

NEW DIRECTOR TRAINING

NADO ANNUAL TRAINING CONFERENCE

SAN ANTONIO, TX

OCTOBER 15, 2016

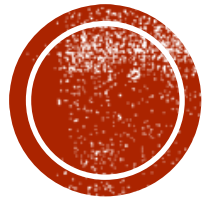


ABOUT THE SPEAKER

- Steve Etcher
 - MarksNelson, LLC
 - Manager, Location Strategies
 - Community EDGE, LLC
 - Vice-President
 - Boonslick Regional Planning Commission
 - Executive Director
 - NADO Board of Directors
 - Missouri Association of Council of Governments

MarksNelson LLC
MOVE FORWARD  *Certified Public Accountants
and Business Advisors*





REGIONALISM

REGIONALISM: a committed effort to improve communities through increased coordination and collaboration, maximizing efficiency through united approaches while preserving individual aspirations.

SESSION FOCUS

Professional Development

Organizational
Development

Organizational Management

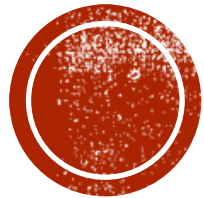


Leading an organization is like riding a bike... you need to keep moving forward to keep your balance



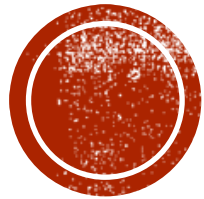
CONTENT





HOW IT ALL BEGAN

My story as a Regional Development Organization Director

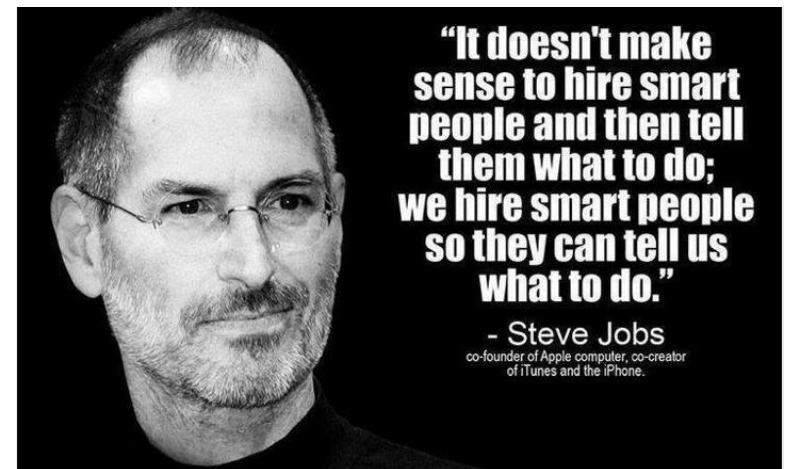
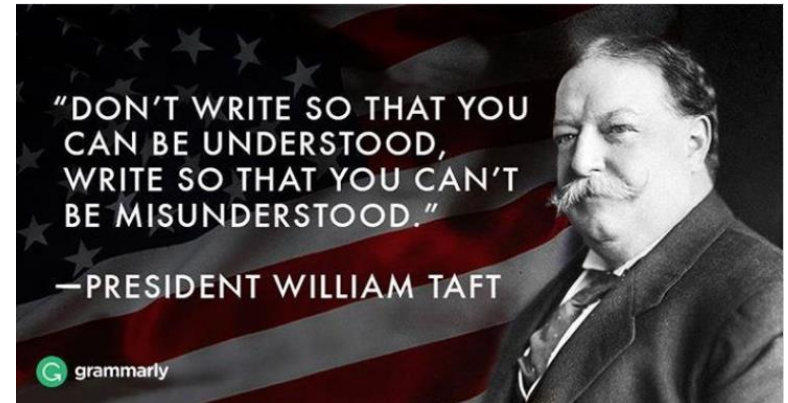


**WHAT I WISH I KNEW
WHEN I STARTED...**



WHAT I WISH I KNEW WHEN I STARTED...

