MANAGING IN THE FAST LANE

Mileposts for Byway Boards
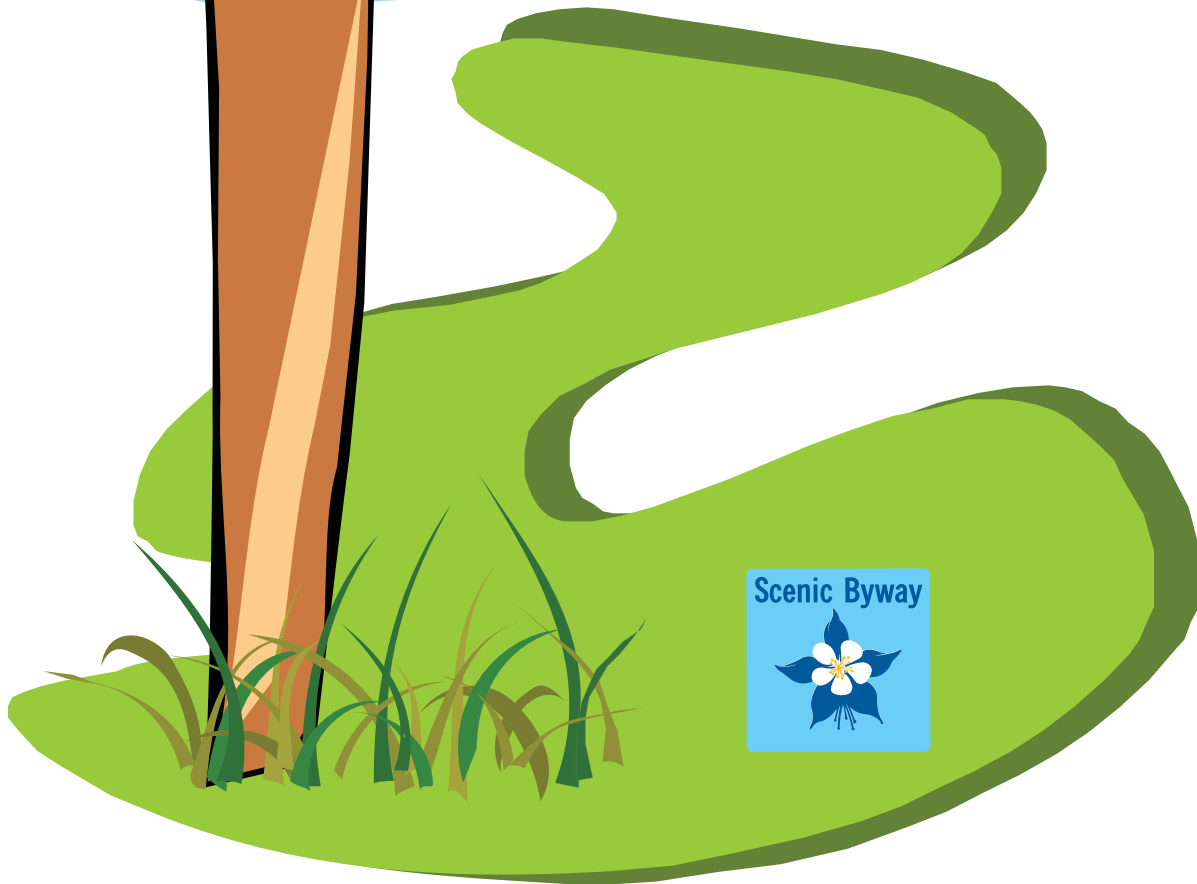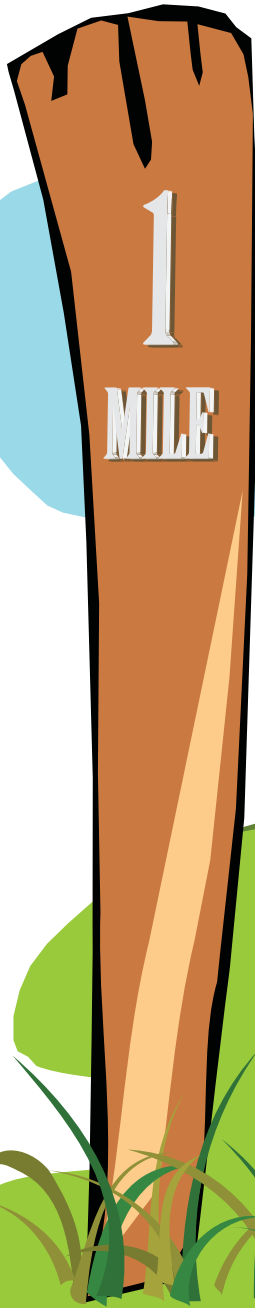
1 MILE

