

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 (Plumtre 2006). As Tim Plumtre 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 our 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? (Plumtre 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 taken 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.

Mary Ann Black, former Durham County commissioner

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 from 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 within 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.

Breeden Blackwell, Cumberland County commissioner and 2004-05 NCACC president

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.

Kitty Barnes, Catawba County commissioner and 2005-06 NCACC president

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.

Tom Lundy and Catawba County Management

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.

Lori Brill and Onslow County Management

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 be 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 offers 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 Performing 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

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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?