- Burnout is real
- Arrogance achieves little, humility achieves much
- It's never wrong to do the right thing
- Be open and transparent in all that you do.
- Communication is critical
- Don't pursue self interests--do what is best for your region, members and organization
- Surround yourself with people smarter than yourself
- Learn as much as you can from others
- It's OK to be lucky.
 - Luck = Opportunity x Preparedness



POTENTIAL ISSUES FACING NEW LEADERSHIP



Positive

- Following a legend
- Inherit a strong board
- Inherit sound financial condition
- Have a trained and competent team
- Strong and compatible organizational culture
- Growth
- High morale and enthusiasm

Negative

- Following a loser
- Disengaged board
- Financial crisis
- Lack of skills, talent, and team effort
- Dysfunctional organization
- Decline
- Low morale, low energy in organization



NEW DIRECTOR CHALLENGES

If Hired from within

- Managing former colleagues and peers
- Board perspective of your new role
- Seeing the big picture
- Shaping the culture to fit your style

If Hired from outside the organization

- Understanding the region and its players
- Understanding the organizational culture
- Grasping the breadth of programs and services
- Unaccustomed to staff and practices
- Need to “hit the ground running”





No one else cares as much about your organization as you, and no one else has as much to gain or lose as you as the executive director.

LEADERSHIP DEVELOPMENT

LEADERSHIP DEMAND

- Building leadership remains paramount,
- As the economy recovers, companies see an accelerating demand for leadership at all levels, especially among Millennials.
- Only 6 percent of companies feel fully ready to address their leadership issues, only 10 percent feel comfortable with their succession program



REGIONAL LEADERSHIP QUALIFICATIONS

High octane, high energy, self starter

Great communicator

Creative entrepreneur

Visionary

Consensus builder and motivator

Open minded

Results oriented

Decision maker

Trustworthy



TWO MOST IMPORTANT KEYS TO EFFECTIVE LEADERSHIP

- You must be trustworthy
- You must be able to communicate a vision of where the organization needs to go.

"A leader takes people where they want to go. A great leader takes people where they don't necessarily want to go, but ought to be."

Rosalynn Carter



LEADERSHIP SHORTCOMINGS

- Lack of “big picture” focus
- Too detailed and process oriented
- Failure to recognize key product is intellect
- Complacency

“The problem is not the problem. The problem is how you think about the problem. We can not solve our problems with the same level of thinking that created them”

Today’s leadership coaches spend a great deal of time on qualities such as vision and communication skills, but one important element is often missing: character development. The kind of character I am referring to is being truthful – say what you mean; mean what you say; and back up what you say with action.





REGRET

IT HURTS TO ADMIT WHEN YOU MAKE MISTAKES-
BUT WHEN THEY'RE BIG ENOUGH, THE PAIN ONLY LASTS A SECOND.



KEYS TO LEADERSHIP SUCCESS

- Allow and encourage innovation to fuel the organization
- Need to think outside the box-offer fresh perspectives to chronic challenges
- Delegate to trusted and qualified staff
- Avoid getting drug into the mire of projects--lead projects
- Surround yourself with people that are smarter than yourself, that complement your style of leadership, offset your limitations
- Find a mentor
- Lead with humility
- Running and growing an agency requires high levels of energy and ambition—understand your need to re-energize
- Don't forget to plan for your own organization--set goals
- Don't forget to set goals for yourself
- You are paid to make recommendations and to lead, do not avoid this responsibility

