



**A GUIDE TO PARTICIPATING IN THE
NATIONAL CERTIFIED PUBLIC
MANAGER[®] CONSORTIUM**

**STANDARD OPERATING PROCEDURES
OF
THE NATIONAL CERTIFIED PUBLIC
MANAGER[®] CONSORTIUM**

MARCH 2009

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Introduction

Purpose of this Manual. This manual contains the *policies and procedures* that are applicable to the operation of the National Certified Public Manager® Consortium and its members. It provides criteria, guidelines, and procedures necessary to carry out the Consortium's business and operations. This is a dynamic document that should reflect continued changes and improvements in the organization. It is a reference containing critical information for operations as well as non-critical information and templates that will assist Consortium members in carrying out business effectively and efficiently.

Revisions. It is the responsibility of a Member-at-Large on the Executive Council to maintain the Standard Operating Procedures Manual. This shall include all changes to the policies and procedures resulting from Consortium business meetings as well as changes to the Constitution and Bylaws. Revisions will be marked by date in the document title page and on each page's header. The Consortium Board of Directors will review the manual for accuracy and propose changes to ensure that they are consistent with the Consortium Constitution and Bylaws.

Statement of Professional Responsibility

As members, we will strive to fulfill the purpose and preamble of the CPM Consortium, and of the public management profession;
We will seek to advance the sense of public duty;
We will adhere to the high standards of the consortium's constitution and bylaws;
We will share information, ideas and practices for the collaboration and good of the consortium and its members;
We will respect the integrity of each consortium member's program.

General Responsibilities of Board of Directors

As found in the *Constitution, Section 1*, a Board of Directors, consists of two representatives from each member program. Members of the Board of Directors have the following responsibilities:

1. To review and approve the financial goals and annual budget to assure the Consortium's financial stability.
2. To always act in accordance with the Constitution and By-Laws, and to achieve the Consortium's mission through prudent and ethical action.
3. To provide leadership to clarify and sustain the mission of the Consortium.
4. To provide information, ideas and suggestions from the member programs to the Board and communicate the activities and ideas of the Board to the member programs.
5. To participate actively in committee work to accomplish the Consortium's strategic objectives.
6. To represent and promote the Consortium to the public sector by maintaining a working knowledge of the Consortium's operations and services.
7. To represent the Consortium by identification as a Board member and act as spokesperson for the work of the Consortium when attending regional, state, local and other meetings and conferences where Consortium representation is desirable.

8. To assist the Consortium in identifying and procuring resources to achieve strategic objectives.
9. To participate in and be knowledgeable about curricular, administrative and public policy issues affecting the Consortium.
10. To attend the annual business meeting and actively participate in the decision-making process.
11. To participate in establishing and implementing strategic plans and objectives.
12. To elect and support individuals from among Board members to serve on the Executive Council.
13. To serve on accreditation committees when requested by the Chair or an Executive Committee officer.
14. To support and assist the AACPM in accomplishing their mission.
15. To finance their own participation as a Board member.

Duties & Responsibilities of Executive Council

The Chair, Vice-Chair, Secretary, five at large representatives of accredited or active members, the past chair of the Board of Directors and the Consortium Administrator (ex officio) will constitute an executive council to conduct the administrative and financial activities of the Consortium at times other than meetings of the Board of Directors. If significant actions are taken, report of actions will be distributed to all members of the Board of Directors. At large members of the Executive Council shall be elected for two year terms at annual meetings of the Consortium.

Officers

Officers of the Consortium are a Chair, Vice Chair, and Secretary. The Vice Chair and Secretary will be elected for one year terms at annual meetings of the Board of Directors. The Vice Chair will assume the role of Chair at the end of his/her one-year term. Newly-elected officers will assume their offices thirty (30) calendar days following the Annual Business Meeting and serve until twenty-nine (29) calendar days following the next Annual Business Meeting. The outgoing officers shall not appoint committees or initiate new business during the thirty days transition.

Chair. The Chair will call, develop agendas for and preside at all business meetings of the Board of Directors. The Chair will conduct administrative activities of the Consortium such as authorizing expenditure of Consortium funds, receiving and responding to correspondence and requests for technical assistance, appointing mentors, visiting members and representing the Consortium at meetings of organizations. The Chair will appoint committees or other representatives of the Consortium as required.

Vice Chair. The Vice Chair will coordinate all activities of initial and continued accreditation committees. The Vice Chair shall initiate the initial and/or continued accreditation process six months prior to the annual business meeting in accordance with the Constitution, the Bylaws, and/or the Procedures attached to the Bylaws. The Vice Chair will assume the duties of the Chair in the Chair's absence.

Secretary. The Secretary will prepare records of business meetings and distribute them to members of the Board of Directors. The Secretary will assume the duties of the Vice Chair in the Vice Chair's absence.

At-Large Members

The Member-at-Large (MAL) is a two-year elected position. The MAL represents the interests of the general membership and conducts projects and accepts duties as assigned by the

Consortium Chair. There are five MAL positions, elected on alternate years. On even years, two (2) are elected. On odd years, three (3) are elected. Each MAL is assigned to one or more of the Strategic Goals outlined in the strategic plan:

Outreach and Promotion- Expand CPM throughout 50 states

Internal Operations- Improve internal consortium communications, processes, systems and accountability

Performance Measures- Demonstrate return of investment for CPM program

In addition to general board member duties, each MAL has the following responsibilities:

1. To serve on a committee, as assigned by the Consortium Chair, or to champion a specific strategic goal as identified by the Board and/or Executive Council. Each committee should have at least one MAL assigned as chair or liaison.
2. To follow up with Committee members on mid-year committee work.
3. To prepare and submit Committee agendas and reports to Consortium Chair, before and after Committee meetings as appropriate.
4. To attend the Mid-year Meeting to report progress on committee action items and determine and address new agenda items. If significant actions are taken, report of actions will be distributed to all members of the Board of Directors.

Qualifications & Nominations for Executive Council Members

As found in the *Constitution, Article III, Section 2A*, prior to the Annual Meeting of the Consortium, the Chair of the Board of Directors shall appoint a nominating committee to nominate a Vice Chair, Secretary and either two or three at-large members to replace those on the Executive Council whose terms expire. The chair of the nominating committee shall have served as chair of the Board of Directors within three years prior to appointment as chair of the nominating committee.

The following general qualifications should be considered in selecting candidates:

1. Demonstrated knowledge and skills in the areas of public management and management development.
2. Prior experience as a Consortium Board member, including active participation on a Committee.
3. Active engagement in public policy and public management development issues at the national, state, regional or local level.
4. The ability to work collegially and effectively in a group process.
5. Possesses the highest ethical standards and exhibits a professional behavior that demonstrates those standards.
6. Must be a Board member from a fully accredited and active CPM program.
7. No two executive council members may be from the same CPM program.

