Best Practices for County Officials in North Carolina

Best Practices in Public Information and Media Relations
Best Practices in Board Leadership and Development
Best Practices in Continuing Education

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I. Public Information in Mass Media: Television

Henrico County, Va.

The county has developed an entire department dedicated to the production of a county television station, HCTV 17. All of Henrico County's public information is handled through the department, titled the **Public Relations and Media Services Department**. The department is in charge of all media and press releases, publications and graphic arts. Unique to the county is the media services branch, which is essentially a TV station with six full-time producers. The station has been airing original programming since 2003.

Like many other county television stations, HCTV 17 spotlights important county events and programs that may be of interest to citizens. It does not broadcast any public meetings, instead taking a more mainstream approach to county TV. In programs like "Badge of Protection: The Henrico Sheriff's Office," a specific county agency is spotlighted to help citizens understand the work of these agencies and their available services. Other programs provide updates on major county projects, documentaries on county history, or information on fitness, health and emergency preparedness. Henrico County is unique because the types and formats of its programs have the look and feel of a mainstream TV station.

Tamra McKinney, director of public relations and media services, gave a prime example of the benefits of HCTV. The station ran a program called "Cold Case," attempting to play off network hit crime dramas such as CSI by tying story lines back to the community. As a result, the Sheriff's Office received eight viable leads in cold cases up to 22 years old – proving that county government programming can be both intriguing and informative, and at the same time promote citizen involvement.

For more information, visit www.co.henrico.va.us/pr/index.html
Contact: Tamra McKinney at mck10@co.henrico.va.us

Mecklenburg County, N.C.

One word can unfortunately describe many county government TV channels: boring. It is difficult to creatively get the word out about county government services and events. Mecklenburg County decided that county TV needed to be more like mainstream TV and gave birth to the show **The Mecklenburgers**, a weekly episodic TV show about county government, performed by actors in a funny and entertaining way. It is essentially a "show within a show" about a TV station that tries to produce a weekly family sitcom. The shows focus around county and community issues, such as substance abuse and disease, or county services, such as parks and recreation. Local celebrity radio DJs, sports stars and TV anchors make cameo appearances.

The show is made possible through a partnership between Mecklenburg County and public broadcasting station WTVI. The station is funded through government grants, but the county wanted to turn its partnership with the station into a services contract, rather than provide operational money. The same amount of money would be given to WTVI, but on the condition that it would help the county produce "The Mecklenburgers." The show not only reaches cable subscribers, but TV viewers in 13 surrounding counties.

The county's role is to hire, promote and advertise the show through its Public Information Office. In addition, one of the county's assistant managers writes the scripts for the show.

"The Mecklenburgers" airs each Sunday at 7:30 p.m. In its first two years, 17 episodes of the show have aired, drawing an average of between 10,000 and 20,000 viewers. The show has received seven national "Telly" awards, and in 2005 and 2006 received achievement awards from the National Association of Counties.

For more information, visit www.themecklenburgers.org
Contact: Danny Diehl at diehldc@co.mecklenburg.nc.us

Yuma County, Ariz.

As one of the smallest counties in Arizona, Yuma County wanted its TV spots to get noticed, but wanted to stay different from the state's bigger counties. The county public information officer asked officials at Adelphia, the local cable operator, for help. Because Adelphia is mandated to run a certain number of Public Service Announcements (PSAs) each week, the PIO requested that the cable provider air county-produced PSAs for Yuma. The PSAs, called "**County Update**," were short and funny, focusing on topics such as recycling and health issues, and ran on almost every channel. Currently, 300 to 400 spots are run a week. The county pays between $25 and $50 to produce each PSA.

Yuma later realized that the PSAs were failing to reach at least 50 percent of its residents. This group – mostly Hispanic – prefers its messages in Spanish, and the PSAs were only aired on channels with English programming. The PIO reached an agreement with Adelphia to cover some of their PSAs on the Spanish channels, such as Telemundo or Univision. Both English and Spanish PSAs are produced at the same time using different narrators. The PSAs are dubbed **CAPSULA** and are now broadcast as far south as Mexicali, Mexico. The PSAs are also available for viewing on the Yuma County Web site.

As a best practice idea, PSAs seem simple enough, however Yuma County's PIO warns that it is difficult to contract with a major cable operator. The agreement in Yuma works on a handshake deal, while agreements with larger cable companies require much more negotiation, and compensation may be necessary.

For further information, visit www.co.yuma.az.us
Contact: Kevin Tunell at kevin.tunell@co.yuma.az.us

II. Public Information in Mass Media: Internet

Knox County, Tenn.

Webstreaming has emerged as the premiere technology for broadcasting meetings and events via the Web. Knox County decided to do two things: 1) go beyond just broadcasting county meetings; and 2) find new methods to reach the younger generation of Internet-savvy citizens.

The county created a weekly radio show hosted by County Mayor Mike Ragsdale that features a one- to two-minute update on major issues facing county government and upcoming events in the area. Updates on the budget are also a common topic.

To take it one step further, the county decided to make the weekly address part of a Podcast. **Podcasts** are radio shows automatically delivered over the Internet to computer users with Internet access. Citizens do not need an iPod to listen, as the Podcast link is available at all times over the Internet. The county update is also available on Apple's popular Web site, iTunes. All downloads and instructions are available on the county Web site.

As a best practice, Podcasts and Webstreaming radio shows will only work if the person delivering the announcement is concise, charismatic and interesting. The best technology cannot substitute for a good speaker who can keep listeners engaged.

For more information, visit www.knoxcounty.org/countymayor/podcast.php
Contact: Jon Gustin at jon.gustin@knoxcounty.org

Henderson County, N.C.

Henderson County may not have the resources of a larger North Carolina county, but it clearly knows that the main driver of information is the Internet. The county makes best use of delivering information via the Internet with its e-newsletter **"Henderson Highlights**."

Henderson County's public information officer contacts each department head monthly and requests submissions on noteworthy issues or events. For headliner articles, the PIO includes pictures.

Henderson Highlights can be accessed through an online subscription form on the county's Web site home page. Included in the form is a survey about the effectiveness of HCTV-11, the county's TV station. Henderson is able to subscribe citizens to the newsletter and, at the same time, survey subscribers about another media outlet. Feedback on the newsletter has been positive. There are well over 500 subscribers, and the newsletter adds around 15 new subscribers each month.

For more information, visit www.hendersoncountync.org
Contact: Chris Coulson at ccoulson@hendersoncountync.org

Onslow County, N.C.

Rural counties often find it difficult to reach constituents through print media or technology. Onslow County decided to use the Internet to make it easier for citizens to experience county government. The **Videos Live and On Demand** program was created through a contract with Granicus, Inc. – a software consulting company providing public access services to local governments.

Granicus provided three services to Onslow County. First, it set up software to allow online streaming audio and video broadcasts of board meetings. The videos can be viewed in real-time online or saved in an online archive accessible on the county Web site. Secondly, Granicus installed a "minutes maker" program. The county clerk can record motions, votes, attendance and speaker notes with a minimal amount of annotation work. It's all easily reviewed the next day or at a time when the clerk is ready to publish to the public Web site. Finally, Onslow requested Granicus' VotingSystem feature, which automatically records commissioners' votes through touch-screen panels (or other input device). The VotingSystem works together with the MinutesMaker module to automatically capture legislative motions, votes and attendance information.

The system was advertised on the county TV channel and via several press releases prior to its debut. Since then, it has received nothing but positive feedback. Since the Onslow County public information TV channel is run by Time Warner, only a portion of the county citizens receive it. With "Videos Live and On Demand," citizens without cable access but with Internet access can watch board meetings at their leisure.

Granicus provided all software and employee training to run the program. The main stumbling block to implementing this best practice is obvious: funding. However, Assistant County Manager Lori Brill described the cost as reasonable (around $50,000), and noted that the board's commitment to reaching the public was key to the success of the program.

For more information, visit www.co.onslow.nc.us/main/granicus/granicus.htm
Contact: Lori Brill at Lori_Brill@co.onslow.nc.us

III. Public Information in Mass Media: Reaching N.C. Children

Catawba County, N.C.

Kids are not likely to have a great interest in county government but quite often, through reports and school projects, they learn about the many and interesting services counties provide. After surveying parents and students about their information needs, Catawba County created **CATCO for Kids**, a Web site designed to help youths with research on county government. It also links them to community Web sites, such as the library and the local 4-H branch. The links include county history, economy, geography and the county flag.

The purpose of the Web site is to provide youths with easy access to county data and to stimulate involvement in county government. The Web site lists links for parents, including for the Catawba County Partnership for Children, social services at all levels of government, and public school systems and colleges.

At the time this report was written, the Web site was in its infancy stages, and the county was in the process of asking for more feedback from children and parents on what they would like to see on CATCO for Kids.

For more information, visit www.catawbacountync.gov/misc/dirofsvc/kids/catcoforkids.htm

Howard County, Md.

Howard County created **Kids County**, an interactive Web site for children and their parents, to reach out to youths. Users are asked a series of questions – such as "Do you know who paints the lines on roads or who plows the roads when it snows?" – to help explain to children and parents what services counties provide.

The site uses fun characters, illustrations and activities to peak youths' interest. Some examples: "Zooma," a picture selection game, allows kids to guess what is in a close-up picture, and then explains how it is used in county services. "Hands-on" provides printable word searches, crossword puzzles and coloring pages related to county government.

For more information, visit www.co.ho.md.us/DOA/DOA_PIO_KIDS_HOME.htm
Contact: Victoria Goodman at vgoodman@co.ho.md.us

IV. Public Information Events and Programs

Brevard County, Fla.

In response to the need for a more involved community, Brevard County decided that its citizens needed to go back to school and created **The Citizens Academy**. Produced through the County Manager's Office, the free Academy is offered twice a year in the spring and the fall. Classes are limited to 20 people per class and are run in eight sets of weekly sessions. Classes are offered in the morning and in the evening to accommodate working professionals.

The Citizens Academy varies its themes each week. In the first class, the county manager usually gives an overview of county government structure. The remaining courses address themes such as county history, volunteer opportunities, emergency services and budgeting. The Academy also offers half-day tours of the wastewater treatment plant, jail and other county facilities depending on attendee requests.

The goal of the program is to inform the community about county government and encourage citizens to volunteer for boards, committees and service projects. The response from the community has been favorable: each class is full, and new sets of courses fill up quickly. The Academy is advertised on the county TV station, library, community newspaper and – most importantly – by word of mouth.

For more information, visit countygovt.brevard.fl.us/citizens-academy
Contact: Carrie Cotter at carrie.cotter@brevardcounty.us

Macomb County, Mich.

Senior citizens are often the most involved citizen group in local elections and volunteer activities. That segment of the population, however, hasn't taken to the World Wide Web and newer forms of technology for access to important county services. In some cases, they are not even aware that the services exist. Macomb County decided to combat this problem by creating two events, the **Older Americans Festival**, and **Senior Outreach Day**.

The Older Americans Festival is a one-day event held in a public park by the county Board of Commissioners, usually in June that features dancing, games and food vendors for senior citizens to enjoy. Free health screenings, and information on county services such as the public health, animal control, emergency medical services and senior programs is on display in booths. Annual attendance at the festival has averaged between 2,500 and 4,000.

Senior Outreach Day is a mobile event that occurs in several Michigan cities throughout the year. Sponsored by the Board of Commissioners, it offers free health screenings and immunizations, and provides seniors with information on the County Health Department.

Macomb County also recognized an untapped and uninformed resource in its high school population. To get the students more involved, the school board and the Board of Commissioners partnered with the Close-Up Foundation to create the **Up-Close Student Government Day.** The event is held downtown at the county administration building, and activities include job shadowing, a tour of the jail, and a mock board meeting.

Students apply through their schools, and each school is allowed to send four or five students. In 2006, the program hit capacity, with about 100 students attending. The event has been highly publicized in both schools and newspapers, further promoting the mission of county government outreach.

For more information, visit macombcountymi.gov/publicaffairs/index.asp
Contact: Phil Frame at phil.frame@macombcountymi.gov

Durham County, N.C.

Who does what in government? Which services are offered by cities and which are provided by counties? Durham County set out to clear up any confusion on the subject with a program called **Neighborhood College**. The 10-week series of classes provide information on key city and county services, giving participants a chance to meet and interact with city and county staff.

Topics include city and county services, community development and the budget process. The majority of presenters are department heads and subject-matter specialists from both governments. Time is set aside at the end for a question-and-answer session. Durham runs both spring and fall sessions. To date, the program has been highly successful and is even getting inquires from counties in other states who wish to model their own program after Durham's.

For more information, visit
www.co.durham.nc.us/departments/bocc/Durham_Neighborhood_College/index.cfm
Contact: Deborah Craig-Ray at public_information@durhamcountync.gov

Pinellas County, Fla.

The motto of Pinellas County could be, "If the people don't come to you, you go to the people." In an effort to reach out and inform citizens about county government, the Pinellas County Board of Commissioners came up with **"Government on the Go."** Measuring 25 feet in length, the retrofitted Pinellas Suncoast Transit Authority (PSTA) bus is a community outreach tool providing computer access to the county's e-courthouse. Once aboard, citizens can register to vote, learn about emergency services, get brochures about county departments, learn about county job openings, and even pay their taxes. "Government on the Go" is convenient for elderly citizens and those without transportation, or citizens with little or no access to a computer or the county's Web site.

The county Communications Department took the lead on the project, but all departments cooperate to offer "Government on the Go." County officials say they hope to improve the "mobile" effort over the next few years by offering county information kiosks in shopping malls.

For more information, visit:
www.naco.org/Template.cfm?Section=Achievement_Awards&Template=/cffiles/awards/program.cfm&SEARCHID=2003citi32
Contact: Tim Closterman at tclosterman@pinellascounty.org

V. Best Practices in Media Relations

Instead of looking for a single county that creates the best press kits or a public information officer who writes effective news releases, this section focuses on *best practices excerpted and modified from media relations handbooks that were created in-house by individual organizations.*

Part 1 - Making Contact: The Media Wants Your Story

What do I do when a reporter calls me?

Step #1: Decide whether you will grant the interview. To help you decide, here are some questions to ask:

- What is the subject of the interview?
- Are you the appropriate person to answer questions about the topic?
- Who is the reporter and where does he/she work?
- What will be the format of the interview? Live? Taped? Telephone? Is it a feature story or a news story?
- Where will be interview be conducted and how long will the interview be?
- What is the reporter's deadline?

****See Appendix A on Sample Questions to Ask When a Reporter Calls**

Step #2: Prepare for the interview.

1. *Outline your main points:* Make a list of three to five main points you would like to make during the interview. These points should each be a brief as possible – you should be able to say each of them in 20 seconds or less. Reporters are looking for quotes – punchy lines that can be lifted for a "quote box" in print or a "sound bite" of air time. Make sure you get across your main points even if you have to repeat them several times.
2. *Background:* Because it is impossible to convey all the information you would like to convey in 20 second bites, handouts and background sheets are very helpful. Reporters appreciate having ample background material, and if your topic is complex, it is crucial to have handouts for reporters. This can be in the form of a prepared press release, a brochure, historical background, a fact sheet or statistics. Reporters love facts and figures that will lend credibility to their stories, but don't exaggerate figures or use superlatives to make something sound more impressive than it really is.
3. *Anticipate hard questions:* Make a list of questions you'd rather NOT answer, and then think about how you might best answer them. Also think about how you might transition from answering the tough questions into making one of your key points. Other staff members, especially in communications, can help you anticipate and prepare for tough questions.

<u>Step #3:</u> The interview: some dos and don'ts

1. *You're the boss.* Take the initiative – don't wait for the reporter to ask the questions. Remember your three to five key points, and begin making them right off the bat, even if it means going beyond the question you've been asked.
2. *Don't go off the record.* Even though a reporter may agree that your comments won't be attributed to you personally, that information may eventually end up in print if it is confirmed by other sources. If you don't want to read it in the paper, don't say it.
3. *Be brief and to the point.* Remember your three to five main points and make an effort to convey those points in 20 seconds or so. If there is one key message, say it in different ways, more than once. For television, about 45 seconds of response time is the maximum you will be given to make your point.
4. *Tell the truth.* Sometimes the truth hurts, but lies hurt worse and for a longer time. Your credibility and that of your institution could be at stake.
5. *If you don't know, don't speculate.* Simply refer the person to the appropriate department or your public information officer if you are unsure. Sometimes reporters will not distinguish between a personal opinion and the county's position, so it will be up to you to set the record straight. If you are the county's spokesman, identify yourself as such.
6. *Be friendly, after all it's an interview, not an interrogation.* Try to establish rapport with the reporter and be positive and courteous at all times. Never argue with a reporter, and avoid defensive answers. A combative answer or hostile body language makes great TV, but could be embarrassing to you professionally and to your county.
7. *It's alright to make a mistake*. If you have made a mistake on camera or in an interview, or if you find that you've strayed seriously from the question asked, simply stop and correct the mistake, or ask if you can give another response. Most TV reporters will prefer your new, briefer quote.
8. *Anecdotes and humor have their place*. Use them, when appropriate, to liven up a story, to add a human angle.

Excerpted from: NCSU news services Media Relations Guide, see "Sources: Part A"

<u>**Interview Preparation**</u>

<u>Planning your interview</u>

You always have the right to take time to prepare for an interview. Don't let a reporter bully you into responding off-the-cuff. *It is perfectly acceptable to tell a reporter that you need time to familiarize yourself with an issue.*

Pull all your notes and files and read over the information. Have those same notes and files accessible during your interview. No one expects you to have everything memorized and it is better to look something up than give the wrong answer.

<u>Developing talking points</u>

Any good interview will have a key message. First, determine this message and develop a few key talking points to help deliver it. Talking points are small, sound-bite sized sentences that flow in a logical order. **Most interviews will require only three or four talking points.** If your key message is about a new program at the county health department for elderly citizen flu shots, your talking points could be:

- The need for elderly citizens to get flu shots
- The ease of using the flu shot program for elderly patients
- The time and place of the program

In the interview, it may become difficult to deliver the talking points you have prepared. A reporter may ask you questions that don't correspond to your points or may be looking for an answer that is in direct opposition to your talking points. In the previous example, a reporter could try to ask you questions about why the county is not doing more to combat the flu. Use "bridging" to steer the interview back to your talking points. Some "bridging" phrases include:

- "The answer may come down to an individual's personal preference. What's important for the public to know is….<talking point>…"
- "It's difficult to talk about hypothetical situations. What's happening today is….<talking point>…."
- "To fully answer that question, you would need an expert on <reporter topic>. But I can tell you in general that….<talking point>…."

However, you must remember:

- Not answering every question of the reporter is not rude.
- Bridging is difficult and takes practice.
- Try to make your bridging sound natural and conversational.

Excerpted from: The Grantmakers Communication Manual by Christopher McNamara, see "Sources: Part A"

Understanding the three main types of interviews: TV, Radio, and Print

TV interviews

It's natural to become anxious when a TV personality requests an interview. Don't think you have to have the on-air demeanor of a Diane Sawyer or a Tom Brokaw – the public knows that this is not who you are. You don't need to dress any differently than you would everyday. Just be yourself. The important thing is to appear honest, straightforward and concerned.

Look at the reporter, not the camera. Think of it as a one-on-one conversation with someone you like and you will look more relaxed. Be prepared with visuals that may help make your story better. Suggest meeting the reporter outside your office in a natural setting or with a good city backdrop to create a better visual location.

Radio interviews

Most radio interviews are conducted over the phone. Prepare by cutting out all distractions. You might want to hold all your calls and shut your door to avoid people entering your office. Talk in a completely normal voice. It's OK to have an accent or to talk in your normal voice that may not be good for radio. Just talk so that you can be understood.

Print interviews

Print interviews usually last longer than radio or TV interviews. The reporter will want more detail. Make sure to block out enough time to do a print interview. If needed, pull other people from your office for the interview, especially if they have expertise on your program/issue.

Excerpted from: North Carolina Department of Environment and Natural Resources Media Training Handbook, see "Sources: Part A"

Making Corrections

Mistakes happen. A reporter may not get your story right, or they may miss a major point. Make sure to contact the right person right away in order to preserve your relationship with that outlet. You may want to consult your public information officer or someone else in the office first in order to get a second opinion.

Don't respond angrily – always start your discussions with the original reporter. If you don't get satisfaction from them, you may want to consult a higher-up, but not before.

A printed or on-air correction is rare. You will have to prove something is absolutely wrong in order to merit it. In general, even if you prove it, a correction will not run as prominently as the original story.

Headline errors are rare but do occur. A reporter rarely writes the headline. Call and talk to them, but don't blame them for the mistake. A headline will only be corrected if it is totally inaccurate. Don't expect much if you are complaining that a headline is sloppy or stupid.

Factual errors are much more common. Pictures with misidentified people or misspelled names are the most common. A printed correction is always in order for these types of mistakes. Other factual errors may be harder to deal with. If a story says you did something that you didn't do, you will want to talk to the reporter first. You can try to ask for a written correction, but, if you really want to be effective, try to convince the reporter to do a follow-up story that corrects the problem. It will be read by a greater audience.

Problems of misquotation or tone are unlikely to merit a correction. However, to put out a different message to the public, you can always write a letter to the editor or an op-ed that will appear in the same paper. Make sure to get this out as soon as possible after the original story to be more effective.

Excerpted from: North Carolina Department of Environment and Natural Resources Media Training Handbook, see "Sources: Part A"

Open Meetings

Under North Carolina law, some meetings must be open to the media. The Open Meetings law applies to official meetings conducted by elected bodies or by many bodies appointed by elected officials. In either case, this means that many of the commissioner meetings will be required to be open. Although there is a social purpose exclusion, be careful with it. If you talk business at all during your meeting, it becomes official and must be open.

The law does allow closed meetings for reasons such as conferring with attorneys, discussing personnel issues, or purchase of property. The board must take any votes, even on these issues, in a session open to the media.

Consider allowing a reporter to attend a meeting if he or she asks. If something is traditionally a closed meeting, you may want to open it up for public relations reasons. Be sure to explain that the meeting is usually closed but that you are allowing them to attend to remain as open as possible to their needs.

Excerpted from: North Carolina Department of Environment and Natural Resources Media Training Handbook, see "Sources: Part A"

Part 2 - Making Contact: Getting Your Story Out to the Media

Building Media Relationships

The key to building good media relationships is to understand how a media professional spends his or her day. It is usually fast-paced and unpredictable. They spend half their day on the phone trying to get facts or listening to pitches, so don't annoy them. Remember to be extra polite and professional if you contact them during unscheduled times.

Another strategy is to call them when you have no news to pitch (if they are not busy). Sometimes, they are happy to get a call that is not a news pitch. Compliment them on a well-written story and it will give you an "in" to introduce yourself.

Be familiar with a media outlet and their reporters. Read the paper, watch the newscast, or listen to the radio first, so that you learn what type of stories and formats they use.

Lastly, if you have the resources, gather detailed information about the media in your area and put it into a database. Even an Excel spreadsheet is better than nothing. You will find that many reporters move around quite often, so use your follow-up calls and emails to ensure that a reporter is still on staff. Update your media database annually at the very least.

****See Appendix A for sample worksheet on Media and Reporter Contacts**.

Excerpted from: Media Relations 101, The Visibility Coach, See "Sources: Part A"

"What makes a good news story?"

You make think a story is good, but it may not attract the attention of the media. To determine if a story will attract the attention of journalists, make sure it has one or several of the following elements:

- "New" news – A good news story is fresh and new. New services, treatments, equipment, staff and facilities are all newsworthy because they are new to the community.
- Timeliness – If something is happening now, yesterday or tomorrow, it's more likely to grab attention. If the story doesn't have an immediate time element, try tagging on to other events with timeliness. If you want to promote the good work of the parks and recreation department, highlight it on Earth Day.
- People – The best stories are told through and about people. While you may want to promote programs, facilities, services and future needs, use people to make that happen. Use anecdotes from citizens, family members, staff and volunteers to get better results.
- Controversy – Most stories in the paper today relate to some sort of controversy. "There are two sides to every story" is quite relevant in evaluating newsworthiness. However, when you suggest a controversial story, be ready for a reporter to ask you who might be opposed to your topic or idea.
- Involvement and scope – Story ideas that impact a large group of people, especially local people, will be more newsworthy.
- Weird or interesting – Things that make you say, "Hmmm, that's different" are always on the list. Let your staff know you are always on the lookout for interesting and different stories about your county.
- First or most – Anything that can be identified as the first of its kind will make news. Also look for biggest, best, smallest and most unique.

Excerpted from: Association of Washington Public Hospitals Public Relations Handbook, See "Sources: Part A"

Pitching

Pitching is when you contact a reporter by phone to suggest a story idea or material for publication. It is usually less than 60 seconds. Practice is key to pitching. Write down your script or outline the key points you want to hit. Always ask the reporter, "Do you have a minute?" or "is this a good time?" Feel free to leave a pitch on voicemail, but follow up in a day or two.

Excerpted from: Association of Washington Public Hospitals Public Relations Handbook, See "Sources: Part A"

Communication plans

Every county should develop a communication plan to help you get the most from free media. Some questions you may need to ask before you begin are:

- What is your goal?

- What do you want the media to tell the public about your county?
- Who is your audience?
- What media are you going to use to reach them?
- What resources are available to you?

Communication plans can include a number of elements. Options are as follows:

News releases

A news release provides information about an issue in a standardized format. A release must be concise. In general, it should be kept to one page if possible.

You should **never rely on a news release as your only communication tool**. Follow up with a call to make sure the media received the release. Make your call short and to the point. Don’t call too much, or the reporter may ignore your event because they are tired of your harassment.

Fact sheets

Fact sheets are easy to do. They lay out the main points of your program. They should include the following information:

- The name, location, size, population, etc., of your county
- Names of your county manager, commissioners, etc.
- County historical facts
- Important county programs and services

Fact sheets are good to have on hand for anyone who wants information. They are also a good basis for material to put on the Internet. Sample fact sheets can be found at the offices of most major organizations and on their Web sites.

Web sites

Web sites are fairly easy to create. Some of the most useful sites are very simple; they just respond to frequently asked questions. The web is also a good place to post news, white papers, directories, etc.

News conferences

If you are going to have news conference, be sure that you have something very newsworthy to announce. Be judicious in scheduling these. Ask yourself if you really need to have a conference or if the same information can be distributed by contacting reporters individually.

Media events

A media event will usually get more coverage than a news conference. It gives reporters pictures as well as words. Ask yourself if you can get the affected parties of your program or service to participate in the media event. This will help tell your story.

Interviews

Some newspapers or TV stations have reporters who cover particular beats such as health or the environment. If you or a reporter is new in the area, you may want to sit down and talk with them about a relevant issue. This is an excellent way to establish yourself as an expert in that area, and on county government in general.

Columns

Smaller newspapers may be interested in a regular column. This is a usually a good idea, but with a full Board of Commissioners to answer to, you may raise a political issue or resentment among the group. You might want to have a commissioner column where a different commissioner writes the column every week.

Op-eds

This is an opportunity for you to write a column that provides more than just information. Here, in an opinion or editorial column, you can provide your stance on a given issues. Again, be careful to avoid political resentment from other board members.

Excerpted from: North Carolina Department of Environment and Natural Resources Media Training Handbook, see "Sources: Part A"

Communicating effectively: Writing news releases

A press release is your first and best chance for communicating why your story is worth media attention. It is the one tool most reporters ask for directly. The release must quickly tell the story and make it appear newsworthy, but also must be as accurate with names, facts and figures as possible. Consider the following points when writing a news release:

- Keep it short and simple
- Answer the who, what, where, when and why of the story
- When appropriate, use quotes to share opinion or praise
- Avoid adverbs, adjectives, and qualifiers that do not add to the story (i.e. "very")
- Identify your county at the end of each news release
- Use 8 ½ x 11 paper, with county letterhead if available
- Double space paragraphs
- Double check for errors
- Have an uninformed party read the release for readability and accuracy.

Excerpted from: Association of Washington Public Hospitals Public Relations Handbook, See Sources: Part A

Lead times

The length of time before a story or article goes to press is called a lead time. It is helpful to know the different lead times between media outlets. Keep in mind that for a written story, a reporter will spend much of the day before writing. If you have last-minute changes, make sure to contact them early in the day.

Some TV editors will be receptive to a last-minute video opportunity, but only if it is brief and easy to capture (the public appearance of a celebrity or politician). Major stories with video opportunities will need to be researched and communicated to the station weeks in advance. Local magazines or newsletters usually have a much longer deadline. If you want a story to appear in a November issue, make contact by Aug. 1 to ensure that it will appear.

Excerpted from: Media Relations 101, The Visibility Coach, See "Sources: Part A"

Crisis communication

Most of the time, county officials should be encouraged to talk freely with reporters about a story they are involved with. That's not the case in a crisis. Coordination of communication – ensuring that you give out the correct information with one voice – is essential during a crisis.

Hurricanes and tornadoes are clearly crises. However, defining a smaller event as a crisis can be tricky. Consult your fellow commissioners, county manager and managerial staff as to whether or not an event should be treated as a crisis. Have a full meeting to ensure that everyone receives the message about the crisis and that everyone has the same crisis communication plan.

The best way to deal with a crisis is to coordinate all of your media messages out of one office. Have the media contact the public affairs office, or if there is not one, contact the county manager. Be sure to issue regular news releases to reassure the public.

Have on hand a regular listing of emergency numbers, including after-hours media numbers. This will help you to stay organized when the time comes.

You may want to hold a post-crisis meeting to determine what worked and what didn't. Ask the media for their opinions. Use this information to prepare a better crisis communication plan the next time.

****See Appendix A for Crisis Communication Response Worksheet**

Excerpted from: North Carolina Department of Environment and Natural Resources Media Training Handbook, see "Sources: Part A"

Best Practices in Brief

These best practices are commonly used by many counties:

- Gaston County has a specific day set aside as **County Government Day**. Its purpose is for citizens and students to explore county departments, such as fire, police and health, through interactive activities and booths. In Gaston, the event is held at the judicial complex and the county government offices. Other counties have chosen to do a county government day similar to a festival, with music, dancing and food vendors.
- Rockingham County tries to get its message out to the media through what they call "**e-mail blasting.**" The county public information officer creates a press release with important county information, and then sends it to every local media outlet available (newspapers, TV, etc.) by e-mail. The media can choose to use it or ignore it, but the county still attempts to push the word out, rather than having the media initiate the contact.

Public Information and Media Relations
Summary of Findings

In doing my research and interviews on public information, a common concern continued to crop up: the contrast between large and small counties. A large county will have more resources to hire a public information officer, hold county-funded events, and develop or purchase the necessary technology to reach out to the new "Internet" world. How do the smaller counties afford this?

As one PIO asked, "How do we get our message to a TV audience when we can't afford TV production, nor will the surrounding 'richer' counties put out our information on their expensive TV stations?" Such is the conundrum of county media and public relations. Large counties do it well and are always rolling out innovative forms of communication. Smaller counties are struggling to get local papers to run positive stories.

Another general concern is the lack of counties with public information officers. Roughly 25 percent of North Carolina counties have a staff PIO. It may be due to a lack of funds in the budget or proper resources, but some counties may be choosing to pay little attention to media and public relations in general?

Maintaining good working relations with media outlets has never been, and will never be, easy for local governments. The media is much more apt to cover a negative story than a positive one. However, county government officials need to take some responsibility for the lack of positive media coverage. County officials should make sure that any media outlet that producing a story that portrays county government in a negative manner still receives the county side of the story. County officials also need to make a concerted effort to generate excitement and positive publicity for their public information events and programs.

For example, if your county purchases and installs Webstreaming equipment for Board of Commissioners meetings, don't just advertise the new technology on your Web site or your TV channel. Contact the local media and build a story around new county initiatives in technology. Make sure to throw in other positive newsworthy events, services or recognition for hardworking county officials. **Public information initiatives can transform themselves into media opportunities with a little extra time and effort.**

County efforts in media relations often fall short. We can blame this on a lack of interest in local government, a society that's obsessed with negative news, and the inability of county events to generate adequate coverage. But what needs to be looked at is the **structure of the county government organization** itself. Most counties do not hire professional communications employees for media relations purposes. Nor do they have the proper technologies or relationships in place to effectively place their message. The next step is for county government officials to **evaluate their current media capabilities and compare it with those groups that receive a wealth of media coverage**. Often, generating positive media coverage is not about who has the better story or more money, but who has the technology, the connections, the relationships, the know-how, and the initiative to get their side of the story out.

More importantly, **media relations cannot be about trying to target all of your citizens at once**. Each media outlet will reach a different group, and county governments should make an effort to tailor media messages to the outlets they use and the groups they reach. It is much more effective to reach a smaller group with a specific message or service than it is to try to send out a general message that may be ignored by most people.

The first step to positive media relations is creating a media relations handbook. This does not require hiring a consultant. Borrow from others with online guides such as the N.C. Department of Environment and Natural Resources, use the best practices listed in this report, or buy a book about media relations and tailor the handbook to the specific needs of county government. **Most guides will contain the same basic information**. Use any version you want. Give a copy to each staff member and hold a meeting to discuss its contents. Make sure that everyone in the organization understands the importance of media to government, and that each person is committed to sending a positive message to the public. Everyone has the same need for media coverage and with the proper tools and information, that coverage can be open to everyone. In the future, the NCACC may look into media relations guides and handbooks to create their own version for general county use.

A media relations guide can serve as the essential reference for all media relations questions, but a Web site will be a more frequently used resource. Several Web pages have been created that address: 1) media relations and getting your message out to the media; 2) media relations and what to do when the media approaches you; and 3) public information strategies and best practices. These are only the results of weeks of research. They will need to be continually updates with new NACo award winners, Outstanding County Program Winners, etc. The City-County Communications and Marketing Association (3CMA) is also a great resource for media relations and public information best practices. I suggest that our communications director, Todd McGee, join this group and utilize their Web resources and conferences. This information can be used to update best practices on the Web site and to add to a potential NCACC County Media Relations Guide.

Times are changing in media relations. Younger generations are getting their news and information from newer forms of media, not newspapers local TV newscasts. Government officials need to find new ways (e-mail, Podcasts, major public events) to reach a younger demographic. Also, the makeup of the country, in terms of ethnic groups, is rapidly changing as well. New techniques to reach an ever-growing Hispanic population must be considered. Since many immigrants may not be able to read in English or lack Internet access, other outlets such as radio and TV will be more and more important in reaching this population. The NCACC can make use of its Annual Conference and *CountyLines* to address these issues. Commissioners need to be aware of the changing nature of technology and demographics as it is happening, not when it is too late.

Section B: Best Practices in Board Leadership and Development

I. Advice from Scholars: Articles on Board Leadership

Categories of board leadership: The Local Government Governing Model

According to Professor Vaughn Upshaw of the Institute of Government at the University of North Carolina at Chapel Hill, leadership within a board is not as simple as having a seasoned board chair with strong leadership qualities. It is about the cohesiveness of the board and their understanding of board leadership that allows a board to accomplish its goals. This means that every member must develop these qualities. Upshaw's Local Government Governing Model in the article "Essential Responsibilities of Local Governing Boards" creates the following categories of board leadership: (Upshaw 2006):

1) Understand legal authority
2) Work with others
3) Set policy
4) Provide resources
5) Be accountable

It is important to note that few models focus on the responsibilities of elected boards at the local level. Upshaw's Local Government Governing Model is an attempt to adapt the models from the nonprofit, healthcare and university boards models into a local government model that adds in elements relevant to local government (Upshaw 2006). The importance here is that the model focuses on the *responsibilities of a governing board, not a single elected official.*

Upshaw provides a guide in going through the model. See *Appendix B.*

Common mistakes board members make

Philip Boyle, a well-known consultant on board leadership, points out that although the problems that boards face may be different, each board must deal with similar mistakes and poor attitudes. In his article "Effective Board Building: Creating and Maintaining a High-Performance and High Satisfying Governing Board," Boyle outlines some of the common mistakes board members make. These include:

- Lack of patience
- Poor behavior, "acting out"
- Not seeing the forest for the trees
- Personal or hidden agendas
- Getting stuck in the same alliances and coalitions regardless of the issue
- Lack of ground rules
- Ways of speaking to members that are hurtful or close down communication (e.g. lecturing, chastising, threatening, bullying, etc.)
- Competition, turf, fairness, zero-sum games, winners and losers

- Too much talking, not enough listening
- Too little leadership and skills building

Consequences of these mistakes lead to bad communication, reduced trust, increased stress, low energy, poor decisions and a loss of community respect.

Excerpted from "Effective Board Building" by Philip Boyle, see "Sources: Part B" For full article, see Appendix C.

Ground rules for effective boards

As a group, commissioners should agree to ground rules before holding formal meetings or making decisions. These rules should be distributed to board members and discussed on a regular basis, especially at board retreats. Some sample ground rules are:

- Share all relevant information
- Be specific, use examples
- Explain statements and actions
- Keep the discussion focused and to the point
- Don't take cheap shots or otherwise distract the group
- Make decisions by consensus
- Disagree with any member, but do it openly
- Invite questions, comments and feedback

Excerpted from "Effective Board Building" by Philip Boyle, see "Sources: Part B" For full article, see Appendix C.

Dealing with difficult meetings and conversations

Meetings are central to the function of a board. However, they are also hotbeds for arguments and long discussions that lead nowhere and result in ineffective decision-making. Boyle offers some tips for handling meetings and conversations between board members:

1) Ask open-ended questions ("what results do you want to achieve?") in order to help another member identify their own solutions to a problem.
2) Ask for specifics and take notes. Ask an angry person to give details about why they are upset. It may calm them down.
3) Use writing as an effective communication tool. It will help you present your points in an orderly fashion and gives people something to take away.
4) Turn "us" and "them" into "we." Highlight similarities between you and your other board members. Suggest that you do things cooperatively: "Let's find the information together."
5) Listen attentively and acknowledge. Even if someone is blowing off steam, it may provide you with insight into the problem.
6) Restate – make sure you understand what they are saying.
7) Reflect – offer an empathetic response that verifies the person's feelings.
8) Reframe – ask them what is going on, what they were thinking, or why they took a particular action. This helps people feel heard and understood.

9) Establish realistic expectations – help others understand that even though they may be frustrated, it isn't the result of unfair or arbitrary action.
10) Use peer pressure. Don't pressure people to see things your way, but rather, make them responsible for their own actions. Remind them of the consequences of angry tirades. Have them use their name before each speaking turn to increase accountability and remind them if they are talking too often or too long.

Excerpted from "Effective Board Building" by Philip Boyle, see "Sources: Part B" For full article, see Appendix C.

Board evaluation

Board evaluation is a seldom-mentioned practice, but is slowly growing as an important example of how to create sound governance and develop a board (Plumptre 2006). As Tim Plumptre points out in the article "How Good Is Our Board?" several reasons exist to justify evaluating your board, including searching for missing governance functions and looking for weak areas of performance. But most importantly for a county board, *evaluation creates a shared understanding of goals and issues and helps build the board into a working team.*

First, make preliminary decisions about your evaluation. Evaluation does not need to be a formal process, but it does need to be a concentrated one. Preliminary board evaluation best practices include:

1) Decide if the evaluation will function as short- or long-term change. Short-term change would include more effective meetings, better media relations and increasing stakeholder involvement. Long-term change might involve assessing the effectiveness of the board's strategic planning and mission and making necessary changes.
2) Ensure that the evaluation leads to an actual change; create an implementation plan and assign several commissioners as "monitors of change."
3) Make sure to decide if the board itself needs an overhaul. Ask: What kind of board do we want, and what kind of board does out county need? (passive, proactive, advocate, etc.)

Next, you should decide on the focus of your evaluation. The focus can be many things. The three main best practice categories to focus your evaluation on are:

- Participation – Do members understand their responsibilities? Are they familiar enough with county government processes? Are they prepared at meetings? Do they discharge tasks or roles in a responsible way?
- Process – What is the board's main focus? Is it too consumed with side issues and briefings? Are meetings run well? What is the chair and/or managers role in setting meeting agendas? Does the board set objectives for the manager?
- Performance – Does the board contribute to the organization's vision and strategy effectively? Does the board exercise the required financial oversight? Is the board aware of key stakeholders and constituents? Can the board handle an unexpected crisis? (Plumptre 2006)

The last task in the evaluation is to choose an evaluation method and put it to use. Suggested best practices are:

1) Simply ask a member to comment on how each meeting or session goes at the end. They can even submit a brief memo to the chair if that is more effective.
2) Written questionnaires and interviews with commissioners, the manager, constituents, staff, etc. Be wary: these can be time consuming and offer false insights if they are not take seriously. Interviews take more time, but are often more accurate.
3) Have the board do internal evaluations (of each other and themselves). Make sure to use a neutral third party to report to (past commissioner, manager, other staff).
4) Discuss how the evaluation will be used for improvement. Do not let this be a wasted opportunity to improve the board.

Excerpted from "How Good Is Our Board?" by Tim Plumptre, See "Sources: Part B"

II. Best Practices from County Leaders in North Carolina

J. Claude Mayo Jr., Nash County commissioner

Claude Mayo knows that an informed board makes better decisions. His motto for achieving an educated board is **"open communication, no secrets."** He makes it his goal to ensure that every member has the same information. He will sit down with the board members individually and collectively so that the same information is received by everyone. This helps reduce in-fighting within the board, because it reduces alliances and coalitions and creates a neutral environment for decision-making. Open communication means that when an issue of contention comes up, you must sit down and have a collective meeting about it in order to come to an agreement or at the very least, an understanding.

An informed board must have **information externally as well as internally**. Mr. Mayo relies heavily on the county manager to meet constantly with the board to update them on administrative and budgetary issues. Another external source of information for Nash County is technical experts. For example, when working on water quality issues, an engineer from the local water plant was brought in to make a presentation. The key to making a good decision for this board is a reliance on hard information rather than speculation.

Robert Greer, New Hanover County commissioner

For a county board, **acknowledging your disagreements** can be just as difficult as handling them. Robert Greer of New Hanover County realizes that his board will never fully be in agreement about most issues. So, his approach is to try to bring those disagreements out within the board and discuss them fairly. He does this in three ways. First, he holds meetings with staff in addition to regular board meetings. A staff meeting consists of the board, the county manager and several other staff members. The staff helps outline important issues and helps set the agenda for the board's next meeting. Not only does this improve the board's knowledge, but more importantly, it gives board members an opportunity to see where each person stands on an issue, preventing any surprises later.

Secondly, Greer sees that another way to create awareness about disagreements is to address them upfront. New Hanover commissioners gather for a retreat each year to discuss new issues for the year and to "clear the air" about old ones. During the time that the issues are discussed, everyone at the table is able to gauge where contentions may occur in the future.

Lastly, Greer makes a point of ending each meeting with an acknowledgement that if an issue is not resolved, the board will "agree to disagree" and work on it at the next meeting. It may seem like a small gesture, but this statement serves as a reminder to the board that they are all mutually working toward the same goal: an effective county government.

Sara Haire Tice, Iredell County commissioner

As Iredell County's first female chair, Sara Tice was faced with the daunting task of running an effective board while at the same time working to gain their respect. Her formula for success: **Respect for the board = respect for the chair**. There are many ways to show respect for people, but on the Iredell County board, the best way to do that is to create an even playing field for everyone.

In her words, Sara Tice "sits back and lets the other commissioners take the lead on their pet projects." It is important for her to remind each member, and herself, that all the commissioners were equally elected by the public and should have an equal part in the board. Her best practice is to **sit back and allow the commissioners their own time to discuss and work on issues important to them**. As chair, she takes special care not to overshadow or attempt to control them. Most importantly, she allows them to do most of the talking.

Additionally, when a commissioner has worked especially hard on an issue, it is important to build board morale by **recognizing that effort** at board meetings, in the media and even public events, if appropriate.

Kenneth Robinette, Richmond County commissioner

County commissioners will always have to deal with the political side of their jobs. However, it is important to keep personal politics out of the board room, according to Kenneth Robinette. A county commissioner for nine years, Robinette has developed several best practices to achieve this.

First, he makes the county manager the clearinghouse for all county information. Every commissioner gets his or her information from the county manager in a daily e-mail, so that everyone is receiving the same thing. **Using a neutral party as the source of information and communication helps reduce political in-fighting**.

Next, it is helpful to run your board as you would a **business board**. Remind the board that its job is to set policy, not to enforce a political agenda. If the board gets tied up in too many extraneous activities, clear the air and get back to a policy focus by delegating some responsibilities to other groups (planning board, county manager, other departments).

Lastly, go through an **extensive planning process**. Richmond County holds an annual retreat in which the board discusses its one-year, five-year and 10-year plans. Commissioners revisit each goal and ask themselves "what did we accomplish in each of these?" The chair tries to keep the planning process on task by focusing the discussions on core needs, such as economic development. As Robinette points out, the mission of the board should be clear to everyone, and if it is, the planning process will be much easier. If you are doing your job as chair, **the only planning conflicts you will have will be procedural.** The board can disagree about *how* something should be done, but should never disagree about *what* should be done.

Herb Hincks, Lee County commissioner

The key activity for any county board is its board meeting. It is the central point for board interaction and decision-making, yet many boards have trouble running effective meetings. In Lee County, Herb Hincks has made an effort as board chair to make sure his **meetings run smoothly**.

According to Hincks, to set the stage for a good meeting, board members must be kept up-to-date about issues between meetings. He assigns the county manager the task of e-mailing and calling commissioners about these issues so that there are no surprises or angry reactions from board members once a meeting is under way.

Lee County board meetings are run according **to the written rules and procedures** for meetings sent out by the UNC Institute of Government. These rules are discussed often and a copy is given to each new commissioner. Some examples of these rules are: 1) waiting to speak until recognized by the chair; and 2) no second is required on any motion in a county board.

Hincks has made several of his own best practice meeting rules. He sets every **board meeting agenda with the county manager**, and asks that county commissioners check with him about an additional agenda items beforehand. This allows new issues to be discussed and framed so that they will fit into the current meeting. If the chair feels that the issue will need more discussion time than is available, or there is a need for further research on that issue, it is moved to the next meeting.

Hincks says it is important that commissioners be respectful to each other and guest speakers during meetings. He **reserves the right to interrupt a commissioner** if they are asking questions that are too difficult, taking too much speaking time, or simply being rude to someone else in a meeting.

<u>Mary Ann Black, former Durham County commissioner</u>

Effective communication at board meetings is clearly important, but Mary Ann Black, chair of Durham County for six years, knows that it is the **"behind-the-scenes" communication** that really makes a difference. Mary Ann called every board member before each meeting to find out what questions they might have about upcoming issues. Identifying those questions before they arise publicly allowed her to contact the county manager and staff so that information could be prepared and available for them at the meeting.

To maintain proper rapport and hold animosity to a minimum, Mary Ann insists that it is important to reach fellow board members on a personal level. If a board member is angry about a certain issue, she advises that you speak to them on the phone, or before or after a meeting. Make sure that you do not seem like you are lecturing them. Instead, find out where their anger is coming from. Try to show empathy by listening carefully and telling them that you understand. Suggest ways to resolve the conflict in the next meeting, and remind them of their duty to the public. They should always be aware that the public needs to see them as even-minded, just and professional. Sometimes a reminder of their status in the public eye will inspire a commissioner to quickly end the conflict.

Setting the tone within meetings is another of Black's best practices. In an attempt to run an organized meeting, she made sure to keep note of who had spoken and allow everyone an opportunity to speak on an agenda item. She also recommends that a chair must be able to control a meeting, even if it means interrupting a commissioner or demanding order form the public. As long as respectful words and a calm tone are used, most people will respond to your attempts to maintain an orderly meeting.

Nathan Ramsey, Buncombe County commissioner

Nathan Ramsey is the only Republican commissioner among his Democratic counterparts in Buncombe County. Not only is he well-respected, but he serves as chair of the board. So how does he maintain a good relationship with his board, when his political affiliation is at odds with all other commissioners? He says that the best way to avoid partisan battles is to **stay focused on the mission**. During each year's planning process, the board must agree on its focus for the year, which in Buncombe County's case is the budget and land use issues. If the board mutually agrees to put partisan differences aside and stays focused on this mission, it will not allow politics to cause internal problems. As fellow Buncombe Commissioner David Young states, "It is not the partisanship that creates problems with in a board. It is the lack of a single focus. If every board member is pouring their energy into a different issue, that's where the fights begin."

Ramsey also advises that as a board member, you should remember occasions when another board member takes your side or concedes something in order to achieve a greater goal. **Every board member needs to be willing to give a little to accomplish a lot**. However, he warns that you should never expect payback from other members. The "your scratch my back, I'll scratch yours" mentality is dangerous and can cause resentment between members.

Carolyn Carpenter, Cabarrus County commissioner

As former board chair and long-time member of the Cabarrus County Board of Commissioners, Carolyn Carpenter has learned a lot about teamwork. Although there are many different team-building strategies available, Carpenter notes that a team will not work together well unless it knows each other well. She suggests that boards hold a **retreat specifically focused on communication and getting to know other**. Cabarrus County would hold its communication retreats on a single weekend, using an outside facilitator from the Institute of Government. Any board doing this type of retreat can try things such as team building exercises, ice breaker sessions, or learn about their communication styles through different tests and surveys.

Spending time to get to know other members may seem trivial when important county issues must be discussed, but it is the knowledge and understanding of other board members that will help create a connection, and as a result, solve those important issues more quickly and with less conflict.

George Graham, Lenoir County commissioner

Lenoir County starts each year by **agreeing on ground rules and a mission**. At their yearly retreat, commissioners spend time discussing and debating important issues that should be their focus. Board Chair George Graham says that allowing time to debate these issues helps in reaching a consensus mission. If each commissioner feels they have had their say, they are more likely to agree to the final decision.

Graham stresses that this focused mission must be kept throughout the year. He emphasizes that the **issues should be kept local**; never get off track by advocating for a state or federal agenda. Remember that you are always a local official first, not an advocate for a party agenda. Lastly, he notes that that politics will always play a part, whether you like it or not. **Don't fight for a unanimous decision**; move on when you need to and don't get caught up in your disagreements.

<u>Breeden Blackwell, Cumberland County commissioner and 2004-05 NCACC president</u>

Blackwell asserts that in order to be a leader, your board must first see you as a leader. Some key characteristics or actions are:

- Stand out in the group.
- Never waffle on issues.
- Have the ability to deal with the press well.
- Speak well in public and project a good image (dress appropriately).
- Think on your feet.
- Never point fingers.
- Don't cut other members down, either publicly or privately.
- Expect to not get your way sometimes, and don't throw a "pity party" when you lose.
- Build a spirit of cooperation. Calm infighting instead of joining in.

As NCACC past president and longtime Cumberland County commissioner, Blackwell knows all about leadership development and is an excellent county leader. With his extensive experience, Blackwell has developed many board leadership best practices over the years.

Trust, Blackwell noted, is an essential element to any well-functioning board. Never lie to your board or your constituents. Don't promise people what you can't deliver. If you are honest, people will respect you more as a leader. Trust can be best built through face-to-face communication. He recommends that you use e-mail for simple questions and notes, but for serious conversations approach someone face to face. Try to connect with your board on a personal level. Remember their birthdays and send them a card, or try to arrange a social gathering, such as a dinner, for your board. Remember: you truly cannot govern alone. Don't worry about which member gets the credit for successes, but rather think of it as a victory for your entire county.

An "effective meeting" may seem like an oxymoron. But with an effective chair and an informed board, Blackwell said, **meetings can be extremely productive**. Set time limits for the meeting and don't be afraid to remind your members that time is running out. Make sure that members know which issues need to be voted on in that meeting. Don't have any expectations about which issues will dominate the meeting. You may be surprised about what people will argue over, so be ready for anything. If a major fight seems to be brewing, the chair can have a calming effect by deferring to the manager for more information on an issue. It may seem like avoidance, but this action can allow members to calm down before the next meeting.

Lastly, **remember that every board will probably have a "gunslinger."** This is the person who is out to push an individual agenda, get their way, and often causes the most problems in board meetings. Try to work with this person on an individual level in order to get them to work with the team. If this does not work, as it often does not, simply work with the other members to outvote them.

<u>Kitty Barnes, Catawba County commissioner and 2005-06 NCACC president</u>

Catawba County Chair Kitty Barnes attended the County Leadership Institute Conference 2006 at New York University. Although many issues were discussed at the conference, she reported that a few best practices stood out to her.

First is that you must see **leadership as an activity, not an idea**. A county leader must be proactive in creating change inside and outside their board. One way to get started is to **find out your leadership style**. This can be done through Myers-Briggs typology, leadership styles surveys and communication styles surveys. Have a professional administer these tests and then discuss the results with your board. Be aware of the different personalities and approaches around you in order to construct a solid change-making board.

In another session at the County Leadership Institute, Kitty learned about a practice called **Q-storming**. In this type of session, you begin by thinking about a difficult issue in your county, one that is not yet resolved. You relate this issue to the other members in your group in as much detail as possible. Q-storming is like brainstorming, but instead of solutions, you come up with new questions related to your problem. To begin, the group will ask you clarifying questions about your problem. Then, with no discussion, they will write down questions they might have had related to the problem. When the question cards are presented to you, the result should be that you get a better understanding of where the issue might need to go next, and also, why that issue is important to you. Q-storming also helps you examine any personal biases you may have on the issue. You may get a question such as, "How does the choice of a new school site affect my family?" The intention of this exercise is to use impartial peers to help examine new possibilities to solve a major county problem. It is important to choose people outside your board (citizens, county staff, family members, etc.) in order for the exercise to be effective.

As for her own best practice recommendations, Kitty says that the structure of the board in Catawba County makes it unique. The board has **standing "subcommittees"** dedicated to areas such as policy, finance and facilities. Each committee has five members, and two commissioners are assigned to serve on them. These subcommittees help diffuse responsibility and are quicker to gather information on an issue than the entire board or the manager might be. Subcommittees funnel issues into Board of Commissioners meeting agendas.

<u>Tom Lundy and Catawba County Management</u>

The first step toward board development is an orientation. Catawba County is a prime example of a place where board members receive a great introduction to county government.

County Manager Tom Lundy and his staff begin things with a **"candidate orientation."** As soon as candidate filing closes, Catawba County holds together a one-evening event for candidates. The potential commissioners are presented with a huge binder of county information, and the county manager proceeds to discuss many of its contents. The orientation tries to place emphasis on knowing the law and acting as a board, not as an individual. An overview of county issues and county departments is also presented. Lundy stresses that the county manager will be there throughout their campaigns to answer basic questions, but that he remain impartial throughout the election.

After the election, Catawba County holds another **orientation for the newly elected commissioners**. This session usually lasts two days and is much more detailed than the previous orientation. The commissioners meet directly with all county department heads and discuss issues facing each respectively. The new commissioners also tour all county buildings and facilities.

Lundy says he is proud of the commissioner orientations in his county. He believes that they work well for three reasons: 1) it creates the openness of the management team and presents the team's willingness to share information on important issues; 2) it arms commissioners with factual information about the county and, more importantly, key facts about their new positions; 3) it provides commissioners with a comprehensive education, not what management think commissioners should know.

<u>Lori Brill and Onslow County Management</u>

Onslow County wants to ensure that its commissioners understand their jobs, but more importantly, that they understand what every department in Onslow County does. They created a program called **"The Nuts and Bolts of County Government."** The program, which runs over a two-week period, begins with a brief by county management about the logistics of the program. The commissioners are given a binder that explains all the county departments and their functions, all legal and statutory requirements, the role of the commissioners, and available resources such as the NCACC.

After the briefing, over several days, commissioners schedule half-day blocks to visit county departments, meet employees, and ask about current issues and problems. Assistant County Manager Lori Brill, explains that these visits are like "feeding the commissioners with a firehouse." They receive a lot of information at one time, but the purpose is to immerse them in county government and its functions. Instead of just reading a binder, they physically visit offices. Commissioners are not only oriented to their new jobs, but they are faced with the reality that they will be co-dependent on the staff and the manager throughout their term.

III. Consultants and Presenters in Board Development

Most consultants will not offer advice or suggestions on board leadership best practices outright. They will want to be compensated, and rightly so. It is their job to be experts on this subject, so don't expect consultants to offer information free of charge.

Consultants are well-trained and experienced in board leadership and development, so it is important to keep track of good speakers to tap for conferences and further best practices research. A sample list of consultants and presenters who commonly focus on board development is below.

1) Lyle Sumek

Lyle Sumek Associates, Inc. is a consulting organization that specializes in team building, strategic planning and goal setting for local governments, and developing more effective governing bodies and governance processes. The company's headquarters are located in Heathrow, Fla. Sumek has been a local government consultant since 1979.

Sumek speaks at events by request. He gave a keynote speech at NACo's 2006 Annual Conference on Aug. 5 in Chicago, and ran two workshops: "True Vision: Making Your Dreams Come True" and "Performance Leader – Driving the County Bus to the Future."

For more information, visit www.lylesumek.com.

2) John and Miriam Carver

John Carver is the developer of the Policy Governance model. Policy Governance is an integrated set of concepts and principles that describes the job of any governing board. It outlines the manner in which boards can be successful in their servant-leadership role, as well as in their relationship with management. Most of the Carvers' presentations are geared toward a general board audience, with some more specialized courses also available. The Carvers offer self-sponsored introductory workshops in both the spring and fall. These are followed by a Policy Governance Academy, which is more intensive and application-based. The Carvers will present workshops by request.

John and Miriam have scheduled an introductory board training for Sept. 15-16, 2006, in Atlanta. They also have a Policy Governance Academy scheduled for Oct. 16-20, also in Atlanta. Each registration is done on an individual basis through their Web site, www.carvergovernance.com/index.html.

Additional workshop engagements are also posted as soon as they are scheduled. No 2007 dates have been set as of this writing.

3) ICMA

ICMA offers a myriad of workshops for public officials. Despite the fact that many of ICMA's workshops cater to the executive side of the spectrum, a handful of offerings would be pertinent for elected county officials. Several examples include:

- Reducing the Costs of Conflict in Local Government

- Understanding and Appreciating Differences: Using the Myers-Briggs Type Indicator
- Get the Most From Your Team
- Building Better Relationships with Elected Officials

ICMA usually partners with local governments or universities to offer these programs, so it is necessary to call if you have particular interest in a workshop. Contact Debbi Reid at (202) 962-3599. For more information, visit www.icma.org/main/bc.asp?bcid=129&hsid=1&ssid1=308&ssid2=316.

4) Marty Linsky

Author and consultant Marty Linsky splits his time as a Harvard professor and as co-founder of Cambridge Leadership Associates. Cambridge Leadership Associates focuses on a strategy called "adaptive" leadership, which is a "set of strategies and practices that can help organizations and the people in them break through gridlocks, accomplish deep change and develop the adaptability to thrive in complex, competitive and challenging environment." This consulting group offers several public events.

Learning to Lead Adaptively is a two-day public, open-enrollment program that helps participants apply the strategies and skills of Adaptive Leadership to their own individual and organizational leadership challenges. It is held in major cities throughout the year (dates can be found on the Web site, www.cambridge-leadership.com) The Adaptive Leadership Institute will soon also scheduled by Cambridge Associates, but is currently in its planning stages. Both programs are expensive – around $2,000. The next Learning to Lead Adaptively is scheduled for Oct 12-13 at the Doubletree in Washington, D.C.

Cambridge Leadership Associates also two client services: introductory programs and consulting services. Introductory programs introduce the concept of adaptive leadership to its participants, and can take the form of keynotes, workshops or all-out training. Cambridge Leadership Associates also offers longer-term consulting services by request. Contact Tina Kruczynski at (617) 576 – 5766.

NACo conferences and the County Leadership Institute may offer a more economical option. Marty is often tapped as a speaker or workshop facilitator for these events.

5) Donna Zajonc

Donna Zajonc works as a consultant for Bainbridge Leadership Associates, which offers various workshops based around self leadership, collective leadership and public leadership. Bainbridge leadership focuses on consensus-building, teamwork and communication. For more information, visit www.bainbridgeleadership.com/index.html.

Donna also works as a workshop leader and keynote speaker on an individual basis. Her most popular workshop is entitled "Healing America's Polarization" and tries to look at new ways to harness the political machine for the good of the community. As a keynote speaker, she has several prepared topics such as "healing post-partisan depression." Her services are available by request. She has no scheduled engagements on the east coast in the near future, but hosted a pre-conference workshop at NACo's Annual

Conference in Chicago in August 2006. For more information, visit www.politicsofhope.com or call (206) 780-9900.

6) Doug Eadie

Doug Eadie, president of Doug Eadie and Co., has previously presented at NACo conferences and spends roughly 50 percent of his time consulting with state and national public associations. His résumé includes work with cities, counties and school boards. He schedules workshops and consulting work on an individual basis. His two main areas of focus are: 1) governance/board leadership; and 2) leading change. His workshops and presentations are designed in cooperation with his client and they are tailored to a particular public or nonprofit audience. For more information, visit www.dougeadie.com.

Doug is also involved with a group called "governance edge" that provides distance education services for clients who may be pressed for time or money. Doug holds "Webinars" that can be broadcast to various sites throughout the country and are prepared by request. For more information, visit www.governance-edge.net/webinar.htm.

Doug has no scheduled dates in the N.C. area as of this writing. Contact Doug Eadie at (800) 209-7652.

IV. Leadership Resource Library

Articles, Presentations, and Publications

Boyle, Philip. "Effective Board Building: Creating and Maintaining a High-Performing and High-Satisfying Governing Board." Leading and Governing Associates, Inc.2006.

Byers, Jacqueline. "What Do County Commissioners Do All Day?" NACo research division: Washington D.C., April 15, 2004. www.naco.org/ContentManagement/ContentDisplay.cfm?ContentID=12026

County Leadership Handbook: National Association of Counties, 2004. Available at on the NACo Web site at: www.naco.org/Template.cfm?Section=Leadership_Development&Template=/TaggedPage/TaggedPageDisplay.cfm&TPLID=5&ContentID=14163 or at the NCACC offices. Contact Todd McGee at (919) 715-7336. A new edition will be made available in 2008.

Ferrell, Joseph. "Handbook for North Carolina County Commissioners." UNC-Institute of Government: 2nd Edition, 1998. www.sogpubs.unc.edu/singlebook.php?id=51

Nalbandian, John. Presentations and Workshops: "High Peforming Council" and "Council- Manager Relations." Powerpoints and presentation notes available online at www.goodlocalgovernment.org.

Plumptre, Tim. "How Good is Our Board?: How Board Evaluations Can Improve Governance." Institute on Governance: Canada. Policy Brief No. 25, February 2006. www.iog.ca/publications/policybrief25.pdf

Putnam, Robert D. "The Prosperous Community: Social Capital and Public Life." The American Prospect No. 13: Spring 1993. epn.org/prospect/13/13putn.html

Upshaw, Vaughn. "Essential Responsibilities of Local Governing Boards." Popular Government, Winter 2006. www.sog.unc.edu/pubs/electronicversions/pg/pgwin06/article2.pdf

"Welcome to Your County" booklet. NCACC, April 2006. www.ncacc.org/documents/yourcountyorderform.pdf

Books

Bryson, John M. and Farnum K. Alston. Creating and Implementing Your Strategic Plan: A Workbook for Public and Nonprofit Organizations. Jossey – Bass: 2004, 2nd Ed.**

Carver, John. Boards That Make a Difference: A New Design for Leadership in Nonprofit and Public Organizations. Jossey-Bass, 1990, 1997, and new 3rd edition, 2006.**

Carver, Miriam and Bill Charney. The Board Member's Playbook: Using Policy Governance to Solve Problems, Make Decisions, and Build a Stronger Board. Jossey-Bass, January 2004.**

Chait, Richard, Barbara Taylor and Thomas Holland. Improving The Performance Of Governing Boards. American Council on Education and the Oryx Press, 1996.

Chrislip, David. The Collaborative Leadership Fieldbook. Jossey – Bass: 2002. **

Creighton, James L. The Public Participation Handbook: Making Better Decisions Through Citizen Involvement. Jossey – Bass, March 2005.**

Crosby, Barbara and John M. Bryson. Leadership for the Common Good: Tackling Public Problems in a Shared Power World . Jossey-Bass: 2nd Edition, March 2005**

Eadie, Doug. Extraordinary Board Leadership: The Seven Keys to High-Impact Governance. Aspen Publishers, 2001.

Emerald, David. The Power of TED: the Empowerment Dynamic.1st Edition: Polaris Publishing: 2006. powerofted.com/main/?option=content&task=view&id=21. Also available at NCACC offices by request.

Greenberg, David. 12 Simple Do-It-Yourself Team Building Games & Icebreakers and How to Conduct Incredibly Productive Meetings. (e-books) www.davidgreenberg.com/bookstore.htm

Heifetz, Ron and Marty Linsky. Leadership on the Line: Staying Alive Through the Dangers of Leading. Harvard Business School Press, 2002.

Parks, Sharon. Leadership Can be Taught: A Bold Approach for a Complex World. Harvard Business School Press, 2005.

Tweeten, Byron. Transformational Boards: A Practical Guide to Engaging Your Board and Embracing Change. Jossey-Bass, February 2002.**

Zajonc, Donna. The Politics of Hope: Reviving the Dream of Democracy. Synergy Books, 2004. www.politicsofhope.com/book-politics.html (Also available at NCACC offices by request)

Board Assessment Tools

Parker, Glenn M. Team Building: What Makes a Good Team Player? Government Version: Team Player Survey, Video, and Workshop Materials. www.rctm.com/Products/teams/6706.htm

Web site: The Journey to Good Governance. Institute on Governance, Canada. www.iog.ca/boardgovernance/index.html (view "assess your governance")

Periodicals and Case Studies

Periodical: Popular Government. UNC-Institute of Government. www.sogpubs.unc.edu/books.php?cat=17

Periodical: Small Community Quarterly. National Center for Small Communities. www.natat.org/ncsc/Pubs/Newsletter/SCQIntro.html

Periodical: The TED Letter (the empowerment dynamic). powerofted.com/main

Weidner, Inc. "Case Studies." www.weidnerinc.com/case_studies.php

**** May be available through Jossey-Bass Inc. Publishing Company, on the Web at www.josseybass.com/WileyCDA/**

Board Leadership and Development
Summary of Findings

The areas of board leadership and development are perhaps the most difficult to define for the purposes of best practices research. Leadership is **always contextual**. One county may define leadership differently than another. Each county may have its own needs in terms of leadership development. A county commissioner from North Carolina may see and like an example of good strategic planning in a California county, but will still need to adapt that practice to suit the context and budget in their county.

If there is one clear best practice to be drawn from my research, it would be **active communication.** From the examples in the previous section, it is clear that communication is key to an effective board. This "active communication," as I term it, takes many forms. It involves constant communication between board members about upcoming issues before meetings; constant interaction with the county manager and staff in order to arm board members with current and up-to-date information; and talking out contentious issues with other board members on an individual level to show empathy and resolve the conflict quickly.

Active communication must be present within meetings as well. The chair must set an agenda that addresses all issues equally and fairly, with each member receiving adequate time for those issues that are important to them. Board members must be treated with respect and allowed to talk in turn. Chairs must be willing to take control of the meeting when a board member or member of the audience gets out of hand. Each element of active communication is not only the responsibility of the chair, but also of every board member. As such, active communication is not only a key element of board leadership, but a necessary element for the basic functioning of any board.

Another key best practice closely related to communication is **creating an information network**. This means that the chair should be in constant contact with all board members between meetings so that no one is surprised by an issue. Also, the board should request updates from the county manager at least once a week. This spread of information can be done fairly easily, for example through a weekly e-mail. However, during times of crisis, board members must be willing and available to accept regular phone calls.

Lastly, the final conclusive best practice from my interviews is **having a clear mission**. Many commissioners I interviewed noted that setting a mission at the beginning of every year helps the board stay focused on important issues and reminds them of what is good for the county. It also helps reduced political in-fighting, since everyone has the same goals and the same boundaries.

Most government officials and associations consider board leadership and development to be a learned skill, garnered through education programs and workshops. This may be true, but in my interviews with various commissioners and experts, board leadership and development also comes from experience in working together. Those experiences will be unique to each board and cannot be taught, categorized or listed as a best practice.

My first recommendation to the NCACC is to **work on the Association's definition of leadership**. Although this may be elusive, getting an outline or "categories" of board leadership is key. This can be done by polling members. What are your needs in terms of board leadership? Do you have conflict problems? Is strategic planning an issue? Do you need advice on how to run meetings? Is there a problem with cohesiveness? All these questions and more will give the Association an idea of the best practices needed in North Carolina.

Another suggestion, inspired by Mary Ann Black, is that the Association may need to turn briefly away from best practices and look more **at defining the problems in board leadership and development**. This could be done by identifying troubled county boards, interviewing county managers and listening to the tapes of county board meetings. This endeavor may require the resources of future interns, as well as consultants who understand team building, psychology, etc.

There are many reading materials on board leadership, communication, etc. that would be excellent resources for commissioners. The sources from Part B of this report, as well as those in the "resource library section," should be distributed to commissioners. This section will need to be updated as more information is published.

Ultimately, the best judge of best practices in board leadership and development are will be the board members themselves. My final suggestion is to **tap the membership as a resource to judge these practices.** There are endless workshops, consultant programs and books that try to capture best practices in board leadership. In order to separate the valuable from the trivial, send commissioners and managers to these workshops and sessions and ask them to judge what best practices they got from it. They will likely choose those practices that address the problems they see in their county. As a result, the NCACC will not only develop a more accurate list of best practices, but it will relate directly to what is needed in this state. As provided in this research report, there are many consultants and programs that are available for this research. I suggest that these consultants and conferences be listed on the NCACC Web site as links, so that interested county boards can attend on their own time. These will need to be periodically updated.

It should be noted that you **may find no definite best practices in leadership**. What works for one county may not work in another. The models and theories given in this report are simply suggestions that must be adapted for each county. It is also clear that board development is just as illusive – boards effectively develop through education, training and experience.

Through education, county commissioners can build skill sets that will not only help them become better leaders, but may help them develop their own creative methods of improving board leadership and development. However, it is interesting to note that many of the most successful statewide training programs for county commissioners do not include a specific track of board development courses. The Institute of Government currently offers courses in board leadership and development, and perhaps one way to make North Carolina a best practices state is to create a county commissioner training program that emphasizes board development rather than treating it as one subject among many. **New commissioner packets** should contain at least some of the information from this report and future best practices research, as well as the **County Leadership Handbook**, produced by NACo every four years (available on the NACo Web site; see *Leadership resource library*).

There are several **best practices** that stand out among successful county commissioners. They are:

- Open communication – Every commissioner receives the same information about every issue, as often as possible.
- Respect – Each commissioner is treated equally and given equal talking time.
- Mission-based planning – County officials see the mission as the big picture and focus on those issues that help them achieve it. Other issues should be secondary.
- Push politics to the side – Create agendas and yearlong plans that everyone can agree on, focus the board on the mission and away from personal agendas.
- Train – Statewide training programs will offer valuable skills, but the most successful commissioners have oriented to departments and trained on issues specific to their county.

The major questions that must be addressed by the NCACC for its strategic goals team tasked with board leadership and development are:

- Can we come up with a clear definition of leadership for county government officials?
- Are the problems experienced by boards too unique to be corrected by best practices?
- Will training our commissioners in leadership, communication and team building solve any of these problems?
- How do you deal with a problem that stems from pure animosity and personality conflicts? Will it forever plague county commissioner boards?

Section C: Best Practices in Continuing Education

I. Statewide Training Programs for New County Commissioners

During the development of a training workshop for the NCACC Annual Conference, Strategic Plan Team No. 2 discussed ways to evaluate and improve upon current county commissioner training programs. It was decided that one of the best ways to improve the current training services was to compare them to what other state programs offer. After researching the program offerings and interviewing the program directors, the three states that stood out as best practice models were:

- Georgia
- Maryland
- Pennsylvania

Georgia

Georgia offered three statewide training programs, one for newly elected commissioners, a voluntary certification level called the **"County Commissioners Training Program,"** and the "**Certified Commissioners Advanced Program**," which serves as an additional continuing education option for those who have already completed the training program. The Association of County Commissioners of Georgia partners with the Institute of Government at the University of Georgia, which structures the curriculum and courses.

The notable **best practices** in the ACCG programs are:

1) Training courses are moved throughout the state (Atlanta, Savannah, Athens, Macon, etc.) for commissioners' convenience.
2) The ACCG has a training advisory committee, made up of commissioners, ACCG staff and IOG representatives that meets twice a year to discuss changes to the curriculum.
3) The effect of the statutory requirement is that all commissioners are exposed to the value of education and are more inclined to sign up for the program.

Georgia is currently considering changes to its program, including a requested third level of training, and a new format of courses that would include separate classes geared toward both large and small counties. A third level of courses may serve to be too expensive and overwhelming for the ACCG. Courses for large and small counties, while good in theory, may also cause a rift and lack of understand between counties, creating less learning unity throughout the state.

Maryland

The Maryland Association of Counties has collaborated with the Maryland Municipal League and the University of Maryland Institute for Governmental Service (IGS) to create the **"Academy for Excellence in Local Government."** The program is voluntary and open to all government officials. Completion of the academy results in becoming a "certified county commissioner."

The notable **best practices** by Maryland and MACo are:

1) IGS at the Maryland acts as the administrator of the program, handling the registration, transcripts and general paperwork. All the fees from the program go to the IGS. The role of the county association is simply to create a governing board and decide on new courses and speakers. This allows the association to spend more time structuring courses to meet the needs of county officials.
2) The core courses in the curriculum are primarily taught by the same instructors from year to year, saving in hiring costs and search time. For example, "Consensus and Team Building" is taught each year by the head of the local mediation center each time it is offered.
3) Offering courses as part of the regularly scheduled conferences greatly helps in increasing conference attendance. As an added benefit, many incumbents have used their Academy certification as a selling point for re-election.

Pennsylvania

Also dubbed **"The Academy for Excellence in Local Government,"** this program is open to all county officials and most courses are taught at the offices of the County Commissioners Association of Pennsylvania.

The notable best practices from Pennsylvania are:

1) The program rotates between paid and unpaid speakers. The list includes lawyers, past county commissioners, associate firms and vendors, and staff.
2) The Academy is a voluntary program that operates on a four-year cycle of courses. Interested students may join at any time. As an incentive to join the Academy, members are allowed to pay a flat fee of $700 for all courses in the program. Non-Academy members may still take the courses, but must pay individually to attend each. Non-members cannot receive credit or certification until they have jointed the program.
3) A partnership with the state university – in this case Penn State University Political Science and Public Policy department professors – can be tapped as speakers and course instructors.

One major downside to this program is that most of the courses take place at the CCAP offices. According to the other programs mentioned, offering courses at annual conferences and events boosts attendance greatly.

II. Additional Developments and Potential Best Practices

South Carolina currently offers **teleconferencing** courses for planning and zoning and is considering courses by **DVD**.

- Does this take away the key "peer learning" value of a classroom?
- With no clear way to verify distance participation, will testing be needed?

New Mexico is working to create **online courses** using an authentication program to verify identities.

- Does this solve the testing problem?
- Will it be too expensive to create?

****For the full report on various statewide training programs in continuing education and all contact information, *see Appendix D.*

III. Board Training from Other Associations and Groups

North Carolina School Boards Association

Not everyone has time to go to a conference, especially the busy members of a school board. The N.C. School Boards Association (NCSBA) decided that it would allow the option of home learning to its members. As part of its Academy for School Boardsmanship, the NCSBA joined a **consortium of online learning.** The consortium was set up by the National School Boards Association, which provides the platform. State school board associations can then log on and share different online learning programs that have been developed. Each organization shares the costs and revenues of the consortium and must do any adaptation of the program itself.

The online learning can be reached through the NCSBA Web site, and is password protected. All online courses receive three hours of credit. The program director simply logs on to see if you have completed the course, and you receive credit. Some online courses have tests at the end, but none of them are counted toward a grade. They are simply to show the board member how well they have done. Examples of online courses administered by the NCSBA include "parliamentary procedure" and "school law and communication."

There are downsides to online courses. Many school board members are older and do not wish to participate in a computerized learning program. As board turnover continues however, younger generations may be more receptive to the program. Another downside is cost. Even though board members pay to take the online courses, setting up, adapting and administering an online program takes money, personnel and time.

South Carolina School Boards Association

SCSBA's **Boardmanship Institute** offers training for school board members both at statewide conferences and at onsite workshops customized for a particular district. State law mandates that all new board members attend an orientation. SCSBA provides this orientation in conjunction with its annual convention. Those unable to attend may fulfill the requirement by watching the orientation tapes available from the SCSBA office.

The one of the unique elements of this training program – its best practice – is the **onsite customized workshops**. Two workshops, the Basics of Boardsmanship and the Master Board Institute, emphasize topics such as board relations, communication, policy and administration, and team building. However, instead of offering generic courses, the SCSBA encourages school boards to ask for these workshops to focus on specific topics. A course may cover a lot of information, but for a board with three new members, the focus will be on team building and communication. These workshops may not cover every area of school board training thoroughly, but they are a good option when a board is experiencing a particular area of difficulty.

For more information, visit www.scsba.org/training.htm.

Contact Gwen Hampton at ghampton@scsba.org.

Tennessee School Boards Association

Most county and school board associations do not test participants once they have completed their training. So how do you know how well you have done? The Tennessee School Board Association came up with an **assessment CD** that is sent to a member's home once they have completed their new board member orientation and the four core training models. This tool, created in-house, identifies a member's areas of expertise and provides suggestions for obtaining additional information in areas that may be weak. A score profile with explanations is mailed to their home once the assessment has been completed. A member can go back and take additional courses to strengthen these weak areas, but the resources suggested by the assessment CD can also be sought out online, in libraries, or at other events subject to the individual's discretion.

For more information, visit www.tsba.net.

Contact Lisa Jolly at ljolly@tsba.net.

Stafford County, Va.

Stafford County realizes that leadership development should be important for the county government at any level. Stafford County wanted to create a leadership program for county employees, but decided that the program could be molded into an opportunity to create bridges between counties and their schools. Thus the **School and Government Leadership Institute** was born.

The program consists of one day-long course each month for eight months. It is run in by the University of Virginia Center for Executive Development, which provides the speakers, activities and class exercises. Sample topics include values-based leadership, effective meetings and learning to be a learning organization. The goal in each session is to have some type of mixed group interaction to share ideas and resources between the school board employees and the county government employees.

Students of the Institute must be nominated by a department head or county official. The cost is $750 for the year per student and must be paid by county or school board. So far, feedback has been wonderful on the program. Communication lines between the county and school board have strengthened, and in the midst of budget cuts for training, the Leadership Institute was one of the few programs spared based on the recommendations of employees who had participated.

Although this is an example of employee-level training, this idea is something for county commissioners to consider. Perhaps the NCACC and the School Board Association can work together in their training programs to create joint learning environments or joint conferences to facilitate the sharing of knowledge, resources and opening the door to better communication between these groups.

For more information, visit www.naco.org/Template.cfm?Section=Achievement_Awards&Template=/cffiles/awards/program.cfm&SEARCHID=2005pers32

Contact Susan LaFollette at slafollette@co.stafford.va.us.

National Federation of Community Broadcasters

For most county associations, board training is all about specific workshops and courses that are delivered in bulk to county commissioners. For the NFCB, **board training is all about a customized, introspective experience**. Each training is customized and designed through discussion with the manager and/or board president or designated person.

Instead of focusing on teaching a new skill or idea, the sessions **focus on evaluation of the board**. The first four activities include: 1) Review of responsibilities and structure of the board and of the staff and the appropriate role of each group; 2) Evaluation of how well the board is currently functioning; 3) Discussion of current challenges facing community radio stations; and 4) Interviews with board and/or staff to uncover issues at the station, both good and bad.

The NFCB uses forms and interview questions adapted from CompassPoint consulting group, which it partnered with in the past. Once the evaluation has been completed and discussed, the NFCB focuses its training on planning and goal setting with the evaluation in mind. Training facilitators try to help with goal setting for the next year by working through a step-by-step process with the board members.

For more information, visit www.nfcb.org/services/boardtrainings.jsp.

Contact the main office at (510) 451-8200.

Section C: Continuing Education for Commissioners
Summary of Findings

It is clear that there are many choices and formats for a continuing education program. It will be up to county commissioners to decide what program they want to attend and what courses will benefit them.

My questions for county commissioners (included in the full report: Appendix D) would be:

- What is the perceived value of the Institute of Government to county governments and what changes must be made?
- Is there a need for a higher level of classes beyond the orientation level?
- Does North Carolina need a certification program? Will it act as an incentive to officials or have no effect?
- Can the programs be more accessible through distance learning, or will the loss of a peer learning environment make the program less effective?

As evidenced by the preceding section on future developments, many states are considering new means – through technology – of reaching out to commissioners. North Carolina will need to carefully way the pros and cons of new teaching formats.

It may be necessary **to create customized onsite workshops** – such as the ones conducted by the South Carolina School Boards Association – in order to make the workshops more relevant. The question is: How easy is it to customize workshops for boards, and are they effective? Does the nature of changing government and the need for awareness at all levels make it harder to customize a commissioner's education?

One thing is clear: none of these associations **try to tackle continuing education alone**. Most county associations partner with a university or work with a consultant to design their program. Even those who have an internal program have used tools or formatting from a consultant group. The problem for county government is that most consultant groups specializing in board training focus their programs for nonprofits. If the NCACC or an individual county had the resources to hire a consultant, it would be unlikely that the consultant would have experience with government boards.

The focus of education in county government is constantly changing. From my research and interviews, it is clear that several changes to county government education must be explored.

1) **Negotiation**: The area of negotiation education is growing among Master of Public Administration programs and has presented graduates with valuable team skills. As the need for inter-team and external collaboration (contracts, intergovernmental relations) grows, understanding negotiation styles and strategies will be key for an effective county official.
2) **Mixed-group education**: As evidenced by Stafford County's Leadership Institute, elected officials will have varying skills and ideas to bring to the table. Education programs must include county officials, managers, clerks and even school board members in order to educate officials by providing a wide range of perspectives on county issues.
3) **Stress and the speed of information**: Education programs should not just be about leadership. Addressing personal concerns such as stress and time management are much more relevant in today's technology-driven world. These

"soft" subjects can make the difference between an effective official and a miserable board or staff member. Also, with the mounting demand for information from all levels of government, officials will need strategies for more effective communication, more diverse methods of communication, and dealing with increased public scrutiny.

Education is not necessarily the answer to all of a board's problems. Is the problem a deficiency of knowledge or skill among the board, or is it a deficiency of execution? **Board members at the very least must know:**

- the roles and responsibilities of county boards, and the roles and responsibilities of individual board members
- Structuring the work of the board (e.g., committees) in a way that will optimize effectiveness within their current capabilities
- Developing the appropriate working relationship with professional staff (if one exists)
- Understanding and accepting their role and its restrictions under the law

All the training in the world will not make a board effective if the ability to implement is not there. Here, areas such as poor leadership, lack of consensus, poor communication and lack of resolution procedures should be examined.

You may **need to perform a board evaluation** or bring in an outside consultant to perform an assessment. Whatever the case may be, don't see training as a way to solve all your problems, but rather as a tool to help you recognize them.

The NCACC's part in continuing education is more as the role of a facilitator. A workshop at the 2006 NCACC Annual Conference titled "Are you ready to be certified?" is a perfect starting point. It a great opportunity to explore a more structured continuing education program in county government, one that not only addresses basic information for new commissioners, but creates a peer learning environment that helps seasoned commissioners address upcoming issues in their county. Courses in negotiation, contract law, time management and team building are always relevant at any stage of a public official's career.

Lastly, as recommended to Strategic Goals Team No. 2, NACo serves as an excellent resource for new commissioners. Every four years, NACo publishes "The County Leadership Handbook." This document includes sections on board leadership, media relations, Information Technology and understanding the budget. I recommend that this be part of all new commissioner packets and distributed to each county as new handbooks are published.

Appendix A

Questions to Ask When a Reporter Calls

Reporter's name:____________________ (spelling verified). Call back #_____________

News organization: ____

What is your story about?____

____

What/who brought this topic to your attention? ___________________________________

____

Who else do you wish to speak with from at the county offices?______________________

____

May I inform them of why you are calling? ______________________________________

What are some of the questions that you might ask?________________________________

____

How long will the interview take?____

When is your deadline? ____

Who have you already spoken with about this story?_______________________________

____

Who else do you plan to talk to?____

____

When do you think the story might run?____

May we provide you with some background information on this topic?_______________

How should I send that over?_____e-mail _______fax _____ courier ____ mail

Information sent: ____

Other notes: ____

____

Media & Reporter Contact Information

<u>Organization</u>

Media name:____________________________ Web site: ___________________________

Physical address: ________________________________ P.O. Box____________________

City, state, zip:____

Main phone: __________________ Newsroom phone:___________ Fax:_________________

Demographics/audience:____

Geography/coverage area:____

Type: _____Newspaper ____Magazine ____TV____Radio____Internet only ____Newsletter

Circulation: _______________ Parent company: _________________________________

Frequency: ___ Daily ___ Weekly ___Monthly ___Quarterly ___ Annually_____other

Overview: ____

____

____

<u>Reporters</u>

Name: _____________________(spelling verified) Pronounced_________________________

Title: _________________________ Beat/interests__________________________________

Direct phone: ________________________ E-mail: __________________________________

Address (if different from above):____

Preferences:____

Deadlines: ____

Past articles written:

<u>Headline</u>	Date	Topic
________________________________	__________________	_______________________
________________________________	__________________	_______________________
________________________________	__________________	_______________________
________________________________	__________________	_______________________

Crisis Communications Response

Develop key messages or talking points. Responsible: ____________________________

1) ____

____

2) ____

____

3) ____

____

____ Select spokespeople. Responsible: ____

Name: ___________________ Title:__________________________ Phone:________________

Name: ___________________ Title: __________________________ Phone: ________________

____ Review talking points with spokespeople. Responsible: ____________________________

____ Determine external interview sources. Responsible_______________________________

Expert/involved party___________________________ Willing to interview?___________

Community leader ____________________________ Willing to interview?___________

Other: ____ Willing to interview? __________

____ Follow up on unanswered questions Responsible:______________________

____ Assign someone to track incoming calls Responsible: ______________________

____ Write press release and supporting materials Responsible: ______________________

____ Distribute information to the media Responsible: ______________________

____ Set up press briefings Responsible: ______________________

Unanswered questions: ____

____

____ Respond to unanswered questions Responsible: ______________________

<u>After the crisis</u>

____Evaluate your response success Responsible: ______________________

____Update crisis communications plan Responsible: ______________________

Appendix B

<u>The Checklist for Local Governing Boards</u>

1) Understanding its legal authority

___ Do we know what we are legally required to do or restricted from doing on this issue?

    ___ Are there constitutional issues?

    ___ Statutory issues?

    ___ Local policies we must follow?

___ Do we know what we are obligated to do by state or federal law?

___ Do we know what we are prevented from doing by state or federal law?

___ Do we know what we are given the option to do by state or federal law?

___ Do we know if there are other laws or standards that need to be considered?

2) Work with others

___ Have we identified individuals and groups that need to be consulted or buy in before we can act?

___ Are all members of the board informed and prepared to act on this issue?

___ Have we engaged the manager and the organization on this issue?

___ Have we consulted relevant external individuals and groups?

___ Have we identified who will be helped and who will be harmed if we pursue this issue?

___ Are the media informed on the issue and the board's proposed action?

___Are there other units of government that need to be involved (state, municipalities, neighboring counties?)

___ What agreements need to be negotiated internally or externally with key stakeholders to move the issue forward?

3) Set policy

___ What result do we hope to achieve?

___ What policy do we want to enact?

___ How is this issue tied to our strategic plan?

___ Can we address this matter in our regular meetings, or do we need a special meeting?

___ What information do we need to make a good decision?

___ What information will we need to monitor this issue over time?

___ Do we need to hold a public hearing?

___ Does the issue require a public referendum?

4) Allocate resources

___ What resources will be required, and how will we know how well they were used?

___ Do we have the resources to pursue action on our own?

___ What other groups are contributing or might contribute resources to this issue?

___ Have we allocated resources to support our priorities?

___ Do we have a process for monitoring resource use?

5) Be accountable
___ What will success look like, and how will we know if we achieve it?
___ What will we hold ourselves (as a board), our manager and our organization accountable for?
___ How will we assess our own (board) work?
___ How will we assess the manager's and organization's performance?
___ How will we address performance problems for the board, the manager and the organization?
___ How will we recognize performance achievements by the board, the manager and the organization?

Appendix C

Effective Board Building
Creating and Maintaining a High-Performing and High-Satisfying Governing Board

Contents

Phillip Boyle, Ph.D. President, Leading & Governing Associates, Inc.

Governing Relationships in a Democratic Society

Board members enjoy a special kind of relationship, a way of relating to one another that is consistent with and conducive to the democratic process. Aristotle conceived of democracy as nothing less than the political extension of friendship. While political friendship is artificial compared to personal friendship, it can serve to transform disinterested strangers into friends through empathy and shared interests.

John Dewey argued that a fully democratic group respects both the individuality and competence of every member. However, appeals to cohesiveness and congeniality must not be used as means for manipulating members. An honest adversarial relationship is better than a false unity. Healthy governing relationships share the following characteristics:

1. Equally distributed decision making power
2. Inclusive membership
3. Democratic participation and deliberation

- Equal and adequate opportunities to speak
- No withholding of information
- No verbal manipulation of one another
- Ability and willingness to listen

Challenges Facing Boards

To operate as an effective governing body, boards must manage both tasks and relationships. In terms of tasks, boards must decide what they are going to do and how they will do it. In terms of relationships, board members face three critical challenges:

1. Relating to each other personally, as individuals, as fellow citizens.
2. Relating to one another consistent with and conducive to the democratic process by recognizing the competency and legitimacy of each member.
3. Relating to citizens and other public officials in a way that strengthens and supports representative democracy.

Dynamics of Working as a Group

- Communication, trust, honesty, respect, unity, divisiveness, power, control, inclusion and exclusion
- Listening, encouraging discussion, seeking information, exploring alternatives, expressing disagreement, soliciting feedback, seeking consensus, using past experience to improve decisions
- Strengthening trust, reducing stress, getting to know each other better, learning what makes each other tick, what we are passionate about, renewing our relationships with each other, better expressing ourselves, learning who we are as people

Dynamics of Working as a Board

- Philosophical differences about the role of the board and government
- Challenges we face, what we should do, direction, goals, priorities, purpose
- Creating a shared vision, planning for the future more than putting out fires, reducing split votes, accepting and publicly supporting board decisions
- Governing more than campaigning, discovering what we agree on, getting a sense of where we want to go, who we represent, and what we expect from each other and from our administrators

The Board's Governing Role

1. To make democracy, or "rule by the people," work.
2. To represent the entire community.
3. To recognize that the community's interests may be broader than those of any one board member.

The Board's Governing Responsibilities

1. To help create the "good life" for everyone by building the capacity of the community to solve public problems.
2. To forge partnerships with economic, community, and civic organizations.
3. To develop the potential of every citizen to participate in and contribute to the economic and civic life of the community.

The Board's Governing Relationships

1. Model democracy by practicing inclusion, active listening, and balancing speaking and listening rights and responsibilities.

2. Model respect for individuality, non-tyranny of the majority, recognize mutuality between members, affirm competence, and establish explicit norms for congeniality and civility.
3. Recognize that agenda setting, like informing, articulating, persuading, reframing, voting, and dissenting, is a form of democratic deliberation, and must include all members.

Common "Mistakes" Board Members Make

1. Lack of patience
2. Poor behavior, "acting out"
3. Challenging the board after a vote
4. Acting like the "Lone Ranger"
5. Not seeing the forest for the trees
6. Dropping bombs at board meetings
7. Personal or hidden agendas, being secretive vs. confidential
8. Getting stuck in the same alliances and coalitions regardless of the issue
9. Confusing means and ends, playing winning vs. losing, substituting voting for building consensus
10. Forgetting that being on the board is not a "one-night stand"
11. Lack of ground rules
12. The elected expert
13. Disregarding expert advice
14. Board-manager and policy making - administration tensions
15. Disengaged from community
16. Ways of speaking to members that are hurtful and close down communication, e.g., lecturing, chastising, threatening, bullying, disrespectful comments
17. Forgetting that "the world must be kept safe for differences."
18. Short-term political considerations, pandering to special interests
19. Egos, fear of change, giving up control, fear of the unknown
20. Competition, turf, fairness, equity, zero-sum games, winners and losers
21. Numerical "rigor mortis" - "we're a 3-2 board"
22. Suspicion, mistrust, distrust, lack of trust, dropping bombs, springing surprises, looking to embarrass colleagues or staff, playing "Gotcha"
23. Never changing positions, over-reliance on compromise
24. Too much talking, not enough listening
25. Too little leadership, board development, and skills building

Consequences of Board Mistakes

1. Unsatisfying communication
2. Diminished trust, respect, acceptance, tolerance
3. Increased stress, mistrust, frustration, anger, lashing out, fear
4. Loss of community respect, difficult to get things accomplished, sucks the energy out of us, makes us unproductive

5. Shows up in poor behavior, frustrating meetings, poor image in the eyes of the public, reduces level of enjoyment and satisfaction from being on the board
6. Low energy, diminished enjoyment and satisfaction
7. Decisions with poor shelf life
8. Negative impact on the public
9. Lose sight of purpose
10. Individuals act as the board
11. Disagreements become personal
12. Less tolerance for those who disagree
13. Split votes on important issues
14. Members stop listening, minority viewpoints are ignored
15. Members see winners and losers, us and them

Governing Lessons Identified by Experienced Board Members

1. Learning to acknowledge publicly that you have no power or authority as an individual board member, and that only the board as a whole can take action
2. Determining what your role is on the board and how to best accomplish it
3. That no matter what you know when you come on the board, you still have a lot to learn
4. Understanding the differences between the board's job and the administrator's job
5. That you must work to represent all of the residents in your community, not just special interest groups or those who voted for you
6. That change comes slowly
7. That you must think deeply about issues and sometimes accept a reality contrary to your own beliefs
8. Being able to hold the minority viewpoint when voting on an issue, but openly supporting the majority after the vote
9. Learning how to respond constructively to the concerns and complaints of citizens, constituents, businesses, staff, community groups, your spouse, your children, and your friends without creating a bigger problem for the folks whose job it is to try to solve the problem
10. That you can't solve everyone's problems by yourself

Common Board Member Expectations

1. Communicate honestly about what we expect from each other
2. Become more inclusive, more of a team - more equality between members
3. Learn more about what works well on boards, what doesn't
4. Less carryover of campaign behavior to board
5. Be honest without being hurtful
6. Develop and agree to useful ground rules/operating procedures
7. Better appreciate and use conflict and differences
8. Learn more about our individual strengths and weaknesses
9. Develop greater respect and better working relationships
10. Difference is a strength

11 .We need to be able to disagree but still work together
12. Disagreement doesn’t mean you’re against the board
13. Good relationships are critical to getting things done
14. To be listened to, to feel heard
15. Have more fun

Ground Rules for Effective Boards

1. Share all relevant information
2. Focus on interests, not positions
3. Be specific - use examples
4. Explain your statements and actions
5. Keep the discussion focused and to the point
6. Don’t take cheap shots or otherwise distract the group
7. Participate as you are comfortable/capable
8. Make decisions by consensus
9. Disagree with any member, but disagree openly
10. Invite questions, comments, and feedback

Core Characteristics of High-Performing and High-Satisfying Boards

1. Mutual Responsibility- all members feel responsible for the board’s results; meetings are managed efficiently and effectively, focusing on results and shared responsibility for process and outcomes
2. Participative Leadership - the board removes barriers to full and effective participation by all members, and members participate equally to the best of their abilities in planning and making decisions
3. Shared Purpose - members are aligned as to why the board exists and its purpose; conflict and differences are used creatively to develop alternative solutions and inform decisions
4. High Communication - a climate of trust, honesty, openness, and mutual respect exists on the board
5. Future Forward- the board is optimistic and opportunistic, it does not allow personal and environmental obstacles from keeping it from identifying and acting on opportunities, and members see change as an opportunity for personal growth and the growth of their community

Best Practices and Effective Strategies for Leading the Board

1. State specific objectives at the start
2. Make sure everyone knows they will have a chance to speak
3. Begin with questions related to the task
4. Check to see if you are on task
5. Don’t reinforce or explore off-task remarks
6. Use close-ended questions to address off-task remarks, then tactfully ask the person who has made an off-task remark to relate their comment to the task at hand

7. Use open-ended questions to address on-task remarks, turn feedback into open-ended questions
8. Write information relevant to the task on an easel
9. Ask how to improve the next meeting, and incorporate one new idea
10. Summarize and reflect ideas
11. Model desired behaviors
12. Use humor, empathy, facts to manage contentious issues
13. Engage all board members
14. Restrict dominating individuals
15. Encourage honest search for consensus

Questions Boards Should Ask Themselves

1. Are we clear about our purpose?
2. How satisfied are we with the quality of our communication?
3. What's our level of trust?
4. Do disagreements become personal?
5. Is there less tolerance for those who disagree?
6. Do we agree on our goals and priorities?
7. Do we ignore minority viewpoints?
8. Do we play "win-lose" and "us and them?"
9. Do we share responsibility for leading our board?
10. Have we "bought-in" to the idea of the board?
11. Are we treating each other fairly?
12. Do individual members sometimes act as the board?
13. Have some members stopped listening to other members?
14. Do policy disagreements carry over to relationships?
15. Are we discouraging the manager?

Tips for Dealing with Difficult Meetings and Conversations

1. Ask open-ended questions to help them identify possible solutions to their problem, e.g., ask them how they would like the discussion to end; what results do they want to achieve - this will often reduce their frustration and feelings of helplessness.
2. Ask for specifics, and take notes during difficult conversations. You can shift a confrontation or personal attack to a more cooperative dialogue simply by asking an angry person to give details about why he or she is so upset. This will often calm the person, and may yield useful information.
3. One of the most effective ways to communicate is in writing. It allows you to present your points in an orderly fashion, which is not always possible during oral communication. Also, ask for complaints in writing, and assign the person fact-finding tasks.
4. Turn "us and them" into "we." Highlight the similarities between you and the other person. Conflict can be turned into cooperation when differences are downplayed. Use partnership words such as "we" and phrases like "Let's gather the information," or "Would you please help me understand the exact details?" Help them identify possible

solutions to their problem - this will often reduce their frustration and feelings of helplessness.

5. Listen attentively. They may just need to blow off steam, which could provide information that's important to you. Acknowledge. You can often de-escalate an angry tirade simply by acknowledging all or even some part of it, e.g., "You could be right about that, but we need to hear from others at today's meeting."
6. Restate - rephrase the person's problem to make sure you understand it.
7. Reflect - offer an empathetic response that verifies the person's real feeling, such as, "You seem to be very angry."
8. Reframe - ask them what is going on, what they were thinking, why they did what they did. This can help a person feel heard, listened to, understood and fairly treated. We usually react not to what somebody does, but to our interpretation of why they did it. The fact is that people's behavior is mostly about them, not you. It's an important perspective to keep in mind.
9. Establish realistic expectations. We often feel angry when we are frustrated - that is, when we want something and think someone or something is unfairly preventing us from getting it. You can minimize the sense of disappointment and resulting anger by making certain that others have realistic expectations. Help them understand that their frustration isn't the result of unfair or arbitrary action.
10. Use peer pressure. People are more likely to behave badly when they think they're anonymous or won't be held accountable. Make it easier to hold them responsible for their own actions. It may seem silly when everyone knows each other, but using name tags in a group setting, or having speakers introduce themselves by name before speaking can change the demeanor of the meeting. Remind folks that angry tirades make many of their colleagues feel uncomfortable and can interfere with listening and understanding what's happening.

Creating and Maintaining High-Performing and High-Satisfying Boards

1. Be willing to succeed or fail as a together. Create a "WAITT" attitude – "We're all in this together." Create a board that is aligned on purpose – it has a sense of common purpose about why the board exists. The critical point comes when members commit to do things as a board and live with the results – good or bad! This sense of cohesiveness acts as a "social glue" that holds the board together when things get tough.
2. Be willing to use and accept peer pressure to direct the behavior and performance of members – peer pressure will be your most powerful tool when members feel connected, and feel that their success is tied to the board's success.
3. Practice high communication to create a climate of trust and open, honest communication. Recognize that relationships within the board are mutually dependent. When members trust each other, they perceive each other as capable, dependable, and as acting with integrity. Members act with the board's interest in mind at all times.
4. Discuss expectations, both one-to-one and as a board. Conflict often arises from unmet or unrealistic expectations, and produces hurt, betrayal, and anger. Misplaced hurt and anger manifest themselves in behavior detrimental to the success and satisfaction of the board. Make sure expectations are realistic, and make all expectations explicit! Then

make sure to find a way to meet individual member's expectations and apply their talents to the board as a whole.

5. Pay attention to how you do things as well as what you do. It pays to monitor your processes (communication, meetings, decision making, etc.) because when you make them more effective, you increase the board's effectiveness. Set aside formal time to monitor relationships, processes, and outcomes. Create a board that is focused on task-one that keeps meetings and activities focused on results.
6. Think long-term. This investment won't produce quick fixes or short-term results. But it will strengthen the board and community over the long-term. Members should assume that they will be living with the outcomes of behaviors and decisions a long time, and the board should work to build norms that benefit members over the long haul.
7. Self-managing means "self-correcting" – most important problems and challenges are open-ended, meaning that a perfect decision or solution is impossible. Sometimes members and the board must take their "best shot" – then solicit feedback from everyone affected. High-performing boards do make mistakes – but they correct them. They practice continuous improvement and lifelong learning.
8. Practice leveling – this is the open, frank discussion of problems, issues, and concerns. Members are willing to speak up about problems and willing to listen to other members' perceptions of the problem. This is the core of trust. People make themselves vulnerable when they speak out about what they perceive or how they feel – trust is created when others accept these feeling and perceptions as real and important to the member who expresses them.
9. Focus on problems – not people. Don't point fingers! Ask "what" is the problem, not "who" is the problem? Focusing on the who creates defensiveness and mistrust. To fix problems, separate them from personalities. Make the problem belong to the board, not to an individual. Focus on the future, not the past. High-performing boards are future focused - they see problems and change as opportunities for growth and improvement. High-performing boards also deal with problems right away, and don't let them fester or linger. They practice rapid response - identifying and acting on opportunities.
10. Create a board contract - a living document that outlines members' agreements about roles, responsibilities, and expectations. Your contract should address at least four key areas: board management (e.g., setting up meetings, developing agendas, etc.); managing boundaries (procedures and processes for handling problems, issues, and responsibilities); information access (who has what, who gets what, who should share what with whom, etc.); and mutual support (adopting ground rules, agreeing to abide by them, monitoring board performance, self-evaluation, etc.). Create a sense of shared responsibility – an environment in which all members feel responsible for the board's performance and success.

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Appendix D

Best Practices

Education and Training Programs for New County Commissioners

GEORGIA

ACCG County Commissioners Training Program – This program is run under the partnership of the Association of County Commissioners of Georgia and the Carl Vinson Institute of Government at the University of Georgia. It is designed to enhance the skills of elected county officials. Each of the courses in the program is offered at least once every other year. Courses can be offered as part of ACCG events or as stand-alone sessions. Five courses are required for completion, a total of 48 hours of instruction. Once completed, the commissioners receive a certificate of recognition. There is no testing done in the program.

According to Carol Baker, meeting planner and special events manager for the ACCG, the Association County Commissioners acts as the manager and administrator of the program. The Institute of Government at UGa creates the content and structures the courses for the program. Many of the speakers are professors from the IOG or local county officials. Most courses are day-long sessions. One session is available with each ACCG conference, but other stand-alone sessions are offered throughout the year.

The ACCG program has been well received in Georgia. According to current numbers, 90 percent to 95 percent of commissioners participate in the training program (about 825 participants). The program is also open to all county staff members who wish to participate. To date, 75 to 100 administrators have completed the program, as well as 175 county clerks.

Three notable best practices of the ACCG are:

1. Training courses are moved throughout the state (Atlanta, Savannah, Athens, Macon, etc).
2. The ACCG has a training advisory committee, made up of commissioners, ACCG staff and IOG representatives that meets twice a year to discuss changes to the curriculum.
3. The effect of the statutory requirement is that all commissioners are exposed to the value of education and are more inclined to sign up for the program.

ACCG County Commissioners Training Program is *optional*.

Certified Commissioners Advanced Program – The CCAP is designed for commissioners who have attended the County Commissioners Training Program and are already certified. Successful completion requires:

- Seven programs or courses adding up to a minimum of 48 hours of training
- Participation on the two-day advanced leadership institute
- Completion of the summary project report

Approximately 50 percent of those who have completed the Level 1 training program also participate in the CCAP.

In recent months, there has been new demand from county commissioners in Georgia for a third level of training, but it has yet to be established. This demand is a testament to the success and usefulness of Georgia's training program.

Other surveys have shown that commissioners want courses designed specifically for large and small counties. The counter argument given is that all counties need to be taught the same skill set and kept aware of issues in facing other counties. Georgia is still considering whether or not to create these new courses.

The Certified Commissioners Advanced Program is *optional.*

Newly Elected Commissioners Conference – Sponsored by the ACCG and the Carl Vinson Institute of Government, this conference is provided under Georgia State Law, which requires newly elected county officials to attend 18 hours of training before assuming office in January. It is sponsored during election years only. The three-and-a-half day program is a separate event from the training program and other ACCG conferences. However, attendees do receive six hours of credit toward the County Commissioners Training Program if they choose to register later.

The Newly Elected Commissioners Conference is *required*.

For more information, visit the Carl Vinson Institute of Government online at www.cviog.uga.edu/training/local/index.php.

Contacts:

- Carol Baker, ACCG, 50 Hurt Plaza-Suite 1000, Atlanta, GA 3030;, Phone: (404) 522-5022 or (800) 858-2224, or cbaker@accg.org.
- Gordon Maner or Kitty Shollenberger, Governmental Training, Education and Development Division, Carl Vinson Institute of Government, 201 N. Milledge Ave., The University of Georgia, Athens, GA 30602-5482; Phone: (404) 542-2736.

MARYLAND

Academy for Excellence in Local Governance – This program is a collaborative effort between the Maryland Association of Counties (MACo), the Maryland Municipal League, the Local Government Insurance Trust, and the University of Maryland's Institute for Governmental Service (IGS). The academy is a voluntary program open to all local government officials. Newly elected officials are encouraged, but not required to participate. Individuals may enroll in the certificate program, or take selected courses of their choosing. To be certified, participants must complete all of the core and elective requirements in either the municipal or county track.

Most classes coincide with the association's summer and winter conferences to make it easier to fit into the officials' schedules. The classes are usually one to two hours in length. The Academy does offer a few stand alone seminars, but these must be cleared by the IGS for credit.

Maryland has approximately 147 county officials, most of which participate in the program. Roughly 50 percent of participants are non-elected county officials who either are aspiring candidates, or just wish to improve their knowledge of county government. Overall, the Academy of Excellence has been well received by county commissioners. According to feedback from participants, the core courses seem to offer the most useful information. Veteran county commissioners have also participated very readily and noted that the courses are highly affective in building new skill sets.

Notable best practices by Maryland are:

1. IGS at the University of Maryland acts as the administrator of the program, handling the registration, transcripts and general paperwork. All the fees from the program go to the IGS. The role of the county association is to create a governing board and decide on new courses and speakers.
2. The core courses in the curriculum are primarily taught by the same people from year to year. For example, “Consensus and Team Building” is taught each year by the head of the local mediation center each time it is offered.
3. Offering courses as part of the regularly scheduled conferences greatly helped in increasing conference attendance. As an added benefit, many incumbents have used their Academy certification as a selling point for re-election.

Program requirements are as follows:

- The majority of participants register in their first year of office or employment
- Participants must complete 10 core units plus four elective units
- On average, each certified participant must have completed between 25 and 40 hours of training
- Participants are expected to complete requirements within two or three years, but exceptions can be made for personal situations and elections

The Academy for Excellence in Local Governance is *optional*.

For further information, visit the Maryland Association of Counties at www.mdcounties.org/academy/default.cfm.

Contacts:

- Ellen Clarke at MACo at (301) 261-1140, or eclarke@mdcounties.org.
- Jackie Adams at University of Maryland at (301) 403-4610, or jadams@umd.edu.

PENNSYLVANIA

Academy for Excellence in County Government – This is a certificate training program for county commissioners, chief clerks, administrators, solicitors and their counterparts in home rule counties offered by the County Commissioners Association of Pennsylvania. To receive the Academy certificate, participants have to complete the required courses (eight total) plus 18 credits via elective courses. Required courses range from three to six hours of instruction and generally are offered at the CCAP offices. Elective courses are usually scheduled in conjunction with conferences or events.

Participants who have registered with the Academy and completed the required and elective courses will receive a certificate and be recognized at the annual CCAP conference.

Feedback on the program has been positive. In response to requests from past graduates, the CCAP has created an Advanced Academy Certification program requiring additional course work.

Notable best practices from Pennsylvania:

- The program rotates its speakers between paid and unpaid speakers. The list includes lawyers, past county commissioners, associate firms and vendors, and staff.
- The Academy is a voluntary program that operates on a four-year cycle of courses. Interested students may join at any time. As an incentive to join the academy, members are allowed to pay a flat fee of $700 for all courses in the program. Non-academy members may still take the courses, but must pay individually to attend and cannot receive credit or certification until they have jointed the program.
- Through a partnership with Penn State University, professors from the Political Science and Public Policy departments can be tapped as speakers and course instructors.

The Academy for Excellence in County Government is *optional*.
For further information, visit the County Commissioners Association of Pennsylvania at www.pacounties.org/commissioners/lib/commissioners/academybroch_march2004.pdf.
Contacts:
Mandi Hollenbaugh, director of member and vendor relations, CCAP, at (717) 526-1010, extension 3339, or mhollenbaugh@pacounties.org.

TEXAS

The majority of county officials in Texas are required to obtain continuing education on an annual basis. According to Sec. 81.0025 of the e-Local Government Code, Texas requires county commissioners to have 16 hours of training every 12 months. They may carry forward up to eight hours.

Sponsored educational programs can be created by county officials, professors at local universities, and members of other associations, as long as they are approved by the Commissioners' Education Committee of the Judges and Commissioners Association. Programs must also be accredited by an institution of higher learning. Once approved, these programs are made available through annual, regional and sub-regional conferences. The course sponsor must keep track of who attends and submit it to Jim Allison, general counsel for the County Judges and Commissioners Association.

Some of the most notable approved sponsor programs include:

Texas Leadership Institute – The Institute's primary focus is to promote sustainability and economic expansion through education of local leaders in planning and economic development. Participants include elected officials, volunteers, chambers of commerce, community and economic developers, convention and visitor bureau personnel, health professionals, and school administrators.
www.lcra.org/develop/community/tli

LBJ School for Public Affairs – A variety of professional development programs have been developed by the school to serve the development needs of elected and appointed officials in government. These programs include conferences for state legislators as well as programs for city and county officials. Major program categories include the Governor's Center for Management Development and the Seminar for Newly Elected County Judges and County Commissioners.
www.utexas.edu/lbj/profdev/candt/index.php

The V.G. Young Institute of County Government (Institute) is part of Texas Cooperative Extension and The Texas A&M University System. The Institute annually offers continuing education conferences and seminars for county judges and commissioners, county treasurers, county and district clerks, and county tax assessor-collectors. vgyi.tamu.edu

Advanced Curriculum – This is an optional educational program sponsored by the County Judges and Commissioners Association of Texas. Advanced Curriculum courses are offered by the V.G. Young Institute of County Government, the University of Texas LBJ School of Public Affairs and at statewide and regional county judges and commissioners meetings. The program requires 64 hours and results in a certificate upon completion. Many of the courses in this program count as part of the mandatory yearly training for all commissioners.

The advanced curriculum program is *optional.*

For further information, visit the *Texas Association of Counties Education Center* at www.county.org/education.

Contacts:

- Mary Manning, Office of Jim Allen, General Counsel of County Judges and Commissioners Association, at (512) 482-0701, or (800) 733-0699.

SOUTH CAROLINA

Institute of Government for County Officials – This program, created by the South Carolina Association of Counties in cooperation with the Governmental Research and Service Unit of the Institute for Public Service and Policy Research at the University of South Carolina, and the Strom Thurmond Institute of Government and Public Affairs at Clemson University, offers the Institute of Government for County Officials. Each year, a minimum of 16 courses are offered. Courses are offered prior to the Association's mid-year conference, annual conference, and fall meeting of the County Council Coalition.

The Institute consists of three levels. Level 1 requires 27 contact hours and courses are offered three times per year. Level 2 is open to all graduates of Level 1 or those within nine hours of graduating. Both Level 1 and Level 2 graduates receive certificates. Level 3 is an advanced level open to Level 1 and Level 2 graduates. Only two courses are offered each year. Level 3 is merely a means of continuing the training of county officials and increasing their knowledge of county issues.

As explained by the SCAC, this program is open to all county officials, including county managers and support staff. Studies show that almost all county commissioners and most managers and clerks participate in the program. The cost for courses is charged on a course-by-course basis, normally costing between $45 and $60.

Most courses are taught in a three-hour block in conjunction with one of SCAC's conferences. Currently, SCAC is offering teleconferencing courses for its planning and zoning officials. There has been no move to offer teleconferencing or video courses for county commissioners because this would likely involve testing to verify attendance.

The Institute of Government is *optional.*

SC Association of County Elected Officials Leadership Academy – The Leadership Academy is designed specifically to meet the professional management and leadership development needs of the South Carolina Association of County Elected Officials (SCACEE) membership. The Academy is conducted by the University of South Carolina's Institute for Public Service and Policy Research (IPSPR) for SCACEE. The curriculum includes 12 two-and-a-half hour courses for a total of 30 hours of instruction. Participants who complete all 30 hours of instruction receive a certificate of completion.

This academy is meant to complement other training for county officials, such as the IOG for county officials. The courses in this program focus on planning, managing time and stress, ethics, and leadership.

The Leadership Academy is *optional.*

For further information, visit the South Carolina Association of Counties at www.sccounties.org/education/IOG-homepage.htm.

Contacts:

- Kathy Williams, SCAC Assistant Director, Administration, (803) 252-7255 or kathy@scac.state.sc.us.
- Lisa Maseng, Special Projects Coordinator, (803) 252-7255 or lisa@scac.state.sc.us.
- Bill Tomes, Senior Public Service Associate, USC Governmental Research and Service,
- (803) 777-9788 or wetomes0@gwm.sc.edu.

INDIANA

DIPLOMA Program – DIPLOMA (Development Improvement & Preparation for Leadership Organizational & Management Achievement) was established in 1993 to allow officials and county employees access to training geared specifically to county government. After accruing 30 credit hours of study within two consecutive years, program participants qualify for DIPLOMA certification. While the program *must* be completed within two years, it *can* be completed in one year. Once the program is completed, the Association of Indiana Counties has a graduation ceremony at its annual conference.

DIPLOMA offers two sections of courses. Full-day courses are worth five hours of credit, and half-day courses (electives) are worth two-and-a-half hours of credit. Most courses are stand-alone sessions, but three hours of credit are available at the annual conference. For those individuals who have already received their DIPLOMA certification, a continuing education certification is be awarded for those who take 20 hours of credit within one year. To reward those people who have truly made education a priority, the DIPLOMA Masters Pin is given to those who have accumulated a number of credit hours in the program.

- The Silver Masters Pin requires 75 total credits
- The Gold Masters Pin requires 125 total credit hours.
- The Platinum Masters Pin requires 180 total credit hours.

According to the director of planning and professional development at the Association of Indiana Counties, the AIC arranges all course speakers and handles the program's administration. The program has received excellent feedback on its services, mainly because it offers county officials applicable and important skills.

Notable best practices of Indiana:

1. Most of the speakers are association members or state employees. Most university speakers will charge a fee, while government officials are usually free. Registration is done for each course individually online.
2. The program director uses and continues to use evaluation forms at the end of each course to ask for suggestions on improvements to courses and the program overall.

The DIPLOMA program is *optional.*

Newly-Elected Officials Training – Each odd-numbered year, the AIC offers training for newly elected county officials. This event, usually on a Saturday, offers presentations on a variety of topics, such as human resource law, county budgeting, the roles of all county officials, public access law, and legislative information.

The newly-elected officials training is *optional*.

For further information, visit the Association of Indiana Counties at www.indianacounties.org/department/?fDD=4-0.

Contacts:

- Shawna Schwegman, Director of Planning & Professional Development, Association of Indiana Counties, at (317) 684-3710, extension 11, or sschwegman@indianacounties.org.

NEW MEXICO

County College – Managed by New Mexico State University Cooperative Extension Service, and in collaboration with the New Mexico Association of Counties, County College is a professional development certification program for county officials in New Mexico. Participants can earn units toward County College certification at New Mexico Association of Counties (NMAC) sponsored workshops as well as those sponsored by New Mexico State University. These events include:

- Better informed public officials conference
- Mid-winter legislative conference
- Pre-summer conference
- Statewide training events

The completion of County College requires 36 training units. These consist of 24 core courses and 12 affiliate specific units. Many of the programs are offered in conjunction with regional association conferences or affiliate meetings. Participants must pay a fee for County College, as well as additional registration fees for each course they take.

New Mexico State University handles all applications. The university manages all participant files, as well as provides participants with a curriculum worksheet to ensure timely completion of the certification program. According to the NMAC, the county association primarily acts in an advisory role. It surveys association members, affiliates, and university associates about the changing needs of county officials, and then translates those needs into the course offerings of the college. NMAC has created an Advisory Council for County College, consisting of 21 members of their affilate groups. This council acts as the ultimate governing body for the program.

According to Mary DeLorenzo at NMAC, participation has been low, but is growing steadily. Class sizes are around 65 per course. The highest number of participants are newly elected commissioners who seem to recognize and relate the value of the program to their success as a county official.

Currently, New Mexico State is working on a distance education program for the County College. Creating helpful courses and finding funding has been difficult, but the NMAC is hopeful that these courses will be offered soon. Instead of testing participants to see if they have completed a program course, NMAC is working to implement a log-in authentication system so that participants can complete the course entirely online.

The County College program is *optional*.

For further information, visit the New Mexico State University County College at spectre.nmsu.edu/dept/welcome.html?t=ccol, and the New Mexico Association of Counties at www.nmcounties.org.

Contacts:

- Mary DeLorenzo, New Mexico Assocation of Counties, at (505) 983-2101 or (505) 469-6410, or mdelorenzo@nmcounties.org.
- New Mexico State University County College at (505) 646-5096 or countycollege@nmsu.edu.

National Association of Counties (NACo)

Advanced Leadership Training (ALT) – This educational series is offered in a variety of formats. Seminars are held in conjunction with NACo's Legislative Conference in Washington, D.C., as well as its Annual Conference and Exposition.

ALT seminars can also be scheduled within an individual state or county per request. ALT programs can be scheduled as key-notes, half-day workshops, full-day seminars, consulting or technical assistance for the board or management team; or ongoing training and leadership development for the county workforce.

For further information, visit the National Association of Counties at www.naco.org.

Contacts:

- Sandra Clark, manager, NACo Educational Services, at (202) 942-4277 or sclark@naco.org.

NORTH CAROLINA

North Carolina currently offers a three-day training program, "Essentials of County Government," through the Institute of Government at UNC-Chapel Hill and sponsored by the NCACC. The IOG also offers additional courses in board relations, board assessment, economic development, managing conflict, ethics and orientation for new board chairs.

The remainder of local government curriculum is county department specific. An advanced program for elected and appointed officials has been created on an "as needed" basis in one- to two-day workshop formats.

The "Essentials" workshop is moved around the state to various locations each year to make it more convienent for commissioners. Fees are paid on a course-by-course basis, with no annual fee from the IOG. There is no continuing education credit or certification offered by the program.

The response to the IOG workshops has been mixed. Approximately 50 percent of newly elected commissioners attend the program. According to Carl Stenberg at the IOG, there must be needs assessments done about continuing education. County officials must be asked:

- What is the perceived value of the IOG to county government and what changes must be made?
- Is there a need for a higher level of classes beyond the orientation level?
- Does N.C. need a certification program? Will it act as an incentive to officials or have no effect?
- Can the programs be more accessible through distance learning, or will the loss of a peer learning environment make the program less effective?

Essentials of County Government and the Institue of Government are *optional*.

For further information, visit the North Carolina Association of County Commissioners at www.ncacc.org, or the UNC Institute of Government at ncinfo.iog.unc.edu/calendar/bysubject/elected.html.

Contacts:

- Patrice Roesler, Deputy Director, NCACC, at patrice.roesler@ncacc.org.
- Carl Stenberg, Professor of Public Administration and Government, IOG, at (919) 962-2377 or stenberg@sog.unc.edu.

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