

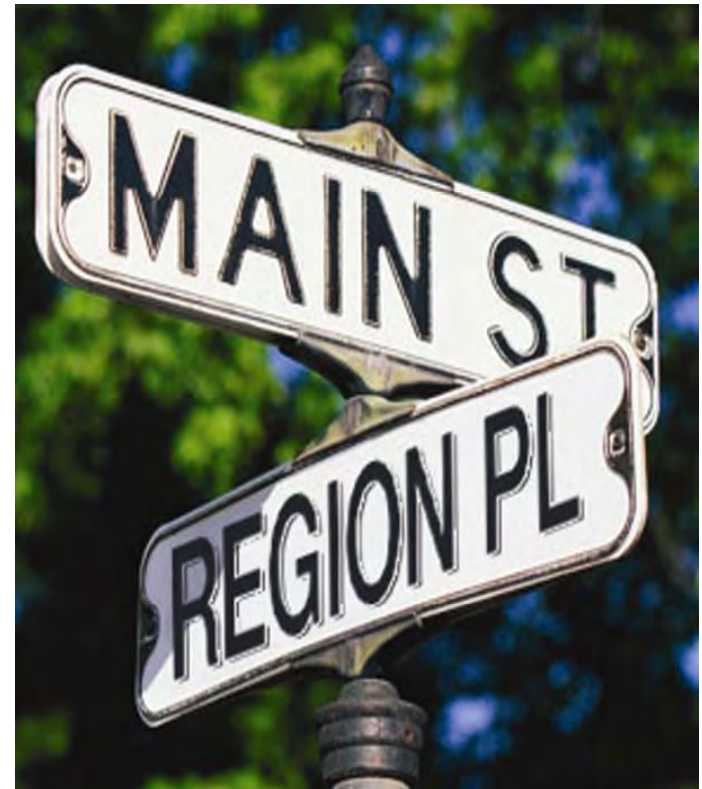


EXECUTIVE DIRECTORS PEER LEARNING LAB

2010 NADO ANNUAL TRAINING CONFERENCE | SAN DIEGO, CA

About NADO

- Strengthen local governments, communities and economies through the regional strategies, partnerships and solutions of the nation's regional development organizations



Advocacy | Education | Networking | Research



Regional Council Self-Assessment Guide

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- 7 Significant Issues
- Policy Board
- Executive Management
- Login

Welcome

The Regional Council Self-Assessment and Resource Toolkit is intended to assist executive directors, policy board members and senior professional staff of the nation's regional planning and development organizations in improving and evaluating their overall performance, management and leadership skills and performance.

Developed by the National Association of Development Organizations (NADO) and the Development District Association of Appalachia (DDAA), the online toolkit is set up with individual modules that cover a variety of professional and organizational development topics, including:

- positioning your regional council in a new era of regionalism
- addressing seven significant issues facing regional councils
- managing an effective regional council policy board
- becoming an effective regional council executive director
- building an effective statewide network and state association
- general concepts of leadership and regional council innovations

NADO and DDAA want to recognize the SouthEast Regional Directors Institute, Missouri Association of Councils of Government, Appalachian Regional Commission, U.S. Economic Development Administration and other partners for their contributions in making this project a reality. Our goal was to develop a comprehensive framework for voluntary peer reviews and exchanges that would empower regional council policy boards and executive management to evaluate and improve their overall governance structures, management capacity, programs and operations.

Any opinions, findings, conclusions or recommendations expressed on this Web site or in this toolkit are those of the authors and do not necessarily reflect the views of the National Association of Development Organizations (NADO) or the Development District Association of Appalachia (DDAA), as well as the Appalachian Regional Commission (ARC) or the U.S. Economic Development Administration (EDA).



How to Use this Site

Across the top of this web site is a series of tabs that correspond with the sections of the toolkit (Role in Region, 7 Significant Issues, etc.). Within each section is a series of surveys aimed at asking inward-looking questions about the role and effectiveness of your organization. Once each survey has been completed, you can elect to either move on to the 'next' section or 'submit' the survey. There is also an option to print or email sections of the survey using the icons in the top right-hand corner of each page.

Once a survey has been submitted, a series of pie-charts will appear displaying the answers you've selected for that individual section of the survey.