Business Meetings

Annual Business Meeting

The purpose of the Annual Business Meeting of the Consortium is to provide the Board of Directors and the full National CPM Consortium membership an opportunity to meet and conduct Consortium business.

The Board of Directors will meet at least once in each operational year at the call of the Chair. An effort will be made to hold the annual meeting coincidental with the Annual AACPM Conference. This will allow for continued interaction and communication with the AACPM. The Chair should ensure that a specific agenda is provided in advance of both the Annual and Mid-Year/Special meetings to help facilitate a smooth, efficient meeting. This business should include, but not be limited to:

- Review of financial status.
- Recognizing new member states.
- Assigning mentor states to any states approved to be new or associate members since the last meeting (either Annual or Mid-year)
- Review or amend the constitution and/or bylaws.
- Assign tasks and responsibilities for any special committee work identified during the course of the meeting.
- Discuss any new business brought before the Board and conduct voting as necessary.

Committee Meetings

Committees are formed to address issues of strategic importance, primarily goals identified in the Consortium's Strategic Plan. Committee meetings are usually held in conjunction with the annual meetings at the same location. These working meetings are designed to flow as follows:

- 1) committee reviews objectives and accomplishments
- 2) committee creates assignments and action plans for identified issues
- 3) committee finalizes recommendations to bring to the board meeting

The Committee Chair then orally reports to the entire Consortium Board at the Annual Business Meeting, wherein they:

- 1) present objectives/accomplishments to board
- 2) present recommendations from the committee to the board
- 3) collect input/feedback from the board
- 4) identify new issues to add to the committee agenda
- 5) get approval from the board on completed proposals/recommendations

Following the Annual Business Meeting, the committee may meet briefly to assign or resolve new issues arising during the Annual Business Meeting.

Committee Chairs, assigned by the Consortium Chair, have the responsibility to organize and conduct committee business, to include:

- a) reviewing the committee charter and past minutes with committee members,
- b) facilitating the committee meeting,
- c) preparing and submitting a complete written report, noting the committee's specific actions and recommendations, including the Board's action on recommendations, using the standard format. This report is sent to the Secretary for inclusion in the Annual Meeting minutes. The standard committee report format is as follows:

Title of Committee
Date of Charter:
Committee Chair:
Committee Members:
Date of this Report:
Time Frame for Completion (if applicable):
Opportunity/Problem Statement: (Provide a clear statement describing the improvement opportunity or problem.)
Project Mission Statement: (Provide a clear statement describing what the team is chartered to do)
Description: (Describe the process to be improved or problem to be solved, or identify the steps in the process from beginning to end.)
Background: (Identify what has been happening, the importance of the project, and why the project is a high priority.)
Scope: (Identify the limits on the project to include whether the committee will be able to pilot improvements/solutions or just make recommendations. Also identify any fiscal, budgetary, regulatory, legal or procedural restrictions.)
Resources:
Committee Outputs: (immediate and long range)
Recommendations/Actions resulting from this meeting:

- d) preparing a short presentation of your recommendations to the full board at the Annual Meeting.

Mid-Year & Special Meetings

The purpose of the mid-year/special meetings is to provide the Executive Council with additional opportunities to conduct business that may require special or immediate attention or that must be completed before the annual meeting is convened.

A Mid-Year Meeting should be held to conduct any pending or unfinished business remaining from the annual meeting, provide committee reports based on any assignments established at the annual meeting, and/or to address any new business that needs Board attention prior to the Annual Meeting. Additionally, the Chair may call special meetings, as the need arises.

While these special/mid-year meetings involve Executive Council decisions, they should not preclude attendance by other consortium members if any would like to attend.

Voting & Quorum Definition

Voting may be done at any meeting of the Board of Directors, by telephone, or by mail. Each accredited and active member will have two votes. At meetings, written proxy votes will be honored. In the absence of a written proxy, one member representative may exercise both votes in the absence of the other representative. Associate members will have no vote. The President or designee of the American Academy of Certified Public Managers will have two votes.

For votes requiring representation of the Board of Directors, a quorum is defined as a majority of accredited and active members. For votes requiring representation of the Executive Council, a quorum is defined as a majority of Council members.

Annual Reports

Each accredited and active member is required to submit to the Consortium Administrator (ex officio) an annual report on or before April 20 for the preceding calendar year. The specific approved format is found in *Appendix A: Annual Report Format*.

Operational Year

The program and fiscal year for the Consortium shall be from 1 July to 30 June annually.

Application for Membership & Membership Status

Associate

Associate members have an interest in establishing a Certified Public Manager® program but have yet to meet the criteria for active membership. Associate memberships will be granted for two-year periods and may be renewed upon written application.

Associate membership may be requested in writing by an eligible entity with an interest in establishing a Certified Public Manager® program. Associate memberships will be granted upon favorable action by the Executive Council.

Active

Active members are members developing their programs for accreditation. Active membership will be granted for an indefinite period.

Active membership may be requested in writing by an associate member. The application must include a letter from the governor/ university president/chancellor or other appropriate governing official which demonstrates support for the proposed program. Active memberships will be granted upon a majority vote of the accredited and active members of the Board of Directors.

Accredited

Accredited members are members with Certified Public Manager® programs which have been accredited by the National Certified Public Manager® Consortium. Accreditation will be granted for a five-year period.

A written request is required from a member in active status for an initial accreditation review or from an accredited member for a continued accreditation review. After the requesting member completes an accreditation review, the accreditation review chair recommends accreditation to the Board of Directors at the annual meeting. Accredited memberships will be granted upon a majority vote of the accredited and active members of the Board of Directors.

Inactive Status

A member may request inactive status or be placed on inactive status by a two-thirds vote of the Board of Directors for non-payment of fees, non-attendance at annual meetings, lack of continued accreditation, failure to maintain program standards or lack of graduates. Prior to a vote, a task force appointed by the Chair will review and recommend action to the Board. Inactive status is subject to annual review by the Board of Directors.

Membership Withdrawal

Requests for withdrawal of membership or of accreditation will be made in writing to the Chair of the Board of Directors and may be submitted at any time.

Membership Dues & Meeting Fees

All accredited, active and associate members must pay annual membership dues/meeting fee of \$500.00, payable upon receipt of invoice.

Accredited and active members failing to pay membership fees/annual meeting fee within 90 days of the date of the invoice are ineligible to vote or participate in an annual meeting or for an initial or continuing accreditation review until the dues are paid in full, including the current year and accreditation review fees. An official purchase order is acceptable for payment.

Associate members failing to pay membership dues/annual meeting fee shall be ineligible for renewal of associate status or for active status until the dues are paid in full, including the current year. An official purchase order is acceptable for payment.