Scenic Byway

COLORADO SCENIC AND HISTORIC BYWAYS PROGRAM

To Members of Byway Governance Boards:

What Scenic Byway governing board wouldn't want an inoculation of insight from a professional facilitator once a year? Annual retreats give many nonprofit boards a chance to review progress, to refresh their shared vision, and to revise their work plan for the year ahead. For many rural boards, however, this annual uplift from an outside consultant is sheer luxury. This toolkit was compiled for the small volunteer boards – those that are essentially on their own.

People join volunteer nonprofits boards for many reasons, but all hope to help to contribute to the stewardship they believe is essential to healthy communities. Well-functioning boards have woven their work into the very fabric of rural communities, and in many places, dedicated individuals serve on multiple boards. Although people join with high aspirations, some of these same highly motivated people start dreading the board meetings themselves. What exhausts these well intentioned working groups? Our surveys with byway leaders in Colorado and our consultations with trainers in board management agree that it comes down to three intertwined dynamics:

1. The range of topics discussed at each meeting is too wide
2. The same broad topics are revisited month after month
3. 80% of board meeting time is spent on old business, and only 20% on future actions

This toolkit is designed to overcome these specific detriments to progress, and to direct the collective energies of the Board toward key actions. Most simply, it is designed to help Scenic Byways board members use their time together efficiently.

We have replicated the format established by the Grassroots Training Program, based on feedback of Colorado Byways leaders and byway trainers across the country. The usefulness of this first self-help kit is best summarized by one leader who reports she has used the hospitality training "on and off" for the past five years.

> *"In working with Byway Boards, I didn't need to relearn things, I just needed to be reminded what I already knew. I want the design of this new kit to help me in that same uncomplicated way—just boil it down to the essential bullet points that will keep us on track!"*
> -Ann Marie Valesquez

That is exactly what we have set out to accomplish. To make the month-to-month operations of governing a Scenic Byway easier (and more fun), we have designed card games and activities that are easy to use, templates that can help you push project work out the door, and samples of documents that will most probably be in your work plan.

We thank you for your commitment to preserve our resources and to promote our byways, and hope that a tighter work focus and more efficient meetings will give you more time to personally enjoy those intrinsic assets we are working to preserve—scenic, historic, natural, recreational, cultural and archaeological. Thanks especially for those many precious hours you give to keep the byways a vibrant part of the Colorado landscape.

Best regards,
Sally Pearce, Program Director
Colorado's Scenic and Historic Byway

GOALS OF THIS TOOLKIT

The Goal of this Toolkit
Is to help transform
Rural non-profit governing boards

So members are investing 80% if their time together
Focused on Key Actions
Directed toward their Shared Vision

And only 20% of their time
On the organization's housekeeping
And old business

80

20

Managing in the Fast Lane
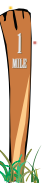
WHO IS USING THESE MATERIALS?

People who can relate to thorny questions posed by Richard Chait in *Governance as Leadership* (Wiley and Sons, 2005):

1. Why is there so much rhetoric that touts the significance and centrality of non-profit boards, BUT so much empirical evidence that boards are only marginally relevant or intermittently consequential?

