



**A Collaborative Training Event by**



**Omni Austin Hotel Downtown  
Austin, Texas  
August 9 – 11, 2015**

**Event Agenda and Information**



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## Welcome

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Thank you for joining us in Austin, Texas for this conference designed specifically for executive directors of regional development organizations (RDOs) and regional councils (RCs). The National Association of Development Organizations (NADO) and the National Association of Regional Councils (NARC) have joined forces to provide this conference to you.

This conference was designed by and for executive directors of Councils of Governments (COGs), Regional Development Organizations, Metropolitan Planning Organizations (MPOs), and Regional Councils. Executive directors will discuss topics of critical importance to their organizations and the regions they serve. The conference will provide opportunities for networking and sharing of information on best practices.

Presentations will be made available at [www.nado.org](http://www.nado.org) and [www.narc.org](http://www.narc.org) and will also be sent to workshop attendees. We hope that you will fill out the evaluation form at the conclusion of the conference to help us continue to develop and refine our training programs for executive directors.

## Partners and Appreciation

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This event was coordinated by the National Association of Development Organizations (NADO) and the National Association of Regional Councils (NARC). We want to recognize the following organizations for their support throughout the planning process and during the conference:

- The **Texas Association of Regional Councils (TARC)** provided support for the Welcome Reception on Sunday evening.
- The **EDA Chicago Regional Office** provided support through a Financial Assistance Award to the NADO Research Foundation to provide training and technical assistance to EDDs in the Chicago Region (06-06-05883).
- The **Development District Association of Appalachia (DDAA)** and the **South West Region Executive Directors Association (SWREDA)** provided travel assistance to economic and local development district executive directors from their regions.
- The **Delta Regional Authority** for their very generous support of the overall conference.



## About NADO

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The National Association of Development Organizations (NADO) is a national membership organization for the nation's 500+ regional planning and development organizations focused on strengthening local governments, communities, and economies. Regional planning and development organizations—known locally as regional planning commissions, councils of governments, area development districts, or similar names—play a key role in regional and community economic development, business development finance, technology and telecommunications, transportation planning, workforce development, GIS analysis, disaster preparedness, and a variety of other types of services and support for member local governments.

Founded in 1988, the NADO Research Foundation is the nonprofit research affiliate of NADO. The NADO Research Foundation identifies, studies, and promotes regional solutions and approaches to improving local prosperity and services through the nationwide network of regional planning and development organizations. The Research Foundation shares best practices and offers professional development training, analyzes the impact of federal policies and programs on RDOs, and examines the latest developments and trends in small metropolitan and rural America. Most importantly, the Research Foundation is helping bridge the communication gap among practitioners, researchers, and policymakers.

## About NARC

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The National Association of Regional Councils (NARC) was created in 1965 by the National League of Cities and the National Association of Counties to respond to the professional and legislative needs of America's emerging, multi-purpose, multi-jurisdictional organizations of local governments. Various known as regional councils, regional planning agencies, councils of governments, metropolitan planning organizations and development districts, these organizations comprise NARC's membership and are at the forefront of forging regional alliances to address common, multi-jurisdictional challenges. NARC is governed by a Board of Directors made up of locally elected officials, and an Executive Directors Council. In addition to providing strategic leadership to the organization, these dedicated officials and professionals work with community leaders and citizens to build local capacity; solve regional challenges; develop and implement strategic investment plans; foster regional cooperation and economic competitiveness; and forge public and private partnerships.

NARC has advanced regional cooperation through effective interaction and advocacy with Congress, federal officials, and other related agencies and interest groups. NARC's legislative and policy agenda includes transportation, economic and community development, environment, public safety, emergency management, and a variety of community issues undertaken by its member organizations. NARC provides its members with timely information and research on key national policy issues, federal policy developments, and best practices, and conducts a variety of training sessions, conferences, workshops and webinars.

**Follow NARC on Twitter @NARCRegions**  
**Follow NADO on Twitter @NADOWeb**



## Event Logistics

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- Accommodations:** **Omni Austin Hotel Downtown**  
**700 San Jacinto**  
**Austin, Texas 78701**  
**512.476.3700**
- Conference Registration:** **Sunday, August 9:** 12:00 – 6:00 p.m. | Balcony, Ballroom Level  
**Monday, August 10:** 7:30 a.m. – 5:00 p.m. | Balcony, Ballroom Level  
**Tuesday, August 11:** 7:30 a.m. – 12:00 p.m. | Balcony, Ballroom Level
- Welcome Reception:** **Sunday, August 9:** 5:30 – 6:30 p.m. | Atrium, Lobby Level
- Conference Location:** **All plenary and concurrent sessions will be held on the Ballroom Level; the welcome reception on Sunday will be held in the Atrium on the Lobby Level**
- Attire:** **Business Casual**
- Travel:** **Austin Bergstrom International Airport:** 11 miles to hotel (about 25 minutes)  
**Taxi fare:** estimate \$30 one way  
**Super Shuttle:** reservation required, \$16 each way; 512.258.3826 or [www.supershuttle.com](http://www.supershuttle.com)  
**Capital Metro Bus:** \$1.75 each way, \$3.50 day pass; bus stop is 1 block from hotel (about 30 minutes between hotel and airport); [www.capmetro.org](http://www.capmetro.org)  
**Driving from airport:** Exit airport onto Hwy 71W. Go 1.5 miles and exit Hwy 183N. Continue on two miles to 7th Street exit. Exit 7th Street and follow three miles to IH-35. At IH-35, turn right onto access road. Take the immediate left going under IH-35 onto 8th Street. Go three blocks to 8th Street and San Jacinto. Cross San Jacinto and the hotel entrance is on left.
- Hotel Parking:** **Valet parking:** \$30 night, plus tax (includes in/out privileges)  
**Self-parking:** \$22 night, plus tax  
**Off-site parking:** contact hotel for more information