Fees may be changed by the Board of Directors at an annual meeting, but shall not be retroactive.

Dues and fees may be paid by check or credit card.

Members are expected to attend annual meetings at their own expense. Executive Committee Members are expected to attend mid-year business meetings at their own expense.

Accreditation Standards

Bylaws Art. III, Section 2, Standards.

A. Program Administration. Each program must have an advisory board including representation from local and state government and provisions for membership for, one or more CPM graduates and which will support the program by constructive review of curriculum and administrative procedures.

(Amended 9/07)

B. Program Design. Each program will provide opportunities for participants to apply the training to their work environment situations. The core curriculum shall incorporate the following competencies.

1. Personal and Organizational Integrity

Increasing awareness, building skills and modeling behaviors related to identifying potential ethical problems and conflicts of interest; appropriate workplace behavior; and legal and policy compliance.

2. Managing Work

Meeting organizational goals through effective planning, prioritizing, organizing and aligning human, financial, material and information resources. Empowering others by delegating clear job expectations; providing meaningful feedback and coaching; creating a motivational environment and measuring performance. Monitoring workloads and documenting performance. Dealing effectively with performance problems.

3. Leading People

Inspiring others to positive action through a clear vision; promotes a diverse workforce. Encouraging and facilitating cooperation, pride, trust and group identity; fostering commitment and team spirit. Articulating a vision, ideas and facts in a clear and organized way; effectively managing emotions and impulses.

4. Developing Self

Demonstrating commitment to continuous learning, self-awareness and individual performance planning through feedback, study and analysis.

5. Systemic Integration

Approaching planning, decision-making and implementation from an enterprise perspective; understanding internal and external relationships that impact the organization.

6. Public Service Focus

Delivering superior services to the public and internal and external recipients; including customer/client identification, expectations, needs and developing and implementing paradigms, processes and procedures that exude positive spirit and climate; demonstrating agency and personal commitment to quality service.

7. Change Leadership

Acting as a change agent; initiating and supporting change within the organization by implementing strategies to help others adapt to changes in the work environment, including personal reactions to change; emphasizing and fostering creativity and innovation; being proactive.

8. Adoption

The competencies shall be incorporated into the curriculum on or before September 2010 by all programs accredited as of September 2005. New members of the Consortium shall design their programs incorporating the competencies at their request for initial accreditation.

Paragraph 8 shall be deleted automatically September 2010. (Section B amended in its entirety 9/06)

C. Program Hours. The program must be at least 300 hours of structured learning activities. At least 250 hours must be instructor or facilitator directed and at least 200 hours address the competencies of the core curriculum. The remaining hours must be approved learning activities with specific learning objectives. Such learning activities may include but are not limited to application projects, structured readings, comprehensive examinations, and other approved workshops/courses. (Amended 9/06)

D. Learning or Job-Related Projects. There must be a requirement for a written demonstration of participants' effectiveness in applying the core competencies to their job environment. (Amended 9/06)

E. Evaluation of Participants. The program must provide substantive evaluation of all competencies described in Section 2B. Evaluation may be by oral examinations, written examinations, or assessment evaluations. (Amended 9/06)

F. Program Evaluation. The program must measure program effectiveness.

G. Enrollment Prerequisite. The program shall not require participants to enroll in or complete an academic degree program as a condition for admission. (Amended 9/06)

Mentor Program

The Consortium is a network of professionals with diverse experience in managing CPM programs. Each Associate member is assigned a mentor by the Consortium Chair. The mentor provides support and assistance to the associate member in achieving accreditation by providing technical assistance in the framework for and process of starting a program. The mentor does not accredit the program, nor will the mentor serve on the initial accreditation committee for which (s)he is a mentor.

Accreditation Review Procedures

Request for Review

Initial Accreditation. When an active member has developed a program which it feels meets all accreditation standards, it may request an accreditation review. Written requests will be made in writing to the Board of Directors no later than six months before the member expects to award the Certified Public Manager® designation.

Continuing Accreditation. Accreditation is for five years. At an annual meeting one year preceding the expiration of accreditation, accredited members will request, in writing, an accreditation review.

Accreditation

Accreditation Review Committees

For each member requesting either initial or continuing accreditation, the Chair will appoint an Accreditation Review Committee consisting of three members of the following categories: (1) a Consortium member from an accredited program; (2) a CPM instructor; and (3) a Certified Public Manager®. The Consortium member serves as Chair of the Accreditation Review Committee. Committee members should review *Appendix D: Accreditation Process Guide* for procedural guidelines and suggestions. Additional resources include *Appendices B & C: Accreditation Assessment Questionnaires*. Accreditation Review Committee Chairs may also find *Appendix E: Sample Letters* helpful in preparing official correspondence.

Accreditation Review Materials

Members requesting accreditation review will submit program materials to each member of the accreditation review committee. Materials should be organized into an electronic file or binder under the following tabs:

Tab 1 – *Program Overview*. A narrative descriptive overview of the program which provides information such as linkages with higher education and the role of an advisory governing board. (A program brochure will be helpful.)

Tab 2 – *Program Organization*. Information concerning the organization and function of the program to include an organization and functions chart which describes responsibilities for administration of the program, funding data, and biographical data on instructors.

Tab 3 – *Administrative Policies and Procedures*. Copies of program administrative materials such as policies on confidentiality, examinations, job-related project(s), electives, and certification requirements.

Tab 4 – *Course Delivery Schedule*.

Tab 5 – *Course materials*. Curriculum materials which include module titles, synopses of key points, learning objectives, and training schedules.

Tab 6 – *Examinations and Projects*. Copies of examination or participant evaluation instruments.

Tab 7 – *Program Evaluation*. Copies of coursework evaluation forms and a summary of a random sample of these evaluations.

Tab 8 – *Participant Information*. A listing of a representative sample of participants indicating names, addresses and telephone numbers.

Tab 9 – *Perceived Strengths and Weaknesses*. A statement of perceived strengths and weaknesses (if any) of the program and planned enhancement and corrective actions (if any).

Accreditation Fee

Fees shall be charged by the Consortium for the Initial Accreditation Review, and each Continued Accreditation Review. Fees are payable to the National Certified Public Manager® Consortium. The fee for accreditation is \$500.00 payable by check, credit card or purchase order at the time the review materials are submitted to the chair of the review committee. Mail checks and purchase orders to the Consortium's designated address

Site Visits

Initial Accreditation. A site visit is mandatory for an initial accreditation review. At least one member of the accreditation review committee shall personally visit the program requesting the review. Travel costs incurred as a result of a site visit will be paid by the active member requesting accreditation.

