in ideas to enhance results</td>
<td></td>
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<tr>
<td>32% supervisors considering movement to mid-management</td>
<td></td>
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<tr>
<td>33% senior managers or staff thinking about executive leadership</td>
<td></td>
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<tr>
<td>13% other</td>
<td></td>
</tr>
<tr>
<td>Which of the following do you particularly want to explore to enhance your management?</td>
<td></td>
</tr>
<tr>
<td>54% building relationships</td>
<td></td>
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<tr>
<td>50% networking to expand my horizons and perspectives</td>
<td></td>
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<tr>
<td>55% thinking outside of the box to find opportunities</td>
<td></td>
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<tr>
<td>70% boosting my tools to inspire and guide a team</td>
<td></td>
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<tr>
<td>59% gaining coaching or mentoring to support my growth</td>
<td></td>
</tr>
<tr>
<td>Which areas will most help you advance in your management success?</td>
<td></td>
</tr>
<tr>
<td>47% self-reflection</td>
<td></td>
</tr>
<tr>
<td>74% preparation</td>
<td></td>
</tr>
<tr>
<td>38% compete</td>
<td></td>
</tr>
<tr>
<td>81% continuous growth</td>
<td></td>
</tr>
<tr>
<td>40% enjoy</td>
<td></td>
</tr>
<tr>
<td>Which of these executive leadership skills need the most attention in today’s environment? (pick top 3)</td>
<td></td>
</tr>
<tr>
<td>47% handling high risk, high pressure situations</td>
<td></td>
</tr>
<tr>
<td>42% strong organizational and time management skills</td>
<td></td>
</tr>
<tr>
<td>88% communication, facilitation, listening and negotiation</td>
<td></td>
</tr>
<tr>
<td>68% planning and preparation for the future</td>
<td></td>
</tr>
<tr>
<td>64% leading with high ethical standards</td>
<td></td>
</tr>
</tbody>
</table>