

# ONBOARDING NEW ECONOMIC DEVELOPMENT DISTRICT EXECUTIVE DIRECTORS: *A TOOLKIT FOR YOUR FIRST 100 DAYS ON THE JOB*



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# ACKNOWLEDGMENTS

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## INTRODUCTION

Taking the reins of and leading an Economic Development District (EDD) requires a serious commitment of time and energy. It will likely require risks, innovation, compromise, leadership, partnership, and professionalism. The first 100 days is often the measure of how effective a new leader will be. It is the initial runway for you to establish your approach, show initiative, and demonstrate your ability to handle the responsibilities of the job. Those first 100 days are also the time to set the tone of the reputation and impact you desire to create for the organization.

Whether you are new to the organization, new to the region, or promoted from within, you should be intentional in your effort to grasp as complete of an understanding as possible. At times, the job may seem overwhelming, but remember that you are not the first to take this step nor will you be the last. There is a network of professionals to help and mentor you, as well as resources for certain aspects of the job to help guide you through.

Some of the most important things you can do to achieve success is to invest in and create trusting relationships with your collaborators and constituents, and constantly show excitement, enthusiasm, optimism, and passion for what you and the organization are doing. You will become the face of the organization. Therefore, be ever mindful of what face you are presenting.

This toolkit was developed to help new and aspiring executive directors equip themselves with the depth of knowledge and understanding that will be required to successfully lead an EDD. The content of this toolkit is a small representation of the strategies developed, lessons learned, best practices implemented, and failures overcome of the countless regional leaders who have over the past 50 years developed the network of EDDs across the country. It is these pioneering leaders that build a strong foundation for future success -- a success that continues with you.

### **What is an Economic Development District?**

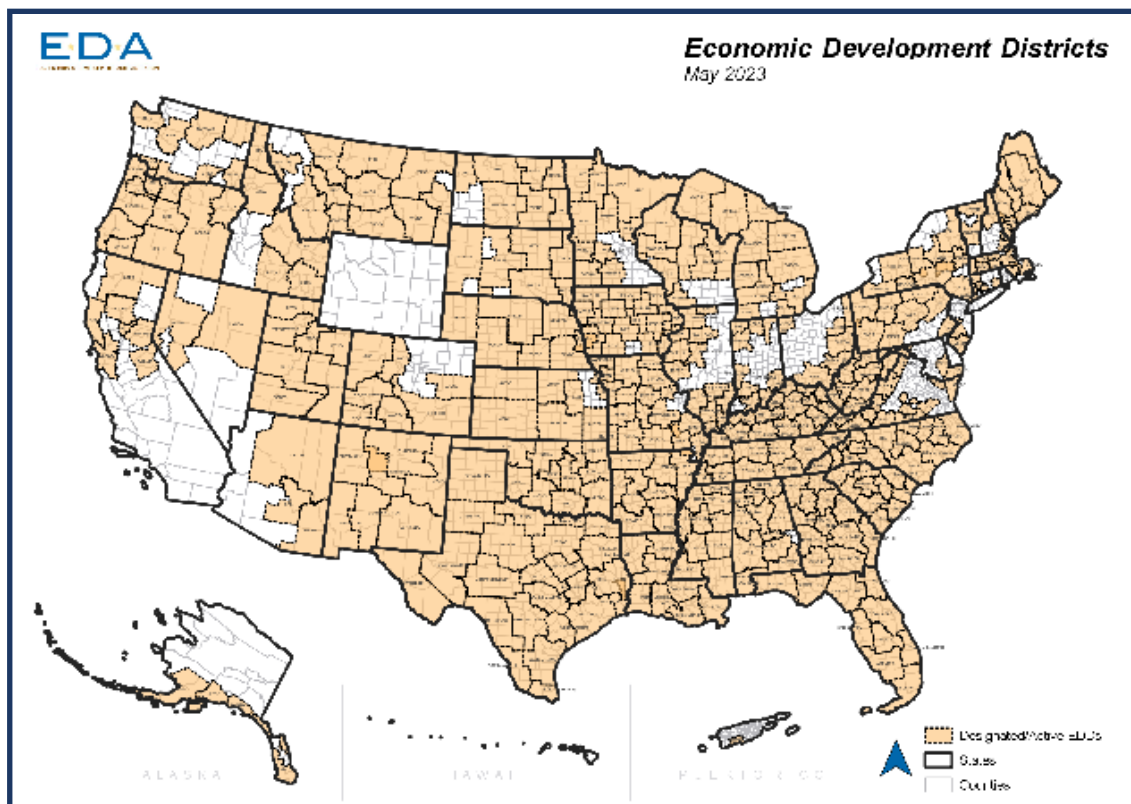
The U.S. Department of Commerce Economic Development Administration (EDA) defines Economic Development Districts (EDDs) as “multi-jurisdictional entities, commonly composed of multiple counties and in certain cases, even cross-state borders. They help lead the locally based, regionally driven economic development planning process that leverages the involvement of the public, private, and non-profit sectors to establish a strategic blueprint (i.e., an economic development road map) for regional collaboration”. EDA has designated 400 EDDs across the country. To request designation as an Economic Development Districts (EDD), an applicant must have an EDA-approved CEDS and

at least one geographical area within the designated service boundaries that meets EDA's regional distress criteria. EDA-designated and funded EDDs receive annual planning grant funds that are used to conduct a planning process within the EDD's region. For more information, visit [www.eda.gov](http://www.eda.gov).

