



MarksNelson

Move Forward

EDD LEADERSHIP FORUM

Building a Strong & Sustainable Organization

Kansas City, MO

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About the Presenter



> Steve Etcher
Manager, Location Strategies

- > Career Highlights
 - > 20+ years RDO Director
 - > NADO Board of Directors
 - > 10 years Economic Development and Site Selection
- > Specialties
 - > Community & Economic Development
 - > Organization Management and Consulting

Creating Organization Focus Strategic Action Plan

Vision

- *Where do we want to be in the next 10 -20 years?*

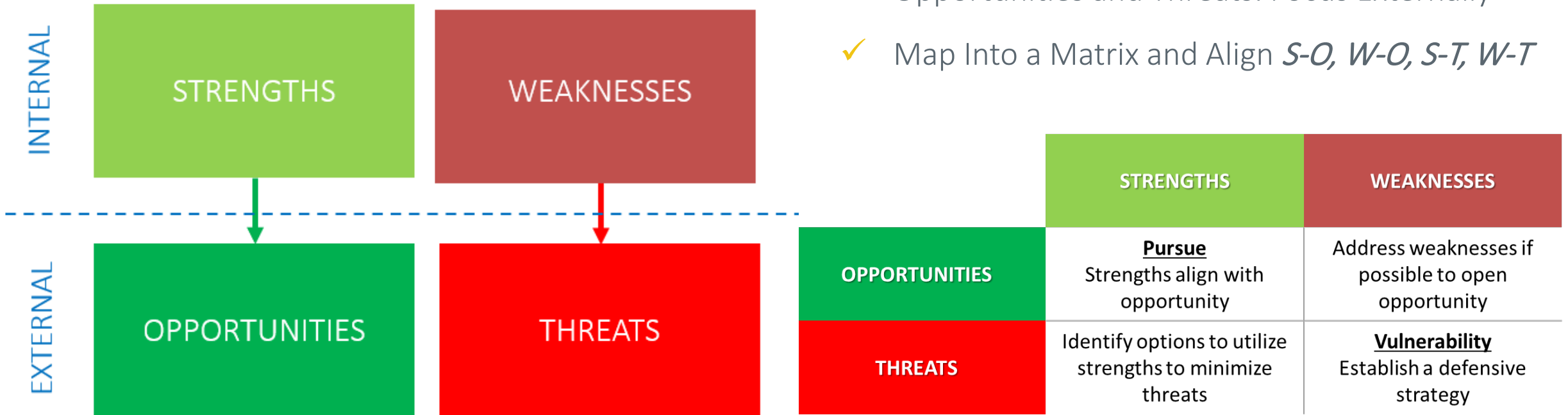
SWOT
Analysis

- *Where are we now?*

Goals

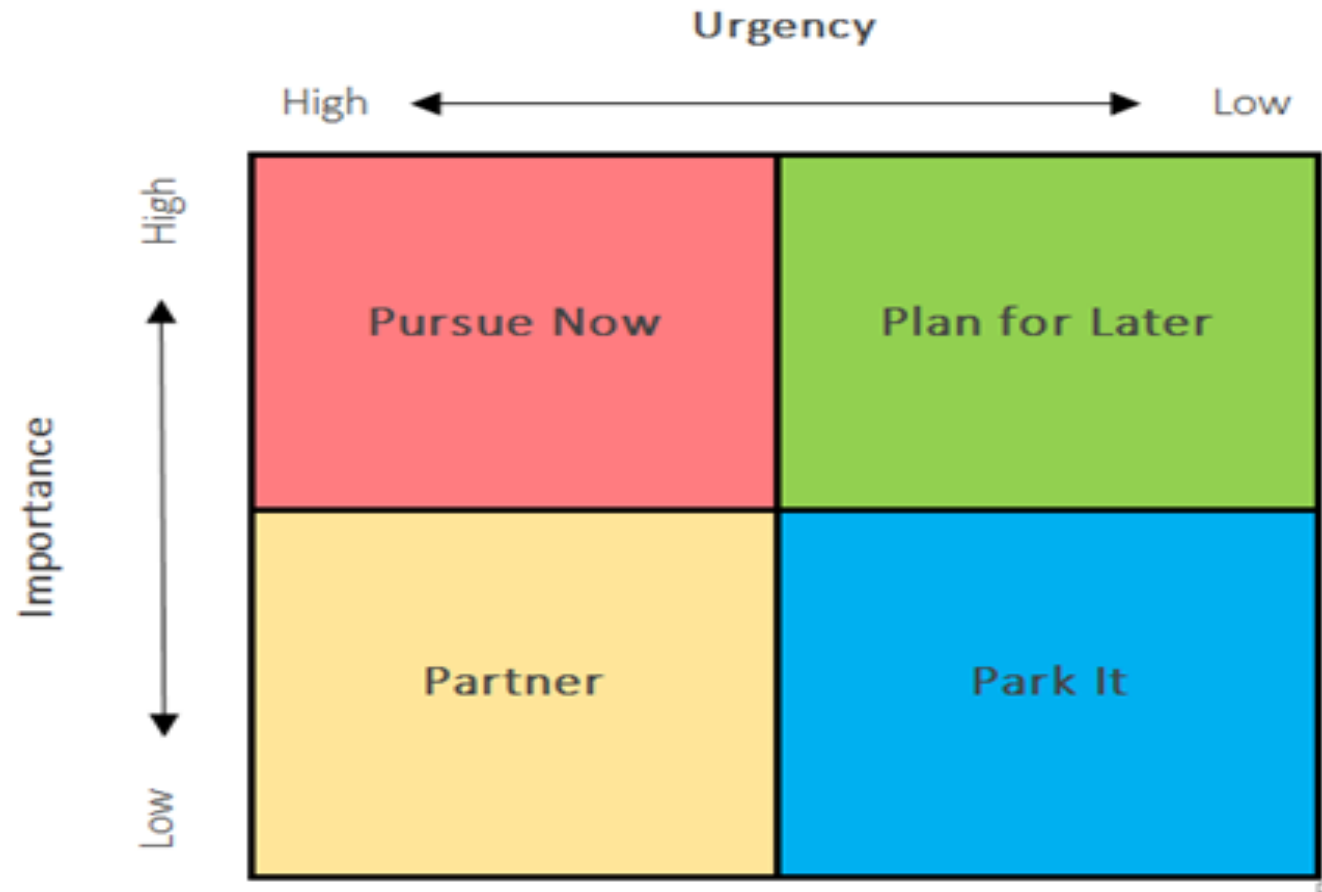
SWOT ANALYSIS

- ✓ Strengths and Weaknesses: Focus Internally
- ✓ Opportunities and Threats: Focus Externally
- ✓ Map Into a Matrix and Align *S-O, W-O, S-T, W-T*



Prioritization

The Eisenhower Matrix



Board Engagement

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

- 1. Have regularly scheduled meetings that encourage participation
- 2. Have a structured meeting format to make the most use of their time and provide value to the members
- 3. Have an agenda and stick to it. Stay within the time constraints set up for the meeting
- 4. Utilize committees as appropriate to streamline the policy debate, make recommendations, and broaden board member engagement.
- 5. 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

- 1 Ask them their opinions
- 2 Allow them to take ownership in ideas.
- 3 Provide value to them through information, and project results.
- 4 Filter and interpret data to provide meaningful information.
- 5 Board education is critical and must be constant.
- 6 Immediately educate and include newly elected officials and appointed board members

State Associations

NADO Toolkit for State Associations

<http://www.nado.org/wp-content/uploads/2011/08/statereport.pdf>

**STATE ASSOCIATIONS OF
REGIONAL COUNCILS OF GOVERNMENT &
REGIONAL DEVELOPMENT ORGANIZATIONS:**



**INSIGHTS INTO ORGANIZATIONAL STRUCTURES,
GOVERNANCE MODELS AND STRATEGIC INITIATIVES**

NADO
NATIONAL ASSOCIATION OF DEVELOPMENT ORGANIZATIONS
FEBRUARY 2005

Organizational Leadership

- Know your strengths as Leader
 - > Utilize these strengths to improve the organization
- Recognize your shortcomings/weaknesses
 - > 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
 - > Benchmark and evaluate results related to your strategic action plan



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

Revenue Strategies



**Sell More
Existing Services
to Existing Clients**



**Sell Existing
Services to New
Clients**