Main Menu

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Training Modules

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Download the Toolkit

You can download the full assessment tool kit by clicking on the PDF icon link below



To download the pdf right click on the image above and choose "Save Link As"

Regionalcouncilguide.org

Regional Council Self-Assessment Toolkit



1. **Defining Today's Era of Regionalism**
2. **Evaluating Your Role in Modern Era of Regionalism**
3. **Seven Significant Issues Facing Regional Councils**
4. **Managing an Effective Regional Council Policy Board**
5. **Regional Council Executive Director Checklists**
6. **State Associations of Regional Councils**
7. **Regional Council Snapshots: Innovations and Practices**
8. **Peer Resource Exchange: Food for Thought**
9. **Concepts of Leadership**

Special Thanks



- ▶ Development District Association of Appalachia
- ▶ Appalachian Regional Commission
- ▶ Missouri Association of Councils of Government
- ▶ SouthEast Regional Directors Institute
- ▶ Economic Development Administration
- ▶ NADO Board of Directors and Membership

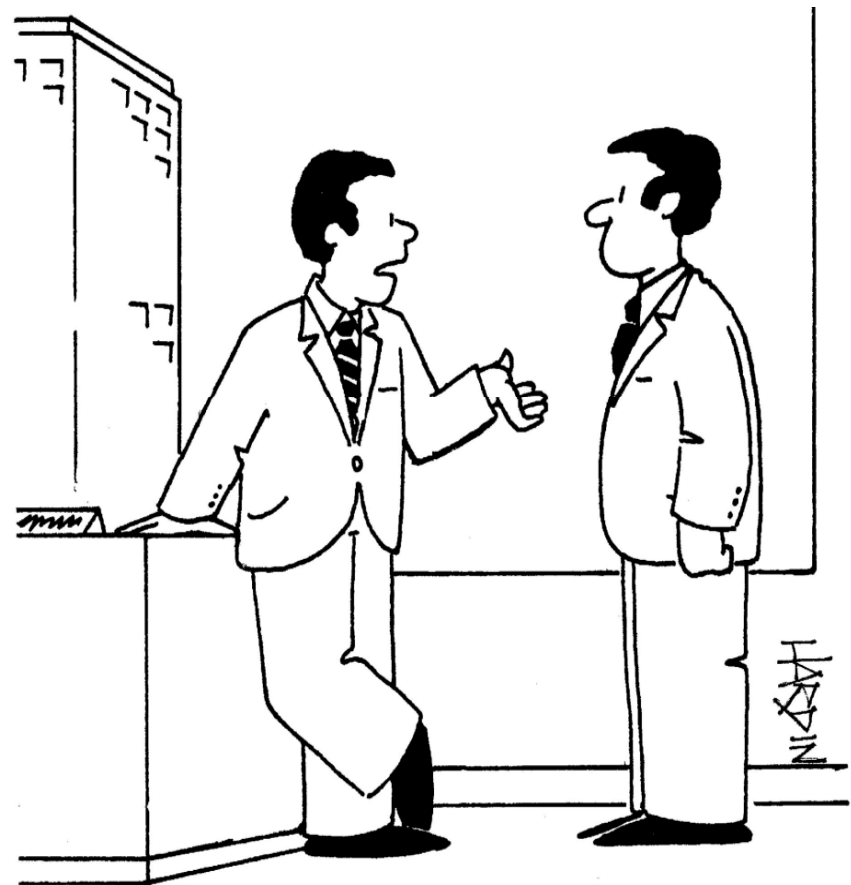
Workshop Overview



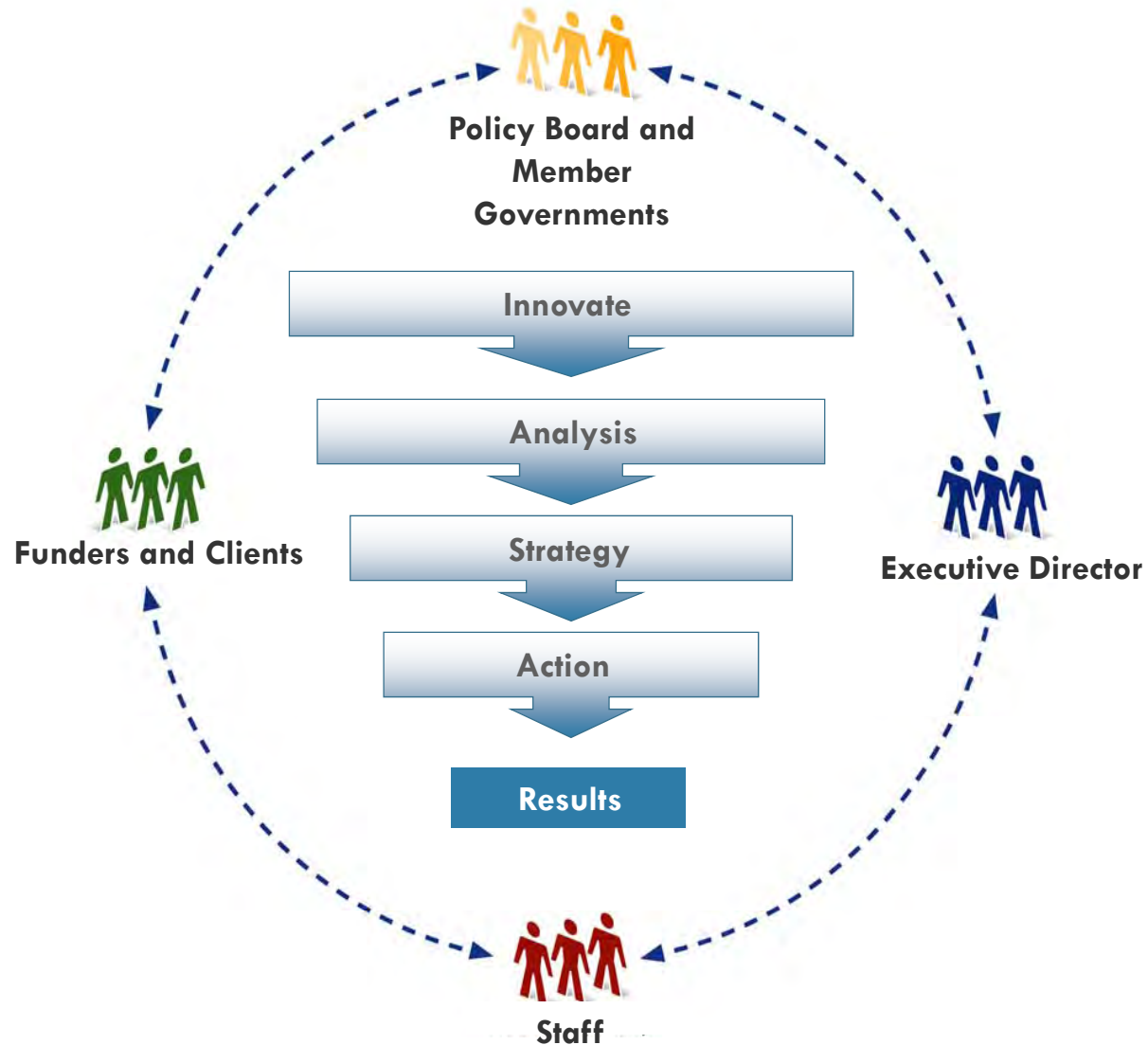
- ▶ Back to the Basics: Purpose and Mission
- ▶ Observations from the Road
- ▶ Defining Success in Era of Accountability
- ▶ Managing an Effective Policy Board
- ▶ Case Studies, Peer Learning and Group Therapy

Back to the Basics

- *“The organizational structure is pretty simple: We do the work; they take the credit.”*



Fundamentals of Regional Councils



Fundamentals of Regional Councils



- ▶ “Regional councils are sometimes less bold in structure and authority than a region’s needs might warrant, yet more advanced than area politics comfortably accept.”

- James Ray, Texas Association of Regional Councils (1978)

Fundamentals of Regional Councils



- ▶ Regional councils are political entities that must function politically to be highly effective, yet they must also act in a non-partisan manner.

- Regional Council Self-Assessment and Resource Toolkit (August 2009)

Fundamentals of Regional Councils



- ▶ Serve as forum to **craft regional solutions** for **areawide** needs and opportunities
- ▶ **Prepare plans and strategies** for broad range of regional and local issues
- ▶ Strengthen and **assist local governments**
- ▶ **Advocate for locals** at federal and state levels



Fundamentals of Regional Councils

Regional councils are knowledge-based firms.

Presentation of data, concepts and ideas are our lifeblood.

We are driven by ideas, innovations, solutions and results.