EDDs are part of a larger network of Regional Development Organizations (RDOs) that collectively assist thousands of cities and counties with community development, economic development, workforce training, transportation planning, public infrastructure, affordable housing, disaster prevention, rural capacity-building, public health, regional planning, and the provision of other community services. Many RDOs help provide needed services and resources within underserved and rural communities. RDOs also administer a variety of federal, state, and local funds.

RDOs are also sometimes known as EDDs, Councils of Government (COGs), Planning and Development Districts (PDDs), Regional Planning Councils (RPCs), Area Development Districts (ADDs), Local Development Districts (LDDs), and Regional Planning and Development Commissions (RP&DC), and a host of other names. Just as EDA designates and funds EDDs that meet certain criteria, many RDOs also have federal designations given by other federal agencies, including designation by the U.S. Department of Transportation as Metropolitan Planning Organizations (MPOs) or as Regional/Rural Transportation Planning Organizations (RTPOs) that play important roles in regional transportation planning.

Although the work portfolio that an RDO conducts varies from one organization to another, in general all RDOs facilitate a variety of community services and initiatives designed to bolster economic competitiveness and quality of life.



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# LANDSCAPE FOR NEW LEADERSHIP

There are a number of factors that can make the transition as a new executive director challenging, rewarding, frustrating, or fulfilling. There may be positive things that have elevated the organization to its current level of prestige, or there may have been negative events that diminished the capacity of the organization and tarnished its image.

Regardless of those factors, you are following the previous leader of your economic development district and one day, someone else will follow you. Irrespective of the past and inherited reputation of the organization, you should strive to make your own positive imprint on the organization and your region.

Who you are following will determine the types of challenges before you. In this line of work there are always challenges -- the only variation being what that challenge may be.

If you are following a long withstanding and revered leader, you more than likely have big shoes to fill. If this is the case, the framework and team is probably already in place. You will just need to guide and direct with your own personal touch. The challenge will mostly be how to keep the machine working while imprinting your style.

If you are following a poor performer, the challenge is probably more centered around how to rebuild the team and trust, and develop systems that allow you to have a positive influence on the organization and region.

## BOARD OF DIRECTORS

Hopefully, you are inheriting a strong and engaged Board of Directors with the only challenge being to keep them engaged despite the change in leadership. Instilling confidence that the organization will continue to move forward under your supervision will be a key component of the beginning days of your tenure.

Contrarily, you may be inheriting a disengaged board who thought their jobs were completed once you were hired. The challenge will be to build a board-driven organization with support from board members who provide input, perspective, and feedback. Ask the board how they measure success, and then develop reporting systems to communicate success with them.

## COMMON CHALLENGES FOR NEW EXECUTIVE DIRECTORS

- Managing staff that were previously peers
- Working with board members that view you as a staff person
- Understanding organizational finances and recordkeeping
- Seeing the “big picture”
- Understanding the region and its players
- Understanding the organizational culture and shaping that culture to your style
- Grasping the breadth of programs and services
- Unfamiliar with staff and practices
- Desire/need to “hit the ground running”

## FINANCIAL CONDITION

You may have stepped into an organization that is in a strong financial position. As much as this is desired, there are still challenges that you will face such as continuing to build upon prior success, and using financial condition and position to wisely advance the region.

If you stepped into a financial mess, you likely have a daunting challenge ahead. However, it is wise to not pin issues on prior leadership, but to take the opportunity to slowly and steadily build a healthy financial base through performance and stewardship.

## KEYS FOR OVERCOMING PRIOR LEADERSHIP:

- Create a brand, reputation, and culture that aligns with your skills, values, passions, and strengths
- Listen, learn, and then take action
- Focus on the organization's mission, and you and your staff's strengths and skills

## STAFFING

The staff that you now direct is likely not your own and may not be who you would have hired. However, that does not mean they are not of great value. Ideally, they understand the region and organizational culture, and they possess much of the institutional knowledge that you need. If they have the right skills and are competent, you can certainly build on that.

You may have inherited staff that is lacking the skill set and simply going through the motions of the day to day. Before immediately letting staff go, try to work closely with them to assess their attributes and see where and how they fit into the future of the organization. They may need redirection and better management to uncover their talent and ability to contribute to the organization.

## ORGANIZATIONAL CULTURE

As a result of prior leadership, the organizational culture may be dynamic or it may be dysfunctional. If the culture is producing great results, try to embrace it and inject your influences if need be. If it is dysfunctional, assess why and then SLOWLY and deliberately shape it to your style.