**Sell New Products
to Existing Clients**



**Sell New Products
to New Clients**

Revenue Strategies

Amplify

- Offer your existing product lines and services to new customers and increase sales to existing customers

Diversify

- Add new products and services to offer your new and existing clients

Case Study #1



Risk Tolerance

You recognize the increase level of funding that will be available in the coming months resulting from the Bipartisan Infrastructure Law (BIL) and you see an opportunity to help attract some of these dollars to your community. In order to pursue this, you need to add professional staff members to your organization, but your Board of Directors is hesitant to hire new staff without a guaranteed revenue stream.

How do you advance this issue with your Board?

Case Study #2

Staffing

In the post-pandemic era it has become increasingly difficult to recruit, retain, and afford professional staff for your organization.

How do you address the current employment dynamics to ensure you have adequate and qualified staff to carry out the organization's programs and strategies?

How do you show staff appreciation?

Case Study #3

State Associations

Many state agencies are looking for assistance in delivering CARES, ARPA, and BIL funding.

How do you organize as a state association or enhance your state association to become a critical delivery vehicle for state agencies?

How are you using your State Association to support your RPC?

Case Study #4

Financial Management

The organization has been barely able to break even in recent years and has very little reserves in the bank and is deeply concerned about inflation and its impact on the financial performance of the organization.

How would you approach this issue and what strategic actions would you explore to shore up the organization's financial condition?

Case Study #5

Board Engagement

Having an informed and engaged Board of Directors is critical to organization success.

What strategies have you utilized to increase board member awareness and engagement?

Case Study #6

Telling Your Story

Telling your story, highlighting your successes and accomplishments is vital to creating awareness, loyalty and credibility.

What are you doing to tell your story?

Case Study #7

Innovation

Innovation is a key element to creating growth, producing value and financial diversification.

What innovative strategies have you pursued?

Case Study #8

Balance

Preventing burnout and fatigue should be a priority for RDO leadership.

How do you maintain a work/life balance for yourself and your staff?

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