Group Dialogue and Response

- ▶ What are the top 3 issues facing your RDO?
- ▶ How are you and your organization tackling these issues head on?
- ▶ Will your organization be stronger, weaker or the same at the end of the next 12 months?

Observations from the Road



“I was checking my email on my laptop when my cell phone rang, which made me spill the coffee I was drinking. So you see, officer, it wasn’t my fault.”

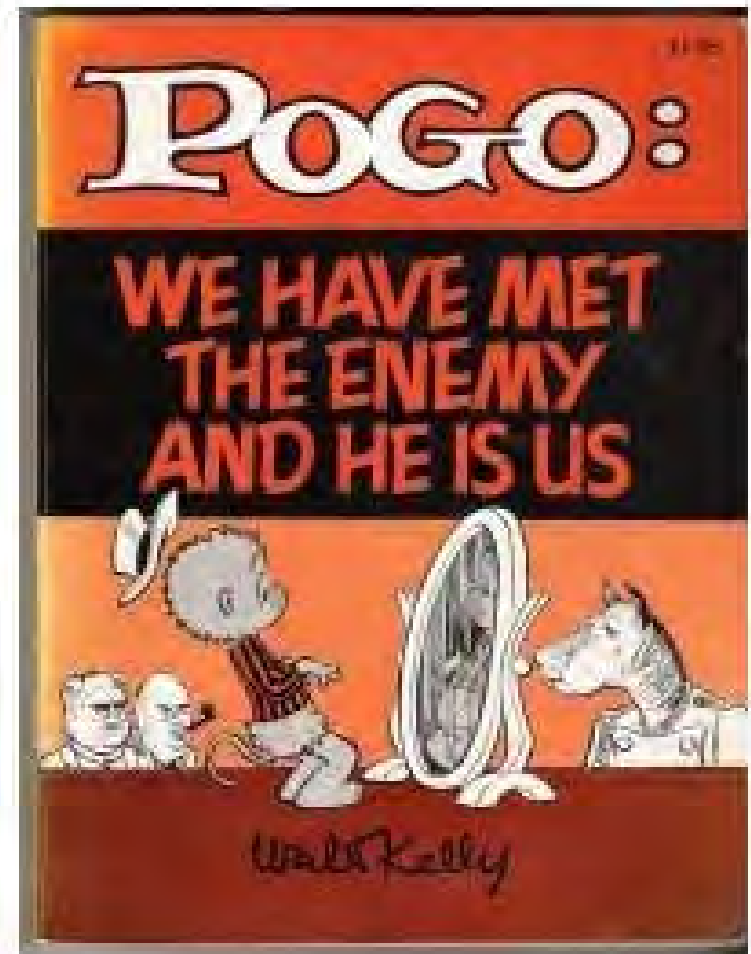
Observations from the Road



- ▶ Incredible talent and expertise across the membership and RDO industry
- ▶ Leadership, vision and commitment of the executive director matters!
- ▶ State and local govt. culture is a major factor, ***BUT*** can be overcome with message, persistence & results

Observations from the Road

▶ **We have met
the enemy,
and he is us!**



Observations from the Road



- ▶ If you are NOT organized statewide and within your region, you are ***disorganized and at great risk!***
- ▶ Even the most organized RDOs remain at constant risk (*just like any private company or community*), yet hopefully they have ***minimized their risk level!***

Observations from the Road



- ▶ Nothing is more important in the regional council profession than ***trust, relationships and results***
 - Work for political leaders at federal, state and local levels
... Politics is about self interests, power & control
 - Others control your funding, access and even results
 - Regional councils are like a company looking for investors

Group Exercise

Pop Quiz: Stay Awake!

Pop Quiz #1



- **Why are you an executive director and in the regional council profession?**
 - ▶ Great pay and benefits
 - ▶ Like position of power over people, money and decisions
 - ▶ Independently wealthy and bored with beach and golf
 - ▶ Mistake, fell into the job and need to get out!
 - ▶ Passionate about helping people and communities

Pop Quiz #2



■ How do you define your success?

- ▶ Regionally
- ▶ Organizationally
- ▶ Personally

■ Measures of Success?