- A common mistake that occurs with new leadership is trying to change too much too quickly.
- If the organization you are leading has been growing, your priority will need to be understanding how it has been growing and to nurture that growth.
- If the organization has been in decline, your priority will need to be understanding why it is in decline, and then develop strategies to stop and then reverse the decline.
- If morale, enthusiasm, and productivity is high, don't rock the boat. If it is low, work to find strategies to build up morale -- elevating enthusiasm, and ultimately improving productivity.
- If the organizational culture creates a positive environment that is producing meaningful results, keep going forward and merge your personality and style into the organization. If the culture is negative or toxic, make timely and deliberate actions after you have taken time to conduct a proper assessment.
- 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.

## **PRIORITY CONCERNS FOR NEW EXECUTIVE DIRECTORS: COMPARING YOUR CONCERNS TO YOUR PEERS' CONCERNS**

Recent conversations with new and aspiring executive directors identified their greatest concerns when assuming a leadership role, professional growth areas they felt they needed to work on, and key areas they felt could have a negative impact on the EDD's performance. As a new executive director, which concerns are top priorities for you to address?

- Capacity management
- Political environment and change
- Navigation of an organizational course correction
- Budget and audit awareness and understanding
- Prioritizing demands of the position
- Planning
- Managing human resources
- Communicating with multi-generational board members
- Assertiveness
- Managing finances
- Communication
- Confidence
- Dealing with interesting staff personalities
- Managing conflict
- Inspiring others
- Leading with a board of directors
- Board engagement and harmony
- Retaining professional and technical staff
- Attracting professional and technical staff
- Financial stability and sustainability
- Board member engagement
- Organizational bandwidth and capacity
- Constituency awareness
- Organization's credibility and reputation
- Political turmoil
- Risk tolerance
- Access to data and intelligence
- Leading with a board of directors
- Understanding RDO financing nuances
- Dealing with personnel
- Establishing a healthy organizational culture
- Understanding the breadth of programs and projects
- Dealing with external partners
- Understanding the organization's mission and purpose

# TAKING THE REINS OF THE ORGANIZATION

## INTERNAL HIRE/PROMOTION

If you are hired to lead the organization that you were previously part of as a staff or manager, then the transition to directorship has its own unique set of challenges.

Common challenges you will likely face in the new leadership role will be:

- Relating to former staff
- Getting the board to recognize and respect your new role
- Broadening your vision to see the big picture
- Shaping the organization's culture

Leading the staff that you were previously part of or were managing can be difficult. Make sure to respect your former colleagues and in return, they will respect you. Give every person the chance to prove their worth to you and then fairly evaluate their performance. Hold staff members accountable, but also work to help bring them to a position where they desire to be.

A common mistake when taking over is not looking past the performance you observed as the staff's peer. Don't assume their "when the boss was gone behavior" was a reflection of themselves and not a reflection of prior leadership. Be aware the staff may not have the same enthusiasm and confidence that the board has about your new role and that they observed your performance as a staff person. Be mindful of your need to build confidence with the staff based on performance and behavior.

It can also be challenging to get your board members and local governments to view you as the leader instead of just the former role you held at the organization. However, remember, nothing changes perspective faster than results and solid performance. Focus on getting the job done exceptionally well and others will start to see you in a different light.

As a former staff turned executive director it is important that you take care of details, but not at the expense of the organization's vision. You will need to delegate the details, follow through, and hold your staff accountable. If your focus is only on the details, it will be hard to lead and anticipate trends. You may be accustomed to completing the reports and mining the data, but as a leader you are called to do more.

## EXTERNAL HIRE

If hired from outside the organization and possibly outside the region, the challenges are just as difficult. You need to quickly learn about the region, its drivers, the players, and leaders. You need to identify your role in the region and adapt to the region's culture and values. You will need to grasp an understanding of the organization's programs and purpose. Hopefully this was accomplished in preparing for your interviews. Now that you are there, you should work to gain a deeper knowledge of each program, as well as each team member's role.



Seeking perspectives from those outside of your organization will be helpful in your quest for understanding. Talk to staff, board, local governments, and state and federal partners to get as much depth and breadth as you can on the region and organization.

You will need to promptly learn organizational practices and slowly adjust them if necessary. Professional attire, communication style, work hours, and flexibility are just a few examples of practices that may need your attention and adjustments. Applying your style to practices is important, but so is monitoring the rapidity of changes.

Examples of areas of changes made by new leadership without deep thought or consideration that impacted morale of staff:

- Changing office hours
- Changing dress code and professional attire requirements if going to a meeting
- No jeans days
- Flex time and remote work
- No closed doors policy
- Office cleaning responsibilities
- Thermostat controller
- Subbing responsibilities out instead of letting staff do it
- Failing to recognize some board members loyalty to particular staff

If new to the area and organization, you were likely brought in because you have much to offer. However, you should first learn, observe, and ponder. You don't want to capsiz because you turned things too quickly.