Continuing Accreditation. A site visit for continued accreditation is required unless the chair of the Consortium grants a waiver upon the request of the chair of the continued accreditation committee. Travel expenses for one committee member to conduct the site visit shall be paid by the member requesting a continued accreditation review.

Accreditation Committee Review Actions & Recommendations

The Accreditation Review Committee will review the program materials. Within ninety calendar days following receipt of the all accreditation materials, the committee chair will report committee initial findings and recommendations, in writing, to the active member and solicit comments.

The final report of the review committee's findings and recommendations will be submitted to the Board of Directors at the next annual or special meeting. A copy of the final findings and recommendations will be furnished to the active member and to the Consortium administrator.

Action by Board of Directors

The Board of Directors may grant accreditation, deny accreditation, which may be cause for further action pursuant to Article II of the Bylaws, or may grant provisional accreditation. The action of the Board of Directors will be furnished in writing to the active member within fifteen calendar days.

If provisional accreditation is granted, a second accreditation review will be conducted with final action taken by the Board of Directors within six months of initiation. The Board of Directors may grant or deny accreditation as a final action on the application for accreditation.

Developmental & Special Reviews

When an active member has developed no more than 50 percent of its program, a developmental review to provide feedback regarding the strengths and weaknesses of the program may be requested in writing to the Board of Directors. The Chair normally will appoint the mentor program as a committee to conduct the developmental review. Travel costs incurred as a result of a site visit will be paid by the member requesting the review. An informal report of the findings and recommendations of the committee will be furnished to the requesting member.

The Board of Directors may initiate a developmental review of an active member if it appears there has been insufficient progress by a member to implement its program. The Chair will appoint a review committee of at least three representatives of accredited members and will receive its findings and recommendations at the next meeting of the Board of Directors. Travel costs incurred as a result of a site visit will be paid by the member being reviewed. If this review is not completed because of a failure on the part of the member being reviewed to provide sufficient information for review, the membership status of the member will be assessed in accordance with Article 1, Section 2 of the Bylaws.

A special review for cause may be conducted at any time at the request of a majority of voting members of the Board of Directors. The Chair will appoint a special review committee consisting of not less than three representatives of accredited members which will submit a report of findings and recommendations at the next meeting of the Board of Directors. The Consortium will fund site visits determined to be required for special reviews.

Service Mark

“Certified Public Manager” is a registered service mark of the National Certified Public Manager® Consortium, issued by the United States Patent and Trademark Office on 9 September 2003 (Registration #2,760,841).

The American Academy of Certified Public Managers® possesses a Memorandum of Agreement with the Consortium authorizing the use of “Certified Public Manager” by the Academy, accredited programs and those who earn the CPM designation.

Both the AACPM and the Consortium are encouraged to use the symbol ® following Certified Public Manager in all print materials. Damages against an infringer will be much more difficult to obtain if the ® symbol is not used. The AACPM and the Consortium are also authorized to write “Registered in the U.S. Patent and Trademark Office” or “Reg. U.S. Pat & Tm Office” on materials.

The letters “CPM”, however, are not registered or protected in any fashion and should not have the ® symbol associated.

By protecting “Certified Public Manager” the credibility of the CPM credential each graduate of an accredited CPM program earns is ensured via the accreditation and continuing accreditation standards of the Consortium.

Appendix A: Annual Report Format

National Certified Public Manager® Consortium

ANNUAL REPORT FORMAT

Revised and approved by the Executive Council, National CPM Consortium, September 27, 2003, Oklahoma City, OK

[MEMBER NAME]

[REPORT FOR XXXX-XXXX CALENDAR YEAR]

[DATE]

I. ADMINISTRATIVE INFORMATION

A. Agency(ies) Responsible for Program Administration

B. Name, Title of Program Director(s)

C. Program Dates

1. Date Program Began

2. Date of Initial Accreditation

3. Date of Continued Accreditation

D. Program Authorization

E. Funding Source/Amounts (Note any changes)

F. Program Staff (Provide a summary of the numbers of full time, part-time and contract staff)

G. Administrative Structure (Outline duties of various components, i.e., state agency, university, board of directors, advisory board)

H. Policy Changes During Past Year

II. SESSION/PARTICIPANT INFORMATION

A. Sessions

1. Number of sessions offered during the past year (Specify length of session, i.e., One-week levels – 14; Two-day levels 10)
2. Total number of CPM participants attending sessions

B. Projects

Number of project(s) required per participant

C. Books

Number of book reading application(s) required per participant

D. Examination(s)

Number of examination(s) required per participant

E. Other Requirements

III. DEMOGRAPHICS

A. Participant Numbers

1. Total number of active CPM participants to date
2. Number of new participants

B. Graduates

1. Total number of graduates of supervisory level to date (if applicable)
2. Number of Supervisory graduates during current year
3. Total number of CPM graduates to date
4. Number of CPM graduates during current year

C. Participant source

1. Percentage from State

2. Percentage from County
3. Percentage from City
4. Percentage from Federal
5. Percentage from Other

IV. PROGRAM INFORMATION

- A. Program design or curriculum changes introduced during current year
- B. Program delivery changes introduced during current year
- C. Program support for local CPM society during the current year including Examples of the minimum expectations listed below:
 1. Educating candidates and graduates about the Consortium and the Society through CPM program communication channels.
 2. Facilitating the connecting of initial graduates with AACPM in order to form a new society.
 3. Willingness to position the CPM Program director as an ex officio member of the state society board of directors.
 4. Supporting and/or facilitating the Askew Award process for state societies and help keep AACPM informed about Askew Award winners.
 5. Involving society officers and members in the continuing accreditation site visits.
 6. Other.
- D. Ceremonies held during current year (CPM; Supervisory Certificate, Other)
- E. Summary of evaluation methods and results during the current year
- F. Summary of academic credit or continuing education units awarded for CPM course work
- G. Summary of pay incentives, promotional opportunities and experience substitution awarded for CPM course work/completion – other CPM incentives?

V. FUTURE GOALS

Briefly state any plans for the upcoming year

The following information, although not required, may be attached:

Current schedule

Program brochure

Advisory Board membership

Bylaws, Policies, Procedures

Staffing chart

Instructors' biographical data

Copies of exams, project requirements, reading application guidelines, other requirement(s) guidelines

Course/session topic listing, curriculum outlines, course objectives

Appendix B: Accreditation Assessment Questionnaire for Four Learning Areas

National Certified Public Manager® Consortium
Adopted 6/01

Consortium Member: _____ Date: _____

Committee Member: _____ from: _____
Consortium Member/State Society

Directions: Please review the documents you have received and respond either yes or no to the statements below. If your answer is NO to any question or a series of questions, the committee chair should obtain clarifying data.