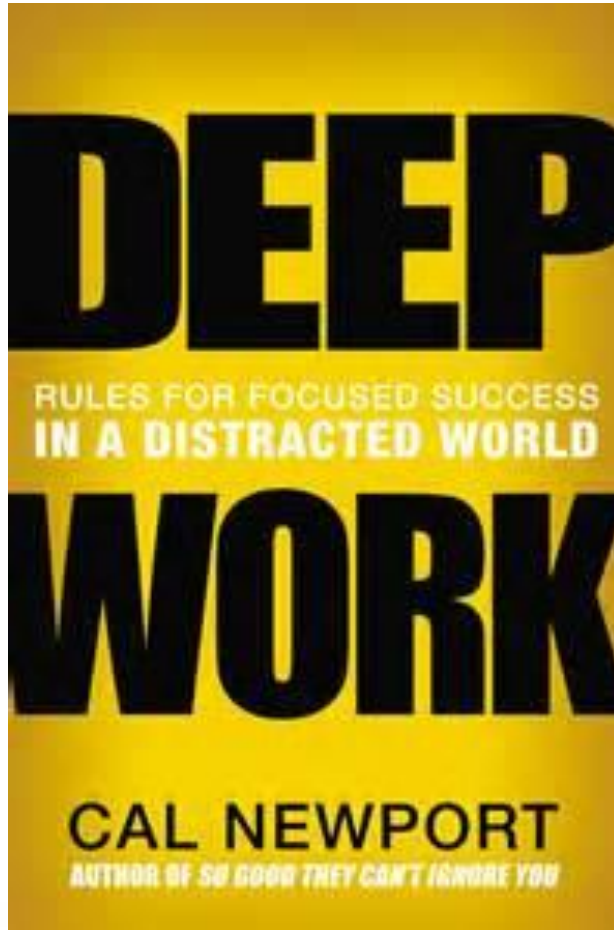


PRINCIPLES OF LEADERSHIP

- Know yourself and seek self-improvement
- Be technically proficient
- Seek responsibility and take responsibility for your actions
- Make sound and timely decisions
- Set the example
- Know your people and look out for their well being
- Keep your workers informed
- Develop a sense of responsibility in your workers
- Ensure that tasks are understood, supervised, and accomplished
- Train as a team
- Use the full capabilities of your organization



DEEP WORK BY CAL NEWPORT



Group Discussion-Time and Task Management

- You are the Executive Director of a regional development organization. As the Director you have countless demands for your time and attention.
- *As the Director, how do you manage your time and tasks to make sure all things get done and the most important things get the priority attention they deserve?*



INDUSTRY TRENDS

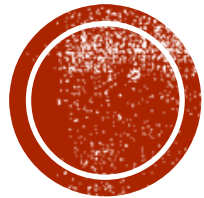
- Issues and challenges are becoming far more complex
- Non-traditional partnerships are being formed to maximize resource utilization
- The “INDUSTRY” is transitioning
- Trickle down problem solving



Group Discussion-Leadership

- You are the Executive Director of a regional development organization due to budget constraints your organization is doing more with less. As a director you are juggling multiple projects and initiatives in addition to running the organization—resulting in late nights at the office and spending weekends getting caught up. You are beginning to suffer “burn out” on the job.
- *As the Director of the EDD, how do you prevent burnout, how do you recharge your batteries, how do you find the motivation to get the job done?*





MISSION AND PURPOSE

Mission Statement

Mission: to improve the economic prosperity in the region by working together to address the needs of our businesses, citizens and communities

KNOW YOUR REGION

Demographics

Constituents

Challenges





PERFORMANCE EVALUATION AND BENCHMARKING

“What gets measured gets done. What gets measured and fed back gets done well. What gets rewarded gets repeated.”

EVALUATING PERFORMANCE

Measure **RESULTS** not activity

Identify the key **ELEMENTS** to measure

Establish **BASELINE** for historical comparison

Identify **COMPETITION** to measure/benchmark against

Evaluate and **REPORT** progress, impact, and value

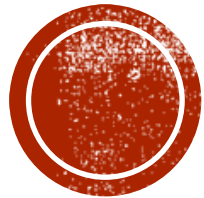
RAISE the bar once goals have been met



IDENTIFY KEY MEASURES FOR YOUR REGION

- Poverty
- Employment
- Earnings
- Housing choices
- Commuting time
- Safety
- Education
- Valuation
- Primary Employers
- Spending
- Health
- Access to opportunities





ORGANIZATIONAL MANAGEMENT & GOVERNANCE

Successful, impactful organizations share a common feature—they have a board of directors that is engaged, understands their role, and contributes their talents and expertise to the success of the organization

HOW TO EFFECTIVELY ENGAGE YOUR BOARD MEMBERS



Have regularly scheduled meetings that encourage participation

Have a structured meeting format to make the most use of their time and provide value to the members

Have an agenda and stick to it. Stay within the time constraints set up for the meeting

Utilize committees as appropriate to streamline the policy debate, make recommendations, and broaden board member engagement.