## LEADERSHIP PRIORITIES

Taking the reins can be an enormous task so make sure to stay focused on your priorities. Common priorities for new EDD executive directors include:

- Developing and maintaining organizational relationships
- Understanding financial management and nuances of EDDs
- Broadening the understanding of the organization's programs
- Leading staff
- Deepen your understanding of the organization's governance structure
- Understanding and leveraging technology
- Shaping the organization's culture
- Understanding the organization's constituents and contracts
- Getting to know the region, its people, its challenges, and opportunities
- Developing a professional support system for growth and accountability
- Communicating the organizations mission, value, and impact

# FINANCIAL MANAGEMENT

A new executive director will need to spend considerable time understanding the organization's financial condition, practices, performance, and policies. The initial focus areas for new leadership should be on:

- Staff
  - » Who on the team is responsible for what?
  - » Are there checks and balances in place and shared responsibilities to ensure proper stewardship of the organization's finances?
- Financial Management Policies
  - » Do you have written policies or financial procedures? If not, this is a key item to address.
  - » Are safeguards in place?
  - » Are you ensuring proper financial stewardship?
- Financial Management Software
  - » Is the software sufficient for the task?
  - » Is it reasonably priced for the organization's needs?
  - » Does the software adequately protect confidential data?
- Budgeting
  - » Review current budget and financial performance.
  - » Understand fiscal period(s) of the organization.
  - » Understand budget categories, such as, fixed costs, indirect costs, operating costs, debt service, etc.
- Auditors and Audits
  - » Who does the organization's audit? Are they qualified and properly licensed?
  - » When was the last audit performed?
  - » When is the next audit report due, and is it scheduled?
  - » Read the audit report and understand the auditors' findings and recommendations.
- Indirect Cost Plan
  - » Does the organization have an approved indirect cost plan? If so, review and make sure your managers also understand the plan and impact on budgets.
  - » If not, do you need one?
- Financial Reporting
  - » Understand what needs to be reported to who, and when
  - » What is the preferred format for financial reporting by the funding organization?
  - » When do you need to provide financial reports?
  - » Who receives, or needs to receive reports?
- Revenue Sources
  - » Identify primary revenue sources. Are they annual or perpetual sources?
  - » If membership fees or tax-based, understand how the amounts are calculated.

- Key Expenses
  - » Identify and understand major expense categories.
  - » Economic Development Districts are professional service organizations, and as such, staffing expenses will often represent a majority of the budget.
- Insurance Policies
  - » Review the current insurance coverages to make sure adequate coverage is in place. If necessary, seek outside counsel to review your coverages.
  - » Key insurance areas are:
    - ◊ Liability insurance
    - ◊ Workers compensation insurance
    - ◊ Officer and Directors fidelity insurance, errors and omissions, or professional liability coverage
    - ◊ Property and casualty insurance
    - ◊ Cyber security insurance

## FINANCIAL MANAGEMENT BEST PRACTICES

The following recommendations are essential to creating a strong financial management approach:

- 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

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*Financial management software does not replace your leadership responsibility to manage the financial resources or to understand the financial performance and reporting of the organization.*

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## COMMUNICATING FINANCIAL PERFORMANCE WITH THE BOARD OF DIRECTORS

When sharing financial information with your Board of Directors the following principles are best practices from successful organizations:

- 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 ways
- Be consistent with financial reporting using 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
- Remember 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

The most common best practices for sound financial management of the organization are:

- Have a financial management procedures manual that clearly states your responsibilities and those of the staff assigned to manage 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 you are not fully confident in your financial aptitude
- Have an audit done every year by an independent accounting firm
- Meet with the auditor to get their 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 history of the organization in order to lead the organization

Creating revenue to support your regional organization is an element that likely consumes an inordinate amount of your time and attention.

EDDs often approach their organizational revenue from an "entitlement" perspective -- relying on historic revenue sources (which unfortunately are diminishing or at best not keeping pace with costs) including:

- Same level of membership dues or taxes from the communities in the region
- Funding from the state legislature
- Funding from EDA
- Funding from state planning and development agencies

Struggling organizations should rethink their revenue strategy and approach this with a bit more entrepreneurial thought about services and revenue. Five common strategies for increasing revenues are:

1. Engage your existing constituents to provide more services of your existing portfolio of services
2. Engage new entities for your existing portfolio of services
3. Develop new services to offer to your existing constituents
4. Market newly developed services to prospective new entities
5. Increase the value of services provided through hard work and successful demonstration of your abilities

Executive directors new to financial management or need a refresher on the basics of financial management for your organization, below are a few things that can help with your organizational management. Begin by separating the issues. There are things that you need to know and understand as the director and there are things that your board members need to know and understand.

### What the Executive Director Needs to Know and Understand:

- A statement of cash flow is used differently than an income statement or operating statement. You need to know and understand both and use them for their intended purposes.
- A budget is a planning tool -- a blueprint for your future. The budget will change as your plans change and it is okay to make adjustments to your budget.
- When developing your budget, conservatively estimate your revenue and aggressively estimate your expenses to help end the year in the black versus the red.
- Financial statements are historical and report only what happened in the past. They can show trends for the future and can help project your financial future, but don't just study history. Look ahead to see where you are going and target where you want to be.