## AGENDA

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### SUNDAY, AUGUST 9

**12:00 – 6:00 p.m.**                      **Registration**    **Balcony**

**4:15 – 5:30 p.m.**                      **Executive Director Meetup**    **Capital Ballroom**

Embracing the “I am not alone” adage and tapping into the expertise of your colleagues is a powerful thing. This (mostly) unscripted session will provide attendees with ample chances to talk one-on-one with others who have gone through similar experiences. Topics will be determined based on your input. Small discussion groups will be led by facilitators.

Walk away from the Meetup with:

- New, and/or renewed, peer network to access for ideas, information, and guidance
- Examples of successful strategies and approaches taken by your peers to resolve problems
- Ideas and information to help you build your professional skills and organizational stability

**5:30 – 6:30 p.m.**                      **Creating Your Professional Community: Networking Reception**    **Atrium**

Join your peers for beverages and light snacks and an opportunity to get to know the folks you will be spending the next day and half with....and to find new (or re-connect with old) friends to have dinner with after the reception.

### MONDAY, AUGUST 10

**7:30 a.m. – 5:00 p.m.**                      **Registration**    **Balcony**

**7:45 – 8:50 a.m.**                      **Networking Breakfast**    **Lone Star**

Over a buffet breakfast, attendees will be encouraged to discuss specific topics of relevance and interest, seek solutions to challenges and problems, as well as share their ideas and successes for overcoming difficult situations.

**9:00 – 10:15 a.m.**                      **What it Takes to Become an Outstanding Leader**    **Capital Ballroom**

Enhance your leadership skills in this interactive session that will identify the attributes and characteristics of successful executive directors. The session is aimed at executive directors at all levels, no matter how long you have been in the position, the number of staff you manage, the size of your governing board, or your annual operating budget. Attendees will leave the session with a solid grasp of:

- What attributes separate outstanding leaders from average leaders
- The one key factor that makes leaders outstanding
- Three things that all outstanding leaders do

*Facilitator: Monica Scamardo, PhD, President, Variate*

**10:15 – 10:30 a.m.**                      **Break**    **Foyer**

**10:30 – 11:45 a.m.**

**Proactively Managing Change**

**Capital Ballroom**

New board members. New executive directors. New staff with different motivations and interests. Social media. Transitions from old grant programs to new ones. Change is definitely prevalent in the RDO/RC world. This session will tackle the challenges these, and other, changes present as well as showcase opportunities that these changes can bring. Most importantly, it will help you define your role within the vortex of change. During this session, you will learn:

- About the impacts and challenges of the various changes your colleagues are managing
- That 70% of change initiatives fail, and the key steps you need to know to succeed
- The critical leadership characteristics necessary to lead successful change

*Facilitator: Monica Scamardo, PhD, President, Variate*

**12:00 – 1:15 p.m.**

**Lunch and Learn:**

**Lone Star**

**What (and Who) Should I Ask to Find Out What I Need to Know?**

Are your Bylaws current? Have you ever done an IT audit? What should you include in your management contract? How should you best communicate the role your COG to your member Local Governments? What kinds of Information and Communications Technologies challenges can you expect and how can you prepare for them? What are the best ways to elicit informal input from Board members and other leaders? Should your organization have a wellness initiative, and how could it reduce benefits costs? Today's executive director needs to know a whole lot about a whole lot. A panel of seasoned executive directors will highlight key questions you should ask to be sure you are running a strong and ethical organization.

*Facilitator: Betty Voights, Executive Director, Capital Area Council of Governments*

*Panelists: David Cleveland, Executive Director, East Texas Council of Governments  
Walter Diggles, Executive Director, Deep East Texas Council of Governments  
Jim Reed, Executive Director, Central Texas Council of Governments  
Jack Steele, Executive Director, Houston Galveston Area Council  
Tom Wilkinson, Executive Director, Brazos Valley Council of Governments*

**1:30 – 3:00 p.m.**

**Concurrent Sessions**

**Austin**

**Engaging Your Board**

An engaged board of directors is an important component of a successful organization. Learn key strategies for building a board that is fully knowledgeable about the organization's mission, is a strong public voice and face, and helps inform others in the region about the positive impact of your programs and services. Attendees will learn about:

- Differences between engaged and disengaged boards
- Ways to build trust with your board
- Best practice strategies for engaging your board so they achieve results

*Facilitator: Monica Scamardo, PhD, President, Variate*



**Take the conversation beyond the conference!**  
**Share new insights and ideas using**  
**#NARNADOED**

## Taking Over and Moving Forward

Capital Ballroom

Was your predecessor a beloved leader or a hated boss? Were you promoted from within and now manage your former peers? Did you discover unknown challenges and situations that required immediate attention? No matter you got here, it is not always an easy path as you create your own style and develop your legacy. Panelists will share their lessons learned and offer their “if only I knew then what I know now” examples and thoughts. Participants will leave this session with ideas on how to:

- Overcome the “we’ve always done it this way” syndrome
- Develop your management and leadership style
- Manage expectations of your staff and board

*Facilitator:* Scott Koons, Executive Director, North Central Florida RPC

*Panelists:* Tim Armer, Executive Director, North Central New Mexico EDD  
Chris Brown, Executive Director, Ark-Tex Council of Governments  
Alene Carr, Executive Director, Southeastern Illinois RP&DC  
Lisa Daglian, Interim Executive Director, New York Metropolitan Transportation Council  
Kathleen Lomako, Executive Director, Southeast Michigan Council of Governments  
Larry Mattson, Executive Director, Yakima Valley Conference of Governments

3:00 – 3:15 p.m.

Break

Foyer

3:15 – 4:45 p.m.

**A Primer on OMB’s New Grant Guidelines**

Capital Ballroom

On December 26, 2014, CFR 200 “Uniform Administrative Requirements, Cost Principles and Audit” went into effect. The new guidelines contain many changes that will directly impact the way your organizations will conduct their daily business. This session will provide an overview of the guidelines and outline key things you should now to make sure you are in compliance.

*Speaker:* Stephen Daniels, Director, Division of Policy, Review and Resolution, US DOL

## TUESDAY, AUGUST 11

7:30 a.m. – 12:00 p.m.

Registration

Balcony

7:30 – 8:30 a.m.

**Breakfast and Conversation Café**

Lone Star

The Conversation Café will facilitate in-depth discussions and information sharing with your colleagues on a variety of topics of interest to executive directors, regardless of organization size, or your length of service. Key points from the discussion groups will be recorded and provided to all attendees. Topics may include:

- Social Media
- Evaluations: Necessary and Not Evil
- Employment Agreements
- Managing Challenging Employees
- Selecting CPA and Audit Firms
- Finding New Grant Money (Public and Private)
- Developing Revenue Streams

*Conference evaluations are very important as we plan future training events. Please be sure to take a few minutes to complete the evaluation form in your packet and drop it off at the conference registration desk before you leave. Thank you!*

**8:45 – 10:15 a.m. Concurrent Sessions**

**Rapid Fire Innovation Exchange**

Room assignments are based on the color of the dot on your name badge. After separating into three groups, each organization will present (in 5-minutes or less!) a new project, study, revenue enhancement, or any other innovation undertaken or completed by the organization in the last year. Participants will prepare for this prior to the conference. The result: more ideas for attendees to bring home for replication in their region or organization. No need to worry about missing out on the Innovation Exchanges being held concurrently: our staff will record the information shared and provide it to all attendees!

*Facilitators:* Doug Elliott, Executive Director, East Central Iowa Council of Governments  
Barry Seymour, Executive Director, Delaware Valley Regional Planning Commission  
Ty Warner, Executive Director, Northwestern Indiana Regional Planning Commission

**Yellow: Austin**  
**Blue: Congress**  
**Green: Capital Ballroom**

**10:15 – 10:30 a.m. Break**

**Foyer**

**10:30 – 11:30 a.m. Who’s Minding the Store? Fiduciary Responsibility**

**Capital Ballroom**

As executive director, you need to know enough about your organization’s financial systems to make the best decisions possible while also assuring funds are managed properly. This session will provide attendees with:

- Key things you need to look for as you review monthly financial statements
- Tips to identify red flags that need immediate attention
- Insights into ways to present financial information to the board and other stakeholders
- Mistakes your colleagues have made and how to avoid them

*Presenters:* Diane Rath, Executive Director, Alamo Area Council of Governments  
Tom Wilkinson, Executive Director, Brazos Valley Council of Governments

**11:30 a.m. – 12:30 p.m. Data and Decision Making**

**Capital Ballroom**

Learn about various forms of free and easily accessible data that you can use throughout your planning processes (including CEDs, strategic planning, and annual reporting) as well as daily decision making.

*Trainer:* Brian Kelsey, Principal, Civic Analytics, NADO Economic Development Consultant

**12:30 – 12:45 p.m. Final Thoughts**

**Capital Ballroom**

Before everyone returns home, we will convene briefly to hear from attendees about the value of *Becoming Your Best*. As NADO & NARC plan future events together, we look to you to help us craft training that meets your needs.

*Facilitators:* Joe McKinney, Executive Director, NADO  
Joanna Turner, Executive Director, NARC

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**NARC**  
Building Regional Communities