Create Ownership by the Board—as appropriate with your enabling legislation. Constantly reinforce their ownership versus ownership by the Executive Director



KEYS TO LEADING A BOARD OF DIRECTORS

Ask them their opinions

Allow them to take ownership in ideas.

Provide value to them through information, and project results.

Filter and interpret data to provide meaningful information.

Board education is critical and must be constant.

Immediately educate and include newly elected officials and appointed board members



ROLES AND RESPONSIBILITIES

Board Members

Set Policy and Priorities

Oversee and Maintain Partnership with Director (CEO)

Ensure Financial Integrity of Organization

Nurture a Vision

Assess Performance

Participate responsibly, ethically and knowledgably

Director (CEO)

Recommends and Carries Out Board Policies and Priorities

Manages Day to Day Operations

Maintains Organizational Relationships

Oversees Staff

Communicate with Board of Directors

Reports Performance and Impact



BOARD OF DIRECTORS DO'S AND DON'TS

DO's

- Learn all you can about your members—spouse's name, children, occupation, etc.
- Remember important events such as election cycles and years in office.
- Communicate with your members between meetings using email, handwritten letters, phone calls, or visits.
- Invest time in your members because you are asking them to invest time in you and your organization.
- Be consistent in all your communication—tell all board members the same thing. Don't gossip.
- Address board members by their title and last name—it's a sign of reverence and respect. To get respect you need to give respect.
- Encourage diversity and youth on your board as appropriate

DON'Ts

- Avoid personal relationships with members.
- Do not address board members only by their first name in a meeting.
- Do not ignore phone calls or emails from board members.
- Do not get involved with politics and elections.
- Don't PRETEND to have all the answers
- Don't give lengthy technical or detailed responses to a question—be concise and informative
- Don't be defensive—accept constructive criticism
- Don't only talk to your members about activities—reinforce the mission, purpose and strategic objectives the organization is pursuing



GOVERNANCE

- Who Needs To Be At The Table
- Is it clear who owns your regional council?
 - Local governments
 - Federal, state and local funders
 - General public
 - All of the Above
 - ***Note: It isn't the Executive Director!***
- Most regional councils, by law or executive order, are established as voluntary **councils owned and governed by local governments**
 - **HOWEVER, in many cases local officials:**
 - Are unaware of regional council functions & programs
 - Do NOT realize regional councils are set-up to serve them
 - Do NOT consider themselves as owners



GOVERNANCE

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



Governance

- How would you describe your Board member's understanding of their responsibilities:
 1. just shows up at meetings
 2. understands they are responsible for approving organizations actions
 3. understands their role of oversight
 4. clearly understands of their role but not as clear on the "ownership" of the organization
 5. clear understanding of their role and the "ownership" of the organization



Governance

- **Questions to ponder:**

- 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 a:
 - policy level,
 - Operations level (micro-managing),
 - or as a networking club?



Governance

1. How many members on the board of directors?
2. How many members in the organization?
3. How often does the Board of Director meet?
4. How often does the membership of the organization convene?
5. What constitutes a quorum?
6. Does the organization maintain minutes of all meetings and actions of the Board of Directors and membership meetings?
7. Who is responsible for maintaining organization's minutes and records?
8. Are minutes made available to the general public? If so, how?