### What the Board of Directors Needs to Know and Understand:

- The organization's financial condition, financial position, and financial performance.
- The source of the organization's funds so they know what they can be used for. There are some unique and seemingly complicated restrictions on how you can use your funds. You will need to communicate this to your board.
  - » There are unrestricted funds that can be used for any purpose.
  - » There are temporarily restricted funds, which are common with grants, that have to be used for the grant purpose for the grant period.
  - » There are permanently restricted funds that can ONLY and FOREVER be used for their original purpose such as the Revolving Loan Funds.

## FINANCIAL STATEMENTS

As the executive director, you need to know and understand your financial position and condition while being able to communicate the information fluently and effectively with your board members.

- A balance sheet is a financial STATUS report that shows the organization's financial position at a set point in time. This report is usually generated on the last day of an accounting period.
- An operating or income statement is a financial PERFORMANCE report. It shows the organization's financial performance for the reporting period.
- A statement of cash flows explains the reason there was a change in the cash position during the reporting period. It shows the sources of cash inflows and it shows the uses of cash outflows. This report will enable you to anticipate your need for cash. This becomes very helpful as you approach payroll day.

### QUESTIONS TO PONDER

- What information do you review to understand the financial condition and performance?
- How are you ensuring checks and balances, and financial integrity?
- In what areas of financial management might you need additional training or coaching?
- How knowledgeable is your board of directors about the organizations' financial condition and performance?
- How can you increase the level of understanding by your Board of Directors?
- In what areas is your financial performance most vulnerable, decreasing revenues, increasing costs, etc?
- What specific strategies are you pursuing to shore up any vulnerabilities?

# OPERATIONAL ISSUES

## PROGRAMS

As the executive director, you need to inventory and understand what programs the organization is operating and delivering. Specifically, you should know the following:

- What is the program objective?
- What is the budget to operate or deliver this program?
- Who are the key staff involved in delivering this program?
- What are the contract terms and conditions?
- What is the current status of the program or project?

## STAFFING

As a professional service organization your greatest expense is staffing which can either be an asset or a liability. As the executive director, you need to develop a deep understanding of your staff, their capacity, and their performance.

Key elements that an executive director should know about the staff include:

- What are their job duties and responsibilities?
- What key projects or programs are they responsible for?
- Who is their immediate supervisor?
- What is their tenure with the organization?
- What is their prior work experience?
- What degrees or certifications have they been awarded?
- What are their career goals and passions?
- What are their annual performance goals? Does it require reviewing prior performance evaluations to ascertain goals and accomplishments?

## ORGANIZATIONAL SCAN

To facilitate a new executive director's desire to "hit the ground running," there are a few elements of the organization that should be obtained, studied, and understood:

- Organizational Chart
  - » Staff
  - » Managers
- Organization Culture
  - » Is it working and suitable for professional growth of staff?
  - » Is it an asset or impediment to talent attraction?
- Organization History
  - » Successes
  - » Failures
  - » Challenges
  - » Impacts
- Organization Strategic Plan
  - » Does it exist?
  - » When was it developed? Updated last?
  - » Is it actionable?
  - » Is it understood?
  - » Does it require responsibility and accountability?
- Organization Basics
  - » Workdays/hours
  - » Remote work
  - » Keeper of the keys
  - » Supply closet, copier, bathrooms, etc.
- Customers/Clients/Constituency
  - » What work is the organization doing?
  - » What entities are you providing service to?
  - » Who else is serving the needs of these entities?
- Contracts
  - » What contracts does the organization have for services?
  - » What are the terms of the contracts?
  - » What is the status of the work being completed?

## BEST PRACTICES FOR LEADING WITH A BOARD OF DIRECTORS INCLUDE:

- Having regularly scheduled meetings that encourage participation.
- Having a structured meeting format to make the most use of time and provide value to the members.
- Having an agenda and sticking to it. Stay within the time constraints set up for the meeting.
- Utilizing committees as appropriate to streamline the policy debate, make recommendations, and broaden board member engagement.
- Creating ownership by the board as appropriate with your enabling legislation. Constantly reinforcing their ownership versus ownership by the executive director.
- Asking them for their opinions.
- Allowing them to take ownership in ideas.
- Providing value to them through information and project results.
- Filtering and interpreting data to provide meaningful information.
- Providing constant board education.
- Immediately educating and including newly elected officials and appointed board members.

## GOVERNANCE

*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.*

The Board of Directors can be a tremendous asset to the organization. As the executive director, you need to understand your governance structure and board preferences to maximize their value to the organization. At a minimum, it is paramount that you:

- Know who your board members are, how they are appointed, and how they are elected
- Review prior board meeting minutes to get an idea of board engagement and responsibilities
- Review existing board meeting packets and make adjustments that will be beneficial to your management style
- Understand preferred the meeting format: date, time, length, agenda, etc.

Tap into available resources for running effective board meetings and how to manage a board of directors. As you meet with board members to orient them on their roles and responsibilities, follow the parameters outlined below. These are best delivered to board members by the Board Chair.