Tab 1 – Program Overview **Yes** **No**

- | | | |
|---|-----|-----|
| 1. An appropriate linkage exists between government and higher education institution(s) | ___ | ___ |
| 2. A governing or advisory board is in place with a clearly described function | ___ | ___ |
| 3. Program has the capability to admit participants from state, local, and federal government | ___ | ___ |
| 4. Program requirements are clearly identified and listed | ___ | ___ |

Tab 2 – Program Organization **Yes** **No**

- | | | |
|--|-----|-----|
| 1. Funding is sufficient to support program | ___ | ___ |
| 2. A list of program instructors and bios are included | ___ | ___ |

Tab 3 – Administrative Policies and Procedures **Yes** **No**

- | | | |
|--|-----|-----|
| 1. Written policies and procedures exist on such things as admission, tests, projects, elective credit options, confidentiality and privacy rights of participants, etc. | ___ | ___ |
| 2. A candidate tracking system is in place to inform candidates of their progress in the program | ___ | ___ |
| 3. Requirements for projects are clearly specified | ___ | ___ |
| 4. Security measures are in place around participant assessment components | ___ | ___ |
| 5. Assessment review standards are clearly specified | ___ | ___ |

Tab 4 – Course Delivery Schedule **Yes** **No**

1. A current coursework delivery schedule is included ___ ___

Tab 5 – Course materials **Yes** **No**

1. Core curriculum addresses all four learning areas specified in the By-laws ___ ___

2. Entire program is documented with learning outcomes specified by each course or learning activity ___ ___

3. Curriculum shows integration and clearly demonstrates how program segments are related ___ ___

4. Clear policy exists on equitable and monitored substitution, if allowed ___ ___

5. At least 300 hours of structured learning activities are in place ___ ___

6. At least 250 hours are instructor or facilitator directed ___ ___

7. At least 200 hours are in core curriculum learning areas ___ ___

8. Elective courses relate to the four learning areas cited in the By-laws ___ ___

Tab 6 – Examinations and Projects **Yes** **No**

1. A clear relationship exists between projects and curriculum ___ ___

2. Any group projects have clearly defined individual responsibilities ___ ___

3. Methods exist for providing individual feedback on projects ___ ___

4. The assessment process is clearly related to learning outcomes and core curriculum ___ ___

5. Participants receive feedback on assessments as appropriate ___ ___

6. The assessment process includes tests of knowledge and practical application ___ ___

Tab 7 – Program Evaluation **Yes** **No**

1. Data is collected on:

Participant reaction ___ ___

Level of knowledge and skills improvement gained ___ ___

Application of knowledge and skills to the work setting ___ ___

Organizational impact ___ ___

2. Provision is made for incorporation of evaluation results in program development ___ ___

Tab 8 – Participant Information

Yes No

1. A list of participants is included indicating names, addresses and telephone numbers

___ ___

Tab 9 – Perceived Strengths and Weaknesses

Yes No

1. Are program strengths identified and discussed

___ ___

2. Are program weaknesses identified

___ ___

3. Continuous improvement processes are addressed

___ ___

Based on the materials which you have received, and the Bylaws of the Consortium, do you recommend that this state be granted accreditation.

Yes _____

No _____

Provisional _____

If No or Provisional, please explain:

Signature: _____

Appendix C: Accreditation Assessment Questionnaire for Competency-based Programs

ACCREDITATION ASSESSMENT QUESTIONNAIRE

Adopted 3.18.06

State of _____ Date _____

Committee Member _____ State _____

Directions: Please review the documents you have received and respond either yes or no to the statements below. If your answer is no to any question or a series of questions, the committee chair should obtain clarifying data.

Tab 1 – Program Overview	Yes	No
1. An appropriate linkage exists between government and higher education institution(s)	___	___
2. A governing or advisory board is in place with a clearly described function	___	___
3. Program has the capability to admit participants from state, local, and federal government	___	___
4. Program requirements are clearly identified and listed	___	___

Tab 2 – Program Organization	Yes	No
1. Funding is sufficient to support program	___	___
2. A list of program instructors and bios are included	___	___

Tab 3 – Administrative Policies and Procedures	Yes	No
1. Written policies and procedures exist on such things as admission, tests, projects, elective credit options, confidentiality and privacy rights of participants, etc.	___	___
2. A candidate tracking system is in place to inform candidates of their progress in the program	___	___
3. Requirements for projects are clearly specified	___	___
4. Security measures are in place around participant assessment components	___	___
5. Assessment review standards are clearly specified	___	___

Tab 4 – Course Delivery Schedule	Yes	No
	___	___

1. A current coursework delivery schedule is included ___ ___

Tab 5 – Course materials Yes No

1. Core curriculum addresses all of the seven (7) competencies listed on the CPM Competency Model specified in the By-laws ___ ___

2. Entire program is documented with learning outcomes related to core competencies identified in each course or learning activity ___ ___

3. Curriculum shows integration of competencies ___ ___

4. Clear policy exists on equitable and monitored substitution, if allowed ___ ___

5. At least 300 hours of structured learning activities are in place ___ ___

6. At least 250 hours are instructor or facilitator directed ___ ___

7. At least 200 hours are related to the CPM Competency Model ___ ___

Tab 6 – Examinations and Projects Yes No

1. A clear relationship exists between projects and curriculum ___ ___

2. Any group projects have clearly defined individual responsibilities ___ ___

3. Methods exist for providing individual feedback on projects ___ ___

4. The assessment process is clearly related to learning outcomes and core competencies ___ ___

5. Participants receive feedback on assessments as appropriate ___ ___

6. The assessment process includes tests of knowledge and practical application ___ ___

Tab 7 – Program Evaluation Yes No

1. Data is collected on:

Participant reaction	___	___
Level of knowledge and skills improvement gained	___	___
Application of knowledge and skills to the work setting	___	___
Organizational impact	___	___

2. Provision is made for incorporation of evaluation results in program development ___ ___

Tab 8 – Participant Information Yes No

1. A list of participants is included indicating names, addresses and telephone numbers ___ ___

Tab 9 – Perceived Strengths and Weaknesses

	Yes	No
1. Are program strengths identified and discussed	___	___
2. Are program weaknesses identified	___	___
3. Continuous improvement processes are addressed	___	___

Based on the materials which you have received, and the Bylaws of the Consortium, do you recommend that this state be granted accreditation.

Yes _____ No _____ Provisional _____

If No or Provisional, please explain:

Signature: _____

Appendix D: Accreditation Process Guide

National Certified Public Manager® Consortium

ACCREDITATION PROCESS GUIDE FOR CPM PROGRAM MANAGERS AND CONSORTIUM SITE REVIEWERS

Adopted 6/01 rev. 2/07

Introduction

The National Certified Public Manager Consortium and the American Academy of Certified Public Managers share the following vision and mission:

Vision: World class leaders and managers for the public service.