TIPS FOR RUNNING BOARD MEETINGS

- Understand the most convenient date and time for your members to meet—make it convenient for your members-not just what works best for you or what has always been done
- Meet with your chairman in advance to set the agenda and discuss agenda items
- Develop an agenda and stick to it.
- Respect members time—keep meeting on schedule
- Provide ample notice for the meeting date, time and location
- Send board packets out a week in advance of the meeting—agenda, minutes, financials, policies, action items, and reports.
- Have at a minimum coffee, water, and a light refreshment
- Arrange the room so members are facing one another to promote good dialog
- Make sure if necessary you have a PA system



TIPS FOR RUNNING BOARD MEETINGS

- Use A/V as needed—don't overdo the PowerPoint presentations
- Control the room temperature—anticipate impact of a large crowd
- Allow your chairman to run the meetings and let him defer to you for additional information
- Provide the chairman with annotated agenda with key information—make the chairman look good (competent)
- Know where you and the staff should sit during the meeting.
- Don't allow staff to blurt out during the meeting/discussion
- Personally greet your board members when they arrive
- If large board with unfamiliar members-prepare name tents or name badges
- Introductions can be appropriate-manage the time element
- If assigning seats for your board members—know any personality conflicts that may exist between board members



TIPS FOR RUNNING BOARD MEETINGS

- Don't overdress for board meetings
- Be prepared to accommodate the press and the public
- Be prepared to offer your recommendation—that is what they are paying your for.
- Provide content of value to the members
- Address board members by their title, not their first name
- Correctly pronounce board members names
- Turn off your cell phone during the meeting—You are not that important
- Avoid passing out papers during the meeting-have it at their table or send in the packet.
- Use color paper to manage handouts
- Avoid the use of acronyms with the board
- Know your by-laws and Roberts Rules of Order
- Use committees as appropriate and beneficial
- Always be prepared for the meeting—anticipate questions, prepare for the unexpected.

▪ Source: Various RPC Directors



Group Discussion-Engagement

- You are the Executive Director of a regional development organization. Due to large turnover in elected officials during last year's election your board composition has drastically changed. It is difficult to gain a quorum at the monthly meetings; some members “doze off” during the three hour meeting; all they seem interested in is what type of cookies await them upon adjournment.
- *As a director, how will you address this situation?*





FINANCIAL MANAGEMENT

Financial management and stewardship of public resources are critical to the success of regional development organizations.

KEYS TO FINANCIAL MANAGEMENT

- Have a financial management procedures manual—serves as an agreement, a list of responsibilities between you and the staff assigned to handle the finances of the organization
- Hire trustworthy, competent, experienced staff
- Oversee the financial staff directly—they report to you!
- Maintain fidelity insurance on all staff and board members that are involved with the financial process
- Separate duties as much as possible
- Educate yourself if are not 110% confident in your financial aptitude
- Have an audit done every year by an independent accounting firm
- Meet with the auditor to get his opinion on the financial practices of the organization
- Sit in on the exit conference with the auditor and your staff
- Don't just think of financial management as statements of historical activity-you need to project the financial condition of the organization-to lead the organization



FINANCIAL MANAGEMENT

What the Director Needs to Know & Understand

Cash inflows and outflows are different from revenues and expenses.

Budgets are blueprints for the future...plans.

Financial statements are historical; they report what happened in the past.

Financial projections are critical to addressing current and future needs

What the Board Needs to Know & Understand

What resources the organization has.

Sources of fund to acquire resources and provide services (Assets)

How the organization has performed financially



FINANCIAL STATEMENTS

Balance Sheet

Financial **status** report.

Shows financial position at a position in time.

Usually prepared last date of accounting period.

Income Statement

Financial **performance** report.

Covers the duration of the reporting period.

Cash Flows

Explains the reason for change in CASH during the accounting period.

What were the sources of cash inflows?

What were the uses of cash outflows?