### **Board of Directors should focus on:**

- Setting policy and developing priorities
- Providing general guidance and counsel to the director
- Ensuring financial integrity of the organization by educating themselves to be able to understand finances, asking questions, and completing due diligence
- Nurturing a vision for the organization especially when orienting new board members and when times get tough
- Overseeing the executive director by conducting an evaluation of the director's performance
- Responsibly, ethically, and knowledgeably participating in the leadership of the organization

### **Executive Director should focus on:**

- Functioning as the CEO
- Recommending and carrying out board policies
- Managing day-to-day operations
- Maintaining organizational relationships
- Overseeing the staff
- Communicating with the board
- Reporting performance and impact

### **Out of Bounds:**

- Board Members should not involve themselves in operational matters or personnel issues



- Directors should not engage in politics

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

#### **Dos**

- Learn all you can about your members (i.e. 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 telling all board members the same thing and avoiding gossip
- To show reverence and respect, address board members by their title and last name
- 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
- Do not pretend to have all the answers
- Be concise and informative by not giving lengthy or technical responses to questions
- Do not be defensive —accept constructive criticism
- Do not only talk to your members about activities—reinforce the mission, purpose and strategic objectives that the organization is pursuing

## **INFORMATION TECHNOLOGY**

Information technology (IT) has become an integral part of organizational management, and as the Director it is important to know key elements about IT in the organization.

- Who is responsible for managing IT (servers, computers, data, etc)?
  - » Staff or contractor? Are they adequately trained/qualified?
  - » Is work insured?
- Are you operating in a server-based environment, cloud-based environment, or do you not have a networked system?
- Is your software and data properly secured?
- Who has knowledge of firewall, protocols, license agreements, etc.?
- Who assigns email addresses?

- What technology does the organization utilize?
  - » GIS, Teams, Microsoft, Mac, Google, other
- What is the condition and age of computers and other devices?
- What are the policies regarding cellphone use?
  - » Are they company provided or the staff's responsibility?
  - » Public records?

Are there procedures or training for all staff on email use, spam, malware, phishing, etc.?

# COMMUNITY & REGION

## REGIONAL SCAN

It is paramount the executive director understands the dynamics, efforts, organizations, challenges, and opportunities in the region.

- Know the communities in your region
  - » Who are the key leaders?
  - » What are their needs?
  - » What is their current level of engagement with the organization?
  - » What has been their interaction with the organization?
  - » What do they want from the organization?
- Identify your constituents--What constituencies do you serve?
  - » Elderly
  - » Transit
  - » Housing
  - » Disadvantaged
- Who are existing or potential collaborators?
  - » Non-profit organizations
  - » Educational institutions
  - » Community organizations aligned on key initiatives—tourism, entrepreneurship, housing, transportation, elderly, disadvantaged, etc.
  - » Local/regional economic development organizations
- Who are existing or potential competitors?
  - » Overlapping organizations (i.e. housing authorities, transit providers, employment offices, social services, etc.)
  - » Consultants
  - » County/municipal staff
- Know your region
  - » Cities/counties
  - » Population and trends

- » Basic demographics (income, age, housing, education)
- » Economic drivers and outputs
- » Key challenges
- » Historical and likely disruptions
- » Transportation systems
- » Infrastructure components and capacity

## QUESTIONS TO PONDER

- How are you addressing 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?
- What strategies can be deployed to motivate, inspire, and instill confidence with staff?
- What strategies have you utilized to increase board member awareness and engagement?
- What was your biggest intimidation working with your board?
- What has been your biggest challenge, and how are you addressing it?
- What value does your board provide to you? To your organization? And how can you enhance the value?
- How do approach your board members to add new staff and capacity to address emerging issues or to embrace limited risks?
- How do you prioritize uninterrupted time to do "deep thinking?"
- How do you allocate time to spend with your leadership team and staff?
- What information do you review to understand the financial condition and performance?
- How are you ensuring checks and balances and financial integrity?
- What areas of financial management might you need additional training or coaching?
- How knowledgeable is your board of directors about the organizations' financial condition and performance?
- How can you increase the level of understanding by your board of directors?
- In what areas is your financial performance most vulnerable, decreasing revenues, increasing costs, etc.?
- What specific strategies are you pursuing to shore up any vulnerabilities?

# INTENTIONALITY (GETTING STARTED)

## RELATIONSHIPS

A priority for new leadership is to inventory the essential relationships of the organization. The level of trust relationships that you foster on behalf of the organization will have a large impact on the success you will have as a leader and as an organization.

The priority internal relationships should include your managers, staff, and board members.

The priority external relationships include the state and federal legislators that represent your region, the elected officials that lead the state and communities within your region, the staff that works within your communities, the state and federal agencies that support and likely fund your organization, and members of the media.

New leadership should devote a significant amount of time building, maintaining, and if necessary, repairing relationships internally and externally. The guide below is an example of an approach that can be used to identify the priority relationships and begin your efforts in developing trust relationships.