Mission: To promote professionalism, excellence, and quality principles in public management through:

endorsement of dynamic leadership, high ethical standards, and education, development, and training dedicated to serving the public interest

adherence to the CPM program as the ideal comprehensive management development process

performance as a professional association/accrediting body to maintain the highest standards for management and management training.

In pursuit of this vision and mission, the purpose of the National CPM Consortium is to accredit Certified Public Manager programs by promoting high standards, facilitating program development, encouraging innovation, and developing linkages with programs and organizations with similar concerns.

It is important to recognize that both the CPM program managers and the Consortium site reviewers play several roles during the accreditation process, some of which may be competing:

Program managers

Documenter—providing information about the program

Facilitator—helping the reviewers

Politician—influencing the review

Accreditation reviewers

Auditor/Guardian—ensuring standards are met

Liaison—communicating findings to the Consortium

Cheerleader—supporting the CPM concept and negotiating findings that help the specific program

In addition, the program managers and reviewers are both teachers and learners. Both provide information and feedback and both apply information to make decisions or change behavior. Reviewers frequently learn best practices they take back to their own programs; program managers learn about other CPM programs, as well as about standards and expectations.

Program Manager's Responsibilities

Preparing Program Documentation

From the beginning, the program manager should be checking with the accreditation committee chair to determine expectations with regard to the accreditation notebook and the site visit. Spend time making these expectations as explicit as possible so that there are no surprises.

- I. Organize your materials before sending them to the review committee.

Follow the Consortium guidelines, i.e., a three-ring binder with tabbed sections that correspond to each of the nine By-law requirements; also include information from the Accreditation Questionnaire.

NOTE: If an item on the Accreditation Questionnaire is required in the By-laws, you must have it in your program in order to receive accreditation (e.g., hours of instruction, learning areas, etc.).

Address the minimum requirements for accreditation (number of hours, content areas, etc.) in the first section (narrative overview). NOTE: The curriculum of each CPM program by September 2010 shall be based on the Consortium approved competencies in the Bylaws. Provide supplementary materials in another notebook and make sure references to these materials are clear. Contact the chair of your review committee to be sure that everything the team will need is in your materials.

If examinations or assessments that you expect to remain confidential, please mark all such documents as “CONFIDENTIAL” and NOT TO BE COPIED OR DISSEMINATED.”

II. Decide what *not* to put in the accreditation notebook.

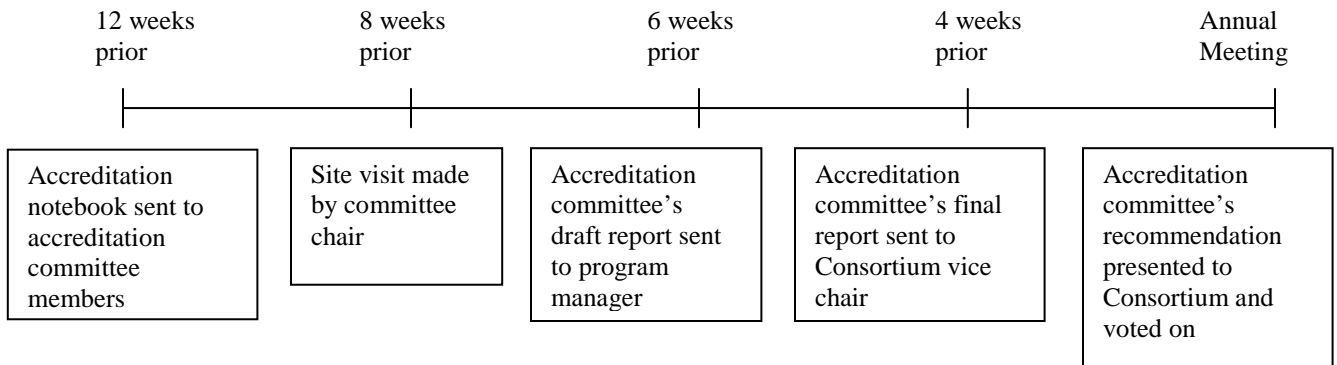
Some things are too bulky or unwieldy and some things are best shared by direct presentation. Refer to those in the written materials, indicate they will be available at the site visit, and be sure to schedule them for the site visit (e.g., records management system, full set of class materials, etc.).

III. Before the materials are sent to the review team, conduct a self-evaluation.

Ask others such as advisory board members, graduates, instructors, etc. to review the accreditation notebook to determine if it is complete, clearly written, and convincing.

IV. Send a copy of the notebook to each member of the accreditation review committee.

Materials should be submitted on a timely basis. For example, if the Consortium will be meeting to determine accreditation on September 15, the *shortest* timeline is:



Be sure to send your accreditation materials by traceable means to the vice-chair. If possible, submit your materials on a disk as well as on hard copy.

Preparing for the Site Visit

I. In consultation with the accreditation committee chair (or site reviewer), establish the time for the site review well in advance. Be sure you have **at least two full days** for the review. If possible, coordinate the site visit with program activities such as a class, special activity, society meeting, graduation, etc.

- II. With the site reviewer, identify the key issues to examine and the key individuals and groups to meet, e.g., advisory board members, agency heads or designees, agency training directors, graduates, candidates, instructors. Some reviewers want to talk with these groups in a particular order, so make an effort to accommodate this preference.
- III. Prepare the individuals and groups by anticipating some of the issues or questions they can expect. However, encourage them to be open and candid in their responses.
- IV. Identify which materials the reviewer will want to see, e.g., class materials, tests, projects, student records. Be sure the materials will *add to*, not duplicate, the information covered in the written documentation.
- V. Create a site review schedule or agenda. Be sure there is sufficient time to review documents and materials as well as to meet with individuals and groups. Also include time for social activities such as a luncheon with board members or a social gathering with graduates.
- VI. Double-check everything. Be sure to leave extra time in the schedule; it's always needed.
- VII. Hold a debriefing at the end of the site visit. Ask the reviewers questions such as: What did they like about the program? What would they like to see improved? What were the program's strengths and areas for improvement? Is there any additional information needed?

Site Visit Follow-up

Be sure to document any additional information requested by the reviewers and respond to their follow-up needs. If requested, review their draft report.

Site Reviewer's Responsibilities

Preparing for the Site Review

- I. Communicate with the program manager regarding your expectations for the accreditation notebook and for the site review. Be specific about the amount of time you have available for the review.