Can help you anticipate a need for cash



FINANCIAL PRACTICES

- Adopt an annual operating budget
- Present the budget to the Board of Directors for adoption
- Prioritize accumulating sufficient financial reserves
- Prioritize eliminating any indebtedness (exception=building)
- Know how your organization's operating budget is trending
- Develop a financial procedures manual
- Contract for an annual independent financial audit
- Maintain bonding/fidelity insurance on key employees
- Develop an indirect cost plan or rate
- Provide monthly financial statements to the Board of Directors
- Require multiple signatures on all checks



FINANCIAL REPORTING—COMMUNICATING WITH THE BOARD

- Be transparent at all times.
- Be direct at all times.
- Be truthful, don't use numbers to paint the wrong picture.
- Don't use jargon or technical language the board may not understand
- Use dashboards, graphs and summary reports to present the data in meaningful way
- Be consistent with financial reporting, use the same(effective) format each meeting to create familiarity
- Tie the budget and financial activity to how that helps achieve the organization's purpose and focus
 - Remembers a financial statement is only a snapshot of a specified period of time. It may be necessary to provide trend data for you and the board to understand long term implications.
- Distribute financial reports in advance of the meeting to allow members to review, understand and ask questions
- Offer training to your board members to enhance their understanding of the organization's financial structure and performance



FINANCIAL MANAGEMENT

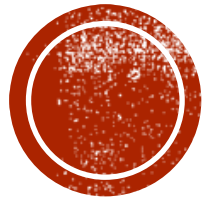
1. How do you talk accounting lingo with non-accountants?
2. Do you know who your cognizant agency is?
3. Do you have an indirect cost allocation plan?
4. How do you handle delinquent invoices or dues from members?
5. Do you have an accounting procedures manual? If so, does your fiscal staff understand and abide by it?
6. Do you have offsite storage for paper and electronic records?
7. Who is your financial software vendor?



Group Discussion-Financial Management

- You are the Executive Director of a regional development organization. You have recently been hired to run the organization. In your new position you discover that the organization has scant financial resources and has been deficit spending for a couple of years, nearly depleting the cash reserves.
- The current budget is over optimistic on revenues and still shows nearly a deficit spending level of 10% of projected revenues. When you were hired the board assured you the organization was financially strong and they want to keep it that way.
- *As the Director how will you manage this “situation” for the organization and how will you communicate this with your board?*





STAFFING

New Executive Director Training

STAFFING FOR REGIONAL ORGANIZATIONS

- Staffing for a regional development organization is best described as “talent management”
- Talent management is the practice of attracting, retaining, developing and promoting outstanding talent to serve the organization.
- Talent management should be formed from the organization's mission, values, and goals.
- An effective talent management system helps employees feel as if they are part of something bigger than their current job

What happens if we invest in developing our people and they decide to leave? What happens if we don't and they stay?



STAFFING FOR REGIONAL ORGANIZATIONS

- Without the right talent in key areas, you run the risk of missing out on emerging opportunities.
- You need to constantly be planning ahead –identifying and nurturing future leaders.
- You need to understand how to attract today’s emerging talent
- You need to be able to offer the necessary challenges and career development to motivate/retain top performers
- You need to weed out poor performers, poor performers undermine productivity and erode morale.



EMPLOYEE EVALUATIONS

- *Hiring employees means evaluating employees. Both you and your employees need to understand exactly what is expected of them so that it is clear to everyone whether they are performing adequately or at a level that is more or less than adequate.... Employees should know what they do well; they should also know what they need to improve.*

Business.com (April 2011)



PERFORMANCE EVALUATION

- **“Because what gets measured gets done”.**
 - Peter Drucker
- ***“What gets measured gets done. What gets measured and fed back gets done well. What gets rewarded gets repeated.”***
 - John E. Jones



REALITIES OF THE RDO WORLD

- RDOs are knowledge firms—judged by what we know and what we accomplish
- RDOs are public agencies-difficult for the public to comprehend the uniqueness and complexities of what we do, let alone understand and appreciate our value
- RDOs primary expenses-cost of goods is personnel, we have to therefore be effective managers of human capital to fulfill expectations
- Public service has an interesting definition by the general public.
- RDOs must thrive through innovation, problem solving, collaboration, and creativity. These are tough metrics to measure
- RDO's customers/audience/members are changing more rapidly through the election process and may be unfamiliar with the tasks mission of the organizations
- RDOs face a constant battle to avoid a bureaucratic label and instead create an image of relevance, efficiency and effectiveness. RDOs operate and deliver federal, state , and local government programs and as such people view us as government employees versus social entrepreneurs.



