Taking Over and Moving Forward

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North Central Florida Regional Planning Council
Gainesville, FL

National Association of Development Organizations
and
National Association of Regional Councils

Executive Directors Conference
Austin, TX
August 10, 2015
Taking Over and Moving Forward

Panelists

- **Tim Armer**, Executive Director
  - North Central New Mexico Economic Development District

- **Chris Brown**, Executive Director
  - Ark-Tex Council of Governments

- **Alene Carr**, Executive Director
  - Southeastern Illinois Regional Planning & Development Commission

- **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
Taking Over and Moving Forward

- Understand Agency Finances
  - Budget
  - Financial Statements
  - Accounts Receivable
  - Accounts Payable
  - Cash Flow
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- Board Relations
  - New Member Orientation
  - Communications
  - Roles and Responsibilities
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- Organizational Documents
  - Interlocal Agreement or Charter
  - Bylaws
  - Policies and Procedures
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- Imprint Your Organization
  - Logo/Letterhead
  - Building
  - Meeting Protocol
  - Employee Benefits
  - Staff Reorganization
Taking Over and Moving Forward

Questions

1. Why are we doing it this way?
2. Are these programs and services right for today?
3. Who are the key stakeholders in the region?
4. Who can you count on to get things done?
5. Where should we be in five years?
What I wish I Knew – and Then Some

Becoming Your Best: Training for Executive Directors
August 9-11, 2015
Tim Armer
First 30 days — "Yeah, she applied for your job because she hates you because..."

Day 10 — "Oh, by the way, we have this lawsuit..."

Month 3 — "Well which policies and procedures do you want? We have about 4 or 5.

"The Little Details"
“It happens with a new Director – it can’t be avoided

It is constant

Nobody likes it

The response will make a team or break it

Building trust and mastering conflict - *The Advantage*, Patrick Lencioni
Who Knows?

“State Association – NewMARC
Regional Association – SWREDA
National Association – NARC,
NADO
"Why did my predecessor always start my introductions with, "Tim was born and raised in New Mexico"?

"My Board President was installed when I was 11 months old

"I have 4 board members who have been in public service longer than I've been alive

"All my board members have known my staff two years or longer before I came on
The Little Details – Can you put all the cards on the table?

Change – How do we handle change?

Who knows? – cling to a mentor and the phone is your friend

The New Kid – Why should they trust me? Initiate, initiate, initiate with your Board and member governments
Evaluating existing Managers
(what I wish I knew then)

What a Board needs

Following a Legend
Walked in to:

- 10 Programs/Department Managers
- 1 Direct Manager due to funding
- Finance/Admin Director announced retirement
- Discovery of Vendor fraud
Communication
TOP 5
Things Every New Director Might Need To Know.

1. There will always be 1st that come along!
2. Use the “Sorry, I’m new at this” card as long as you can!
3. EDA and NADO are your friends!
4. You will be the “Bad Guy/Gal”
5. Expect The Unexpected
Taking Over and Moving Forward

Lisa Daglian
Interim Executive Director
New York Metropolitan Transportation Council
The differences between a **BOSS** and a **Leader**

- Drives employees
- Depends on authority
- Inspires fear
- Says “I”
- Places blame for the breakdown
- Knows how it’s done
- Uses people
- Takes credit
- Commands
- Says “Go”

- Coaches employees
- Depends on goodwill
- Generates enthusiasm
- Says “We”
- Fixes the breakdown
- Shows how it’s done
- Develops people
- Gives credit
- Asks
- Says “Let’s go”
Yakima Valley Conference of Governments
What You Inherit...
Kübler-Ross Grief Cycle

Denial
- Avoidance
- Confusion
- Elation
- Shock
- Fear

Anger
- Frustration
- Irritation
- Anxiety

Depression
- Overwhelmed
- Helplessness
- Hostility
- Flight

Bargaining
- Struggling to find meaning
- Reaching out to others
- Telling one's story

Acceptance
- Exploring options
- New plan in place
- Moving on

Information and Communication
Emotional Support
Guidance and Direction
First challenge...
[Selling] the benefits of regional problem-solving...