- II. In consultation with the program manager, identify the dates for the site review.
- III. After all committee members have received and reviewed the accreditation notebook, the committee chair should tell the program manager about any additional materials or information the committee will need to review, before, during or following the site visit.
- IV. Identify the specific individuals (by titles or responsibilities) and groups with whom you would like to meet and notify the program manager.
- V. In consultation with other members of the accreditation review committee, decide what you want to see in each element of the site review, e.g., what part of the records management system do you need to review? How many examples of class materials do you want to see? What do you need to find out from participants? From agency representatives? From Advisory Board members? Be sure that your needs, concerns, and questions are reflected in the site visit schedule or agenda prepared by the program manager. (If you do not communicate your needs, do not expect to have them met!)

During the Site Review

Your host program representatives will have worked hard to prepare for your visit and review, including preparing materials and scheduling meetings. Be sure to arrive on time and keep on schedule. Devote yourself completely to the process.

- I. Meet with the following groups (as well as others the committee deems appropriate). Possible discussion items include:
 - A. Advisory Board Members
 - 1. What is your role?
 - 2. How are you contributing or adding value to the program?
 - 3. How effective do you believe the board is? How could it improve or add greater value?
 - 4. How effective do you believe the program is? How could it improve?
 - 5. What do you hope the board will do or accomplish in the next five years?
 - B. Program Managers
 - 1. What are the program's strengths, weaknesses, opportunities and threats (in addition to those identified in the accreditation notebook)?

2. How effective do you believe the program is? What would you like to see happen or change in the next 5 years?
3. How do you ensure that the curriculum is current and meets participant needs?
4. Are there issues with regard to relationships with other organizations (or your own organization) which must be addressed in the near future, or in the next 5 years?
5. How does the program support the local CPM society?

C. Instructors

1. What do you see as the strengths and weaknesses of the program?
2. How well do you know the program? Do you believe you can address general program issues with participants in your classes?
3. How effective is your relationship with the program? Has program administration been supportive? Have you benefited from your association with the program?
4. What part does your teaching play in the curriculum? Do you believe your role is integrated into the curriculum and program as a whole?
5. How do you ensure that what you are teaching (and how you are teaching) is current and effective?
6. Are there areas the curriculum does not address that should be addressed?

D. Participants (initial accreditation review), Participants and Graduates, including members of the CPM society, if possible, (continuing accreditation review)

1. What is your general evaluation of the program? What are its strengths and weaknesses?
2. What would you change in the program? What would you not change? What did you like best and least?
3. In what ways has the program benefited you?
4. In what ways has the program benefited your agency?
5. Does the program appropriately and adequately support the CPM society?

II. Site reviewers are expected to review the following documents:

1. Participant and graduate records, tracking system and records security
2. Tests, assessments and other evaluations of participants
3. Projects (both general guidelines and specific projects)
4. Curriculum materials—are they up-to-date, complete, accurate, attractive?

5. Policies and procedures—are they consistent with Consortium requirements?
- III. Meet with the program administrator(s) and staff before leaving the site to provide a preliminary review of findings. Identify any continuing concerns and any additional information or documentation your team still needs.

After the Site Visit

- I. Be sure to follow up on any requested information or documentation.
- II. Write a draft report and submit this to the program manager for review.
- III. Prepare a final report of findings and send an electronic copy to the vice chair of the Consortium and the Consortium administrator.

Initial vs. Continuing Accreditation

An initial accreditation review should be focused on two things:

- 1) Has the program met the minimum requirements for accreditation?
- 2) Does the program have a plan for continuing improvement?

A continuing accreditation review should certify that minimum standards continue to be met and should demonstrate that there is an emphasis on continuous improvement. That is, merely meeting minimum standards suggests that the program is not sufficiently focused on improvement and effectiveness.

In discussions before a review, be sure to address the issues relative to the kind of review being conducted.

Appendix E: Sample Letters for Accreditation Committee Chairs

Letter A- Initial Letter to Program Being Reviewed

Send this letter to: [Member] CPM Program to be Reviewed
Letter from Accreditation Committee Chair
Purpose of letter List committee members and addresses for sending materials and proposing site visit dates

Name and Address of CPM
Program Representative
Scheduled for Accreditation

Dear _____:

As we discussed, I am sending you the accreditation checklist and the accreditation process guide adopted by the Consortium in 2001. The Accreditation Committee would like to receive you program information by _____ (date) _____ in order to allow time to review materials before the site visit.

Listed below are the names and addresses of the Accreditation Committee:

Name, Member CPM Program, Chair
Address

Name, Member CPM Program Instructor
Address

Name, Member CPM Program Graduate
Address

I would like to propose either _____ or _____ for the site visit. Just let me know which one suits you best. We are looking forward to visiting with you and exchanging program information and ideas.

After reviewing the checklist and accreditation process guide, please let me know if you have any questions concerning accreditation requirements.

Sincerely,

Committee Chair

cc: Committee members
Jack Lemons, Consortium Administrator

Letter B- Letter of Instruction to Committee Members

Memorandum to	Committee Members
Memorandum from	Committee Chair
Purpose	Provide date to return recommendation and checklist/evaluation based on review of materials; solicit interest in joining the chair for the site visit

MEMORANDUM

To: Committee Members
From: [Name] Committee Chair
Date:
Subject: Program Accreditation

First of all, thanks for serving on the {Member] CPM Program Accreditation team. As Chair of the committee, I have put together a tentative plan, but I welcome your input and assistance.

I have talked with ___(program representative)___, ___ CPM program director (or manager), regarding timeframes for a materials review and site visit (see enclosed letter).

Before the site visit, I would like your analysis and evaluation of whether the ___ CPM Program meets accreditation standards, as well as any questions that need to be addressed based on the materials you have reviewed. By ___date___, please send me the completed accreditation questionnaire with your additional comments. Then we can touch base, if needed, before the site visit.

I look forward to hearing from you. My phone number is _____ or I can be reached at the following e-mail address: _____

LETTER C- Letter of Recommendation

TO: Chair, National CPM Consortium
FROM: Accreditation Committee Chair
PURPOSE: To communicate the accreditation committee's recommendation on accreditation or continuing accreditation

Name and address
National CPM Consortium Chair

Dear _____:

The members of the _____ Accreditation Committee are very pleased to recommend accreditation (or continuing accreditation) for the _____ Certified Public Manager program. This recommendation is supported by the attached report on the committee's findings. The _____ CPM program is _____ (comments on program), and is in compliance with the Consortium's requirements for accreditation.

On behalf of the other committee members, _____, name, program, and _____, I want to express our appreciation to _____ name of program manager for preparing extensive information and documentation for the committee's review and for planning and ensuring a most productive site visit.