EMPLOYEE EVALUATIONS

- EDDs spend 60-80% of expenses on personnel costs
- Employees deal with a myriad of people with a stake in the organization
- Policies and Procedures need to be developed to:
 - Reward superior performance
 - Hold marginal employees accountable
- Policies must be administered according to principles of:
 - Equity
 - Efficiency
 - Effectiveness
- Performance standards must be designed to promote the goals and values of the organization



PITFALLS OF PERFORMANCE EVALUATIONS

- Supervisory staff not trained in doing evaluations
- Evaluation criteria is vague, never communicated in writing, not realistic, not results oriented.
- Measures only a single point in time—doesn't consider the entire evaluation period
- Not bilateral in communications
- Measures the wrong criteria
- Stockpiling of shortcomings throughout the year and unload on the employee during the annual evaluation



EMPLOYEE EVALUATIONS

- Define Expectations
 - Define what is expected of the employee
 - Make sure goals are measurable and observable
- Create Goals
 - Discuss the goals with the employee
 - Obtain the employee's agreement and signature
- Provide Written Evaluations
 - At least annually, more frequent if needed
 - Ensure evaluations reflect the entire evaluation period
- Maintain a Performance Record
 - Make written notes throughout the year
 - Do both praising and correcting in real time
- Ensure Integrity of Evaluation
 - Written comments should be factual, detailed and constructive
 - Performance criteria shouldn't be changed arbitrarily
 - Evaluations shouldn't digress from the measures initially identified.

MANAGING PEOPLE BETTER



EMPLOYEE EVALUATIONS

- SMART Goals for Employee Evaluations
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time based





RISKS

IF YOU NEVER TRY ANYTHING NEW,
YOU'LL MISS OUT ON MANY OF LIFE'S GREAT DISAPPOINTMENTS.



TIPS FOR HIRING STAFF

1. Do credit check and criminal background checks for all new employees.
2. Verify that stated degrees are legitimate
3. Research social media sites for applicants and/or employees
4. Have a staff manual that includes personnel policies, statement of benefits, organizational charts, etc
5. Develop strategies to reduce turnover rate
 1. Make “cross training” a priority, eliminate functional silos?
 2. Seek measure(s) that evaluate the competitiveness of your salaries and benefits



DETERMINING STAFF COMPENSATION

- Seven Factors for Determining Staff Compensation
 - The value of the job to the Organization
 - Position in the salary range (support staff, professional staff, managerial staff)
 - Competence
 - Performance
 - Experience
 - Education/Credentials
 - Economics
 - Employer
 - Employee



Group Discussion-Staffing

- You are the Executive Director of a regional development organization and one of your staff, who is assigned to lead a critical regional project, is speaking negatively about your organization, its board, and its director in public.
- *As the Director how will you handle this situation?*



Group Discussion-Staffing

- You are the Executive Director of a regional development organization. You have recently been hired for this position. A board member has approached you about a job for one of his/her family members.
- *As the Director how will you handle this situation?*



Group Discussion-Employee Evaluation

- A long term employee who oversees a vital program in the organization is not making reasonable or appropriate gains in learning to utilize technology in the delivery of the program. He/she has been given numerous opportunities to take classes to improve his/her technological skills, some during work hours, some on the employee's own time.
- The organization has been willing to pay for this professional development. A few classes are attended during the working hours, but none beyond that. The implementation of new technologies or the utilization of existing technologies by this employee has been void-almost negligible.
- *How would evaluate this employee and how would you use the evaluation process to create a change in behavior?*



Group Discussion-Employee Evaluation

- You have hired a new “Millennial generation” employee to work in your organization doing mapping, and data research and evaluation.
- The employee has been on the job for 2 years and does a fantastic job of mapping, gathering and interpreting data and meeting project objectives and deadlines.
- During the employee evaluation process last year he/she was critically evaluated for his/her work habits and attendance.
- The employee has not made any improvements to his/her punctuality or modified his/her work habits.
- *How would you use the employee evaluation process to gain the results desired of the organization?*