- ▶ Jobs created/retained
- ▶ Grants written/secured
- ▶ Services to citizens
- ▶ Pay and benefits

Pop Quiz #3



- **How does your policy board define success?**
 - ▶ Driving the agenda and vision for the region
 - ▶ Provides timely information and resources
 - ▶ Strong financial management (i.e. Keeps them out of jail!)
 - ▶ No expectations of the organization

Pop Quiz #4



- **How do your funders define success?**
 - ▶ Delivered on promises within scope of work
 - ▶ Made political leaders look good
 - ▶ Made career professionals life easier ...
 - Submitted financial and progress reports on-time and completed
 - Quality. Completeness. Timely. Without Attitude!

Group Discussions

- ▶ How do you define success of your organization?
- ▶ Are the expectations of external funders and partners changing and what are the changes?
- ▶ Do you agree that peer accountability is key?

Groupwork

Statewide Associations

Statewide Associations



- **Face common** needs, challenges and issues
- **Improve** consistency, quality and delivery of services
- **Develop new partnerships**, programs and funding
- **Share best** practices, peer exchanges and test ideas
- **Practice what we preach** about working across jurisdictional boundaries and overcoming turf wars

Statewide Associations



- **Requirements:**

- ▶ **Significant time** and energy commitments
- ▶ **Substantial investment** of financial resources
- ▶ **Significant willingness** to compromise with peers
- ▶ **Readiness to pursue new opportunities**, hold peers accountable and share resources with peers
- ▶ **Setting realistic expectations** and goals

Roles of Statewide Associations

- **Outreach and relationship building**
with external partners, policy makers and funders
- **Program development** of new ideas and programs
- **Quality controls** and performance accountability
- **Peer networking** and professional development
- **Marketing** and branding of common statewide mission, services, impact and potential

Statewide Associations



- **Monthly meetings** of executive directors, along with working groups of senior staff and policy officials
- **Pro-active agendas** with federal and state officials
 - ▶ *Specific tasks for local policy officials, ex dirs and staff*
 - ▶ *Peer accountability for follow up and deliverables*
- **Program accountability**, including quality controls, training and financial monitoring

State Association Group Discussion

- ▶ Do you think state associations matter?
- ▶ What are the best aspects and assets of your state association? What are the barriers?
- ▶ What are the best opportunities for changing or establishing your state association in the future?



Managing an Effective Policy Board

Managing an Effective Policy Board



- Why does your board matter?
- Is your board an asset, impediment or non-factor?
- What strategies are you using to engage, reward and motivate your policy board?
- Is your board operating at policy level, operations/micro level or as a networking club?

Effective Policy Boards: Goals



- **Become a priority appointment** for local officials
- **Attract top level talent** from private, nonprofit and philanthropic sectors to board or working groups
- **Build culture** of board and member government involvement, ownership and leadership
- **Earn loyalty,** trust and respect from board members and leaders within the state and region

Basic Roles of Board and Individual Members



- **Nurture** a vision for region and organization
- **Establish organizational policies** and priorities
- **Conduct assessments** of priorities and progress
- **Ensure financial integrity** of organization
- **Participate responsibly**, knowledgably and ethically
- **Maintain partnerships** with CEO and staff

Board Development



- **Action-oriented board meetings**
- **Involve key federal, state and local officials,**
including funding partners, in meetings
- **Host regional forums and events** with high-profile national, state and regional leaders & move board meetings around the region to showcase innovations
- **Off-site strategic planning / trust building retreats**

Policy Board Orientation Ideas

- Meet with new elected officials and board members
- Ask board chair and key leaders to attend
- Share goals and mission of organization, *including explaining how RDOs differ from local government*
- Stress importance of being a regional leader
- Talk about ownership of regional organization
- Outline primary roles of policy board members
- Provide overview of key programs and services

Regional Council Resource Toolkit



- **Basic Governance Practices** of Effective Boards
- **Action Checklist** for Individual Board Members
- **Sample Job Description** for Board Members
- **Orientation Ideas** for New Board Members
- **Due Diligence Checklist** for New Board Members
- **Tips for Keeping Your Board Energized**

Group Discussion and Feedback

- ▶ What are your specific strategies for engaging your policy board members and local leaders?
- ▶ How are you educating new policy leaders about your organization and services?
- ▶ What are the various roles being played by your policy board members in your organization?

THANK YOU
FOR YOUR TIME, INTEREST
AND PARTICIPATION!

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FOR MORE INFORMATION AND TO CONDUCT
THE REGIONAL COUNCIL SELF-ASSESSMENT

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