Sincerely,

_____, Chair
_____ CPM Accreditation Committee

cc: _____ Committee Members
Jack Lemons, Consortium Administrator
[Name], National CPM Consortium Vice Chair

Enclosure: Findings and Recommendations

Enclosure Outline

Findings and Recommendations

[MEMBER] Certified Public Manager Program

- I. Program Administration
Findings:
Recommendations:
- II. Program Design
Findings:
Recommendations:
- III. Curriculum and Hours of Instruction
Findings:
Recommendations:
- IV. Tests of Learning and Job-related Projects
Findings:
Recommendations:
- V. Evaluation of Learning
Findings:
Recommendations:
- VI. Program Evaluation
Findings:
Recommendations:
- VII. Strengths and Weaknesses
Findings:
Recommendations:

Appendix F: Press Releases Templates

The following pages contain templates for press releases commonly associated with Consortium business.

FOR IMMEDIATE RELEASE:

Date

STATE PROGRAM/INSTITUTION BECOMES MEMBER OF NATIONAL ORGANIZATION

CITY – The State program/institution has been named the newest member of the National Certified Public Manager® Consortium. The National Certified Public Manager® Consortium is the governing body that establishes and preserves standards for public management development programs across the nation that award the Certified Public Manager® designation. As an associate member, State will be developing its Certified Public Manager® program and preparing for accreditation by the national organization. Certified Public Manager® programs have been improving the effectiveness and professionalism of government managers since 1979. The quality and efficiency of management in government have a major impact on the lives of citizens and the orderly functioning of society.

For more information about the State Certified Public Manager® program Insert reference/contact info here.

-end-

For Further Information:

Name
Title
Phone

FOR IMMEDIATE RELEASE:

Date

**STATE CERTIFIED PUBLIC MANAGER® PROGRAM RECEIVES ACCREDITATION
FROM NATIONAL ORGANIZATION**

CITY WHERE ANNUAL MEETING WAS HELD – The **State** Certified Public Manager® program received accreditation from the National Certified Public Manager® Consortium.

The accreditation was approved by a vote of the consortium’s Board of Directors after extensive review and recommendation by an appointed accreditation review team. The National Certified Public Manager® Consortium is the governing body that establishes and preserves standards for public management development programs across the nation that award the Certified Public Manager® designation. Accredited programs have demonstrated their ability to maintain and improve the effectiveness and professionalism of government managers. The quality and efficiency of management in government have a major impact on the lives of citizens and the orderly functioning of society.

This 5-year accreditation represents extensive preparation and effort on the part of **State’s** Certified Public Manager® program administrators and staff. Administrators of the **State’s** Certified Public Manager® program are **names**.

-end-

For Further Information:

Name
State Accreditation Committee Chair
Phone

FOR IMMEDIATE RELEASE:

Date

STATE TITLE ELECTED TO OFFICE IN NATIONAL ORGANIZATION

CITY – State’s Director/Title, Name, has been elected to serve as Office of the National Certified Public Manager® Consortium for a two-year term.

The National Certified Public Manager® Consortium is the governing body that establishes and preserves standards for public management development programs across the nation that award the Certified Public Manager® designation. The organization is dedicated to the development of current and future leaders in public management.

Name has served as Position since Year. Insert short list of accomplishments here.

-end-

For Further Information:

Name
Title
Phone

Appendix G: Consortium Administrator's Operational Calendar

NATIONAL CPM CONSORTIUM OPERATIONS CALENDAR

As of 3/09

JANUARY

- Finalize midyear meeting agenda (cc President of AACPM)
- Final Midyear meeting arrangements
- Send final accreditation committees to Vice Chair
- Announce Due date for Annual Reports
- Monthly financial report
- Update directory as needed and post

FEBRUARY

- Publish final midyear meeting agenda
- Monthly financial report
- Update directory as needed and post

MARCH

- Post notice of annual meeting on website
 - Dates*
 - Location*
 - Hotel*
 - Rates*
 - Reservations*
 - Air transportation*
 - Ground Transportation*
- Finalize and distribute minutes of midyear meeting
- Identify contact persons at annual meeting hotel for menus
- Monthly financial report
- Update directory as needed and post

APRIL

- Draft preliminary annual meeting agenda; Chair approves
- Reminder about Annual Reports
- Identify Askew Awards time frame for this year; notify Consortium past chair
- Review catering menus from Annual Meeting venue and develop options and costs for Executive Council review and decision
- Monthly financial report
- Update directory as needed and post

MAY

- Send next year's membership dues invoices and, as indicated, accreditation fee
- Send approved preliminary annual meeting agenda to Executive Council
- Finalize logistics of annual meeting and send to Board reminding to reserve room
- Monthly financial report
- Update directory as needed and post

JUNE

- Send approved preliminary annual meeting agenda to Board for input (cc President of AACPM)
- Finalize food service for Annual Meeting and forward to venue and AACPM host
- Send accreditation committee eligibility list to chair
- Remind chair to appoint nominating committee
- Final notice regarding annual reports
- Monthly financial report
- Update directory as needed and post

JULY

- Prepare 990 EZ or other required tax returns
- Send committee chairs committee charter and minutes for all past meetings
- Advise Chair regarding members meeting criteria for review committee chairs
- Prepare administrator's annual report
- Monthly financial report
- Update directory as needed and post

AUGUST

- Send final annual meeting agenda to Board with attachments
- Advise board on voting requirements
 - Eligible*
 - Proxies*
- Send committee chairs format for report and remind members up for accreditation review to send request letter
- Advise associate members needing to extend for another two years
- Prepare accreditation certificates
- Check with accreditation review chairs for attendance at Annual Meeting; mail accreditation certificate for signature
- Monthly financial report
- Update directory as needed and post

SEPTEMBER

- Annual Meeting
- Remind Board of voting requirements and to designate proxies in writing
- Follow-up on non-payment of dues and fees
- Monthly financial report
- Update directory as needed and post

OCTOBER

Confirm room needs for next years annual meeting with AACPM host state and hotel

Distribute annual meeting minutes
Monthly financial report
Update directory as needed and post

NOVEMBER

Begin finalizing accreditation committees
Monthly financial report
Update directory as needed and post

DECEMBER

Initiate arrangements for midyear meeting site, meals and refreshments
Post notice of midyear meeting on website
Monthly financial report
Update directory as needed and post

AS REQUESTED

Request for **ASSOCIATE STATUS** –

Review request
Send request and supporting documents to Executive Council for vote
Record vote
Report to new associate member
Deposit dues
Record contact information in directory
Advise of midyear and/or annual meeting

Request for **ACTIVE STATUS**

Review request and supporting documents
Determine if request is for annual meeting or electronic vote
If
 annual meeting, add to agenda with supporting documents
 electronic vote, develop ballot and distribute to Board with supporting documents
Secretary tabulates vote and records.
Notify requesting member
Notify Board of vote results
Revise membership and directory to show ACTIVE status.