Group Discussion-Employee Evaluation

- You have recently hired an employee to work on a special community project. Though highly qualified for the job and producing the desired project results, the employee is not fitting into the culture of the organization (The culture is focused on teamwork, creativity, innovation and customer service)
- The employee does poorly at interpersonal relationships in the office, doesn't share information freely or collaborate with other staff members working on the same project, nor does the employee take calls from member communities when "working on a project".
- *How would you evaluate this employee and use the evaluation process to get him/her to fit into the culture of the organization?*



Group Discussion-Employee Evaluation

- You have an employee that has been with the organization a number of years. The employee has lot of positive attributes, does good work, meets project deadlines, and produces high quality products and results.
- However, the employee is chronic gossip. The employee is talking to or about someone every chance they have—and not necessarily in a positive light.
- You have critically evaluated the employee in the past for this action, particularly what is said, how it is said, and to whom things are being said. In addition to chiding them for not using their time appropriately.
- After evaluations the gossip diminishes in the office for a while, but weeks or months later, the habit begins again.
- *How would you evaluate this employee and use the evaluation process to modify this behavior?*



Group Discussion-Employee Evaluation

- You have an employee that has been with the organization nearly 3 years. The employee has learned the job duties quickly, is a team player, has a great attitude, and is generally liked around the office and by the customers.
- In prior evaluations you have critically evaluated the employee for the neatness and quality of their work—particularly noting their lack of attention to detail on reports.
- Errors continue to occur and the final products produced is often a poor reflection on the professionalism of the organization.
- Not to mention the employee's office is a complete mess, totally trashed, all the time.
- *How would you evaluate this employee and use the evaluation process to achieve the desired results*



Group Discussion-Employee Evaluation

- You are the Executive Director of a regional development organization. You have recently been hired as the Director. After a month on the job, you realize that moral in the office is terribly low, productivity is down, innovation and creativity are absent. Employees are very protective of their turf—to the point they hesitate sharing information with you as the Director
- *How would you handle this situation?*



Group Discussion-Employee Evaluation

- You are the Executive Director of a regional development organization. You have recently been hired as the Director. As you begin your tenure as the Director you notice that the staff members come in whenever they want, take exceptionally long lunch periods, and spend a lot of time around the coffee pot. When 5:00 hits, there is a stampede by the back door to leave the office.
- *As the new Director how will you go about changing the culture of the organization?*



Group Discussion-Preparedness

- You are the Executive Director of a regional development organization, your region has just been impacted by a major natural disaster. How do you prepare and position your organization to assist with the disaster **RESPONSE** and the disaster **RECOVERY**
- *What risks are you willing to take as an EDD?*
- *How do you get invited to the table?*



BECOMING YOUR BEST MESSAGE TO EXECUTIVE DIRECTORS

- Know your strengths as an Executive Director
 - Utilize these strengths to improve the organization
- Recognize your shortcomings/weaknesses as an Executive Director
 - Staff to compliment your strengths and strengthen your shortcomings
- Develop a personal improvement plan
- Create an organization plan and implement it
 - Include short and long term goals, measurements and timelines
- Prioritize and maintain board member engagement
 - EDDs are experiencing high turnover in elected officials
 - Develop a process for orientation to the organization and create a sense of ownership
- Share information, not data
 - Know and understand the board preferences on the “right amount” of information
- Performance evaluation is vital
 - Create a process for fair evaluation of you, your organization and your staff,



IMPACT

- I** Influencing decisions and regional development
- M** Maintaining trust relationships
- P** Partnering with regional players
- A** Accountability to constituents is a priority
- C** Creativity and innovation is your trademark
- T** Tackling chronic challenges with a fresh perspective



CONTACT INFORMATION

Steve Etcher

setcher@mnlocationstrategies.com

636.359.0114



MarksNelson LLC
MOVE FORWARD  *Certified Public Accountants
and Business Advisors*