## MESSAGING

The way you communicate will have a strong influence on the way you and your organization are perceived. As a new executive director you need to develop your message, share your story, and provide insights that will engage, inspire, motivate, and lead your region and organization.

Here are some leading thoughts to help you craft your message:

- Develop the core message
  - » Be consistent, concise, and a champion
  - » Share with board, public, staff, and funders
- Introduce yourself
  - » Who you are?
  - » Why you are excited about the position?
- Introduce the organization
  - » What does the organization do?
  - » What is the organization known for?
  - » What impacts is the organization making?
- Cast a vision
  - » What do you want to accomplish?
  - » How will you measure success?

The planning chart for relationship contacts for the first 100 days in office is a guide to help new directors inventory and prioritize key relationships and contacts for the organization. The chart is designed to encourage the director to allocate time on a priority basis to invest in key relationships. The user should begin by inventorying all the necessary contacts and then assigning them priority in the appropriate decile of the graph (Who). The director should develop an understanding of their relationship with the organization (role) in advance of the meeting. Following the meeting the director should update the perceived role and relationship with their findings. Following the interaction the director should articulate that the relations needs (outcomes) from the director and the organization and task any action items. The new director should continue this approach until all key relationships have been contacted.

<b>FIRST 100 DAYS APPROACH PRIORITY RELATIONSHIPS</b>			
<b>PERIOD</b>	<b>WHO TO CONTACT</b>	<b>ROLE OR RELATIONSHIP WITH ORGANIZATION</b>	<b>MEETING OUTCOMES (WHAT THEY CAN DO TO SUPPORT YOU &amp; WHAT THEY NEED/EXPECT FROM YOU)</b>
Days 1-10			
Days 10-20			
Days 20-30			
Days 30-40			
Days 40-50			
Days 50-60			
Days 60-70			
Days 70-80			
Days 80-90			
Days 90-100			
Future			

## INTENTIONAL IMPROVEMENT

As a new executive director your time will be in high demand and it is imperative that you prioritize your own professional development, your own work-life balance, and your principal responsibilities.

The table below can be a guide to help you articulate your priorities for the immediate, intermediate, and long-term.

<b>IN THE NEXT 30 DAYS I WILL:</b>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE MY ABILITY AS A LEADER</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE HOW MY ORGANIZATION PERFORMS</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO ENCOURAGE AND ENABLE STAFF/TEAM MEMBERS</i>
<b>IN THE NEXT 90 DAYS I WILL:</b>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE MY ABILITY AS A LEADER</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE HOW MY ORGANIZATION PERFORMS</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO ENCOURAGE AND ENABLE STAFF/TEAM MEMBERS</i>
<b>IN THE COMING YEAR I WILL:</b>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE MY ABILITY AS A LEADER</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO IMPROVE HOW MY ORGANIZATION PERFORMS</i>	<i>(INSERT YOUR SPECIFIC PLAN)</i>  <i>TO ENCOURAGE AND ENABLE STAFF/TEAM MEMBERS</i>

## PRIORITIZING YOUR EFFORTS

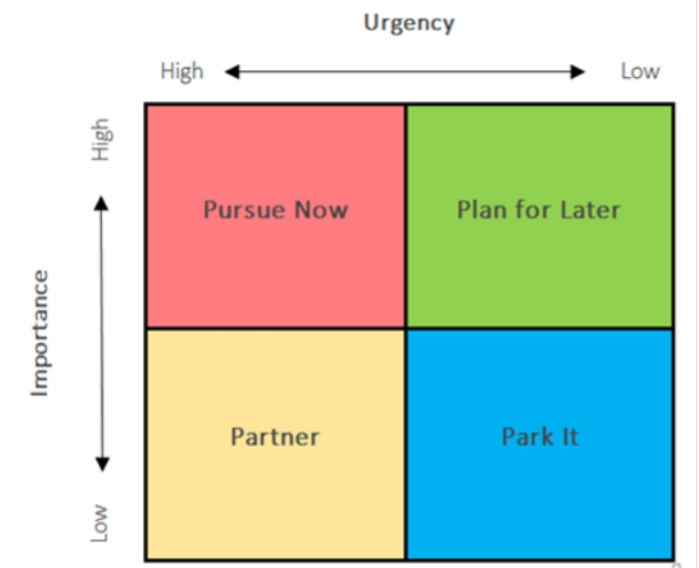
The demands on your time will be enormous as you embark on this leadership journey. The Eisenhower Matrix is a tool that can help focus your efforts on the things that are urgent and important for you to address.

Tasks are placed in the quadrant based on how urgent and how important they are. If things are highly urgent (must be done right now, of high importance. Only you can do), then these tasks are placed in the upper left hand quadrant and should be pursued. These tasks are the items that should get your attention.

All other items are less urgent and can be delayed. Items that are less important (or not important that you complete them) can be delegated to other partners.

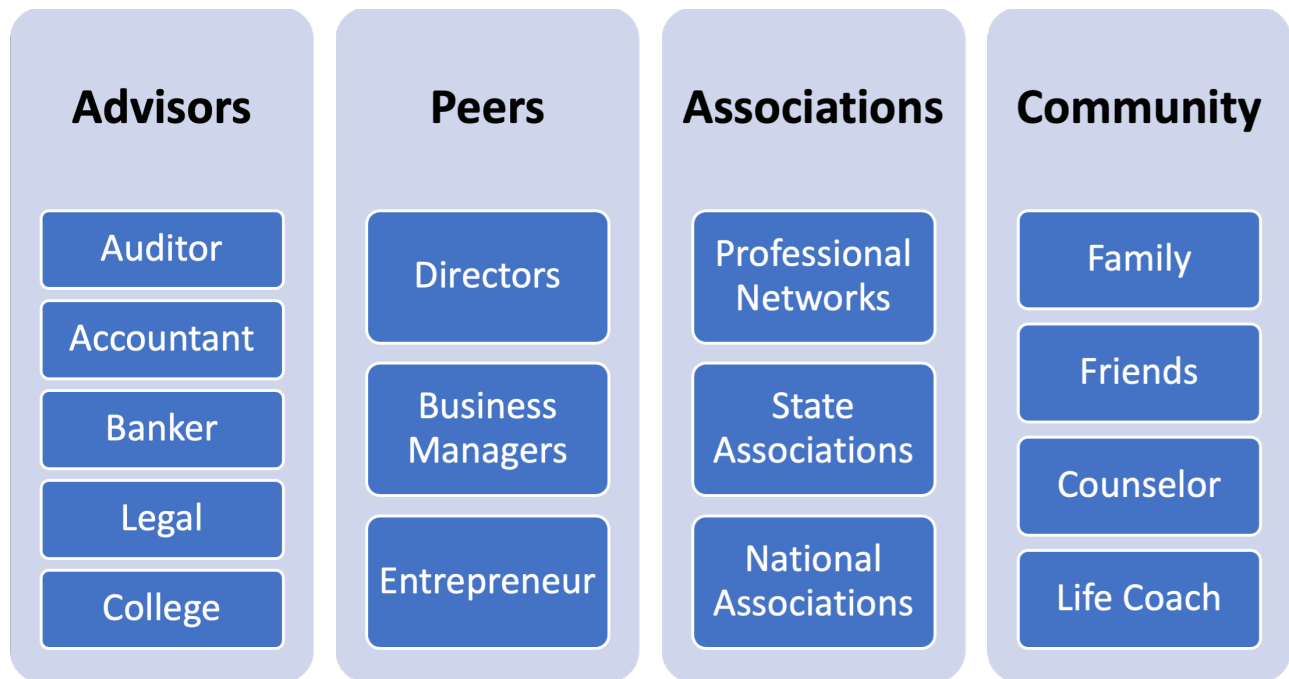
Items that are not urgent or important can be parked until you have time to address them, or they become urgent or important.

Unfortunately, those items that are not important or urgent can often still consume too much time and attention.



## SUPPORT SYSTEMS

As a new executive director, you should identify entities to help you succeed such as people you can rely on for honest and beneficial advice.



## PREPARING FOR THE UNKNOWN

The only constant in the business of regional development is change. Some changes you can anticipate and prepare for, and others you cannot. So, how do you anticipate and prepare for the unexpected changes?

Here are a few suggestions for preparing for the expected and unexpected:

- Have a long-term financial plan for the organization
- Create a reserve fund and be disciplined to maintain and replenish it
- Keep your overall mission and purpose at the forefront, especially with the board
- Develop a strategic action plan for yearly focus, as well as an overall organizational plan that provides a long-term perspective
- Be nimble so that you can adjust as conditions change (nimbleness is restricted if carrying debt)
- Be flexible by doing things differently and more efficiently, or be prepared to ramp up quickly
- Be entrepreneurial

## QUESTIONS TO PONDER

- How did you prepare for an RDO leadership position?
- What are you doing to grow professionally? Are you prioritizing professional development?
- Who do you turn to for guidance, accountability, and innovation?
- What are you doing to tell your story?
- What innovative strategies have you pursued?
- Are you balancing the demands on your time to recharge and protect your mental wellness?
- What is the top priority for the organization?
- What is the first thing you want to accomplish?
- What do you want your and the organization's reputation to be? Whose perception is important?

## FINAL THOUGHTS

- Don't rush to make changes
  - » Make changes after you have a full understanding of the issue, have thought through the various alternatives, and are confident you are making the most impactful change possible.
- Don't concede to always do things like they have always been done
  - » You are a talented professional and were hired because of your abilities. Use your abilities and this opportunity to make meaningful change.
- Continually develop your skills and the organization's capacity
  - » If there is an area that you lack confidence or abilities in, seek training, find a mentor to guide you, look internally for staff that has this ability, or hire strategically to offset your shortcomings.
- Always be growing and learning
  - » Now that you have the job, don't stop seeking to grow professionally. Constantly work to grow your abilities and knowledge so that you can magnify the impact you're making on your organization and region. There are very good professional development opportunities available so make learning a priority for you and your staff.