2. Why are there so many how-to-govern handbooks, pamphlets, seminars and workshops, BUT such wide spread disappointment in board performance?

3. Why do nonprofits go to such great lengths to recruit the best and brightest as trustees, BUT then permit these stalwarts to languish collectively in an enviroment more intellectually inert than alive, with board members more disengaged than engrossed?
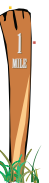
HOW TO USE THIS MANUAL

Leader uses
the LEFT page
to guide preparation
ahead of the training time.

Leader uses
the RIGHT page
as a prop during
the training itself.

This is the idea
the activity
should elicit.

Discussion
Role Play
Game
Map.

Graphic of
materials
found in kit or
templates in
Appendices.

**CREATING A
SHARED VISION**

CONCEPT

ACTIVITY TYPE

PREP TIME

PREPARATION

Step 1:

Step 2:

Step 3:

LEADER NOTES

ACTIVITY TIME

ACTIVITY

Things the Leader Should Say Outloud

WRAP UP

Managing in the Fast Lane
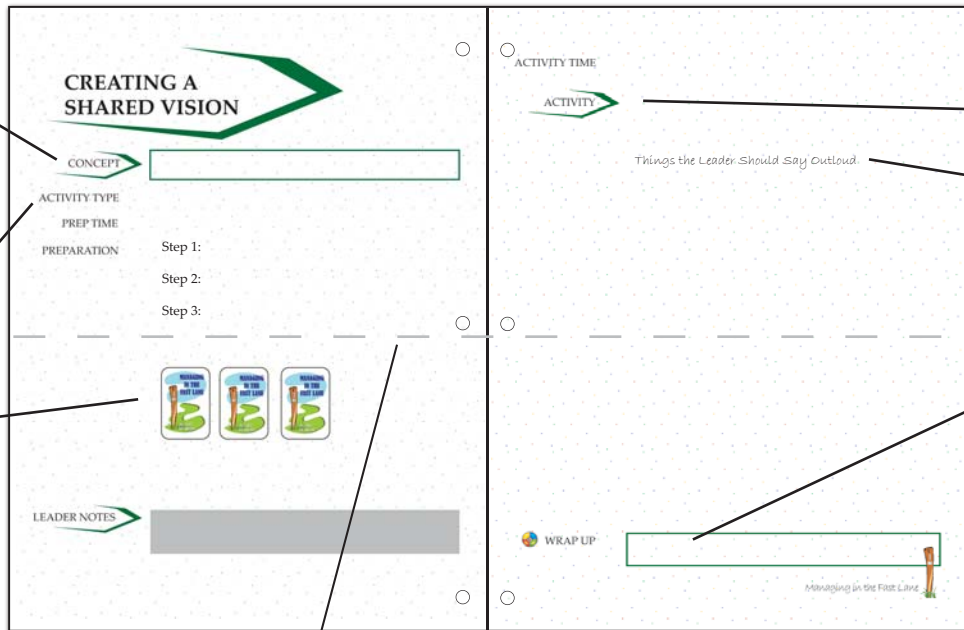
Step-by-step
progression of
the activity.

Scripted text
indicates things
Leader should
say.

A "Sound Bite"
to conclude the
activity. Ties
directly back into
the concept.

Presentation Book
with horizontal mid-fold
is propped up so the
trainer can see it
easily as the activity
progresses.

CONTENTS

Managing in the Fast Lane

SUSTAINABILITY INDICATORS

	Activity	Concept	Activity Type	Local Leader Experience Required	Prep Time / Activity Time	Supplies Required
SA-1	SELF ASSESSMENT: ORGANIZATION	Rating effectiveness with mission, planning, structure, recruitment, retention and succession, management	Self evaluation	None required	5 min. / 30 min.	Indicator rating sheet (2 pages)
SA-2	SELF ASSESSMENT: RESOURCES	Rating effectiveness of resource inventory, intrinsic qualities, stakeholders, resource management strategy	Self evaluation	None required	5 min. / 30 min	Indicator rating sheet (2 pages)
SA-3	SELF ASSESSMENT: FUNDING	Rating effectiveness with volunteers, fundraising, funding flexibility and agility, fiscal vigor and financial endurnace.	Self evaluation	None required	5 min. / 30 min.	Indicator rating sheet (2 pages)

CREATE A SHARED VISION

	Activity	Concept	Activity Type	Local Leader Experience Required	Prep Time / Activity Time	Supplies Required
SV-1	SEPARATING MISSION AND VISION	The mission is broad and intangible; the vision is narrower and tangible, and not yet achieved.	Brainstorming	None required	5 min. / 30 min.	Table tents (ground, couds, planes) Blank index cards Black pens w/bold tips
SV-2	CREATING A SHARED VISION	Narrow the focus to reach a consensus and a shared vision.	Discussion	None required	3 min. / 20 min	Year markers (1 3 5 10) Masking tape Blank index cards Black pens w/bold tips
SV-3	KEEPING THE VISION VISIBLE	A printed copy of the shared vision serves to continuously focus members' attention	Printing table tents	None required	60 min. / 1 min.	Indicator rating sheet (2 pages)

GENERATE ALTERNATIVE STRATEGIES

	Activity	Concept	Activity Type	Local Leader Experience Required	Prep Time / Activity Time	Supplies Required
GS-1	RECRUITING NEW BOARD MEMBERS	Analyze skill set from current board to determine who to recruit.	Card Game	None required	5 min. / 30 min	Deck of 24 cards Tent card header (skills strongly represented, need improvement, missing) Board Skills Worksheet
GS-2	EXPANDING PARTNERSHIPS	Expanded partnerships help leverage human resources of small organizations.	Card Game	None required	5 min. / 15 min.	Deck of 24 cards Tent card header (public partners, private partners, community partners) Partners Worksheet

FOCUS ON KEY ACTIONS

	Activity	Concept	Activity Type	Local Leader Experience Required	Prep Time / Activity Time	Supplies Required
FA-1	FOCUS ON KEY ACTIONS	To best use valuable time, assign responsibilities to key actions only.	Charting tasks and assigning work	None required	5 min. / 20 min.	Flipchart or newsprint easel

SUSTAINABILITY INDICATORS

SCENIC BYWAY SUSTAINABILITY INDICATORS

ABOUT THE TOOLS

The America's Byways Resource Center has designed the following Sustainability Indicators that can be used as tools to help you address your organization's key strengths and weaknesses. There are three separate Indicator tools (Funding, Organization and Resources). Each Indicator tool has 4 to 5 statements that we have found are key byway activities. After each statement, users estimate where they feel their byway organization sits along a continuum from 1 to 5. For example, if you select 5 for one of the statements, you would consider that this particular activity represents a strength of your byway organization.

USING THE TOOLS

The Indicators are meant to be completed by each individual member of your organization. After completing them individually, your organization members can share individual results in a group setting. Your discussion about the different group members' perceptions will contribute to more effective planning by the organization going forward.

These Indicators may not be comprehensive in measuring the relative health of your organization, but they can act as a great starting point for discussions about the future direction of your organization.

IMPORTANCE OF SUSTAINABILTY

The National Scenic Byways Program is a dynamic grassroots program based upon the shared vision and efforts of partners to protect, preserve, promote and enhance the intrinsic qualities and resources of their special roads. But what is it that makes byways sustainable? What is necessary to support lasting efforts of a byway organization? Byway groups work hard to obtain designation at the state, federal lands, Indian tribe, or national level, often to next come up against the big question: "Now what? How do we keep this going?"

The sustainability of byways and byway organizations around the country is critical to long term success. You can think of a sustainable byway as a three-legged stool, with the legs representing Planning, Intrinsic Qualities, and Visitor Experience. If any leg of the stool is weaker than the others, the stability of the stool will be compromised. Similarly, a byway that is unbalanced in any of these three areas will have weaknesses that will affect the stability or "health" of the byway.

The development of strong partnerships and successful planning efforts to support byways can be measured in direct correlation to a byway organization's attention to these "core elements" that are essential to a byway's sustainability.

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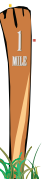
Sustainability Indicator:
ORGANIZATION

Instructions: Read the range of stages for each sustainability factor and decide where on the bar chart your organization presently ranks. Color a dark line from the left to a point on the bar chart that indicates your assessment of the relative health of your organization on each factor. The line may stop at any point on the chart.

Example:

1	2	3	4	5

1. **Mission and Plan** (Our organization has a mission, vision, and a Corridor Management Plan, CMP, to make it all happen.)

1	2	3	4	5
My byway has a general idea of what we want to accomplish.	My byway has a CMP that we refer to occasionally.	My byway has a mission, vision, and a CMP.	My byway integrates our mission and vision into decision making.	My byway prepares action plans that flow from our integrated vision, mission and CMPs.

2. **Structure** (The byway group has an agreed upon and functioning organizational structure with clear decision-making and conflict resolution methods.)

1	2	3	4	5
My byway group has not talked about how we should be structured.	My byway has a loose, verbally agreed upon structure.	My byway has a written structure that is defined in legal documents and/or our minutes.	My byway has a formalized structure and we have a written decision making method that we use at all meetings.	My byway has a good, formalized structure, we follow agreed upon decision making methods and we have agreed upon ways to manage conflicts.

3. **Recruitment, Retention and Succession** (The group has a defined new member recruitment program and defined methods for retaining members. The group has a strategy for preparing new leaders and dealing with unexpected membership changes.)

1	2	3	4	5

1	2	3	4	5
My byway takes new members as they present themselves and copes with people leaving as it occurs.	My byway has a defined recruitment program.	My byway has a recruitment program. My byway also has a retention program.	My byway has recruitment and retention programs. My byway also has a leadership succession plan.	My byway has recruitment, retention and leadership succession plans. We evaluate their success each year and make needed adjustments.

4. **Management** (The group has a good process for prioritizing work, delegating responsibility and managing to completion.)

1	2	3	4	5

1	2	3	4	5
My byway deals with work challenges and opportunities as they arise.	My byway has a process for setting work priorities. We also periodically put together an action plan that covers at least several months.	My byway sets priorities, makes action plans and delegates work in a manner that plays to people's strengths.	My byway sets priories, makes action plans, delegates work and has a management structure that ensures that work gets done.	My byway integrates the previous ideas so that projects are completed and members are satisfied with their involvement in our group.

Scenic Byway Sustainability Indicator:
RESOURCES

Instructions: Read the range of stages for each sustainability factor and decide where on the bar chart your organization presently ranks. Color a dark line from the left to a point on the bar chart that indicates your assessment of the relative health of your organization on each factor. The line may stop at any point on the chart.

Example:

1	2	3	4	5
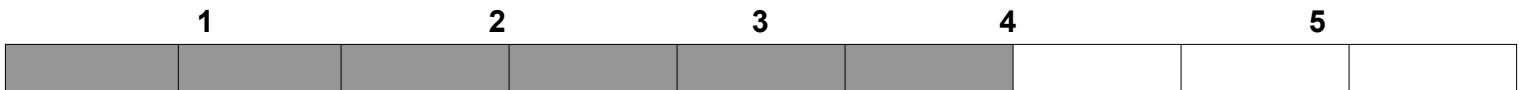
1. **Resource Inventory** (a comprehensive written inventory of byway resources)

1	2	3	4	5
My byway group has a clear sense of purpose, has identified our most important assets, and has agreed verbally on what our priorities should be.	My byway group has a written resource inventory that formally identifies all the resources along the corridor and documents essential information on each.	My byway has a written statement that expresses its essential character (the sum total of its assets) through the "power of story." Our group demonstrates stewardship of the byway.	My byway group has a resource inventory with a written timeline that identifies opportunities and threats, projects possibilities, and predicts change.	My byway has a written resource inventory that we use to help us continually build a big vision.

2. **Intrinsic Qualities** (byway's assets categorized as scenic, historic, natural, cultural, archaeological, and recreational)

1	2	3	4	5
My byway group has identified important assets in at least three of the all six categories: scenic, historic, natural, cultural, archaeological, recreational.	My byway has integrated elements of the physical environment and the human community into a statement or theme that effectively expresses a sense of our place.	In verbal and written communications, my byway group describes the value of our corridor as a whole, not just a collection of its individual parts.	My byway group has a written statement that incorporates intangibles to express the sense of our place.	Core members of my byway group consistently use common language to effectively communicate our byway's intrinsic qualities to stakeholders, to partners, and to the broader community.

3. **Stakeholders** (everyone in the community who has an interest in how the assets of the byway are utilized)

1	2	3	4	5
My byway has built formal relationships with partner organizations, and with individuals who are passionate about protecting and enhancing the intrinsic qualities of the byway.	My byway group actively educates local citizens about preserving and enhancing the aesthetic quality along the byway.	My byway has a written comprehensive list of stakeholders; how they impact the corridor; and how change on the corridor may impact them.	My byway proactively seeks input from stakeholders who impact the character of our byway, including developers, real estate agents, property owners and local businesses.	My byway creates a strong sense of identity and cohesion amongst stakeholders by making public every small success. We demonstrate that "success generates success."

4. **Resource Management Strategy** (a long-term plan outlining how the byway will be managed as a sustainable system—one that continues indefinitely)

1	2	3	4	5
My byway has clearly identified the most pressing threats to our assets, has identified the greatest opportunities, and set priorities.	My byway has listed eligible resources with the appropriate agencies/partners that can affect the long-term health of these eligible resources. We have identified those assets that require investment and/or maintenance.	My byway employs regulatory measures to preserve and enhance the aesthetic qualities of our byway. We have developed and published design guidelines.	My byway has acquired property or development rights to permanently protect special landscapes.	My byway group is action-oriented, and is implementing strategies to protect the character and resources of our corridor. We regularly review progress and adjust our strategy.

Scenic Byway Sustainability Indicator:
FUNDING

Instructions: Read the range of stages for each sustainability factor and decide where on the bar chart your organization presently ranks. Color a dark line from the left to a point on the bar chart that indicates your assessment of the relative health of your organization on each factor. The line may stop at any point on the chart.

Example:

1	2	3	4	5

1. **Strength of Fundraising** (a systematic approach to developing volunteers)

1	2	3	4	5
My byway currently operates with a small core of volunteers and donated space.	My byway has five or more active volunteers and has a dependable place to meet or operate.	My byway has the same ten people (STP) volunteering and has a dependable place to meet or operate.	My byway has ten or more active volunteers, regularly gets new volunteers, and has access to more than one place to meet or operate.	My byway has 20 or more active volunteers, gets new members regularly, has good volunteer turnout for special events/ projects, and has space to meet or operate.

2. **Strength of Fundraising** (a systematic approach to developing funding contacts)

1	2	3	4	5
My byway has a few active members and has made a list of byway stakeholders or compiled a list of contacts (organizations and individuals) from which it might obtain volunteers or secure funding. We have asked for money from at least one source.	My byway has conducted an analysis of the skills needed for fundraising and managing the fiscal affairs of the byway, has started seeking volunteers and requesting funding and has a small group of volunteers and some funds.	My byway has members who have the ability to recognize the components of strong fundraising program, the skills to make a compelling story and has obtain funding from a local source.	My byway has developed a core of five to ten funding "friends," has a systematic strategy to do fundraising, and has a strong cadre of trained volunteers who are capable of maintaining the volunteer base and developing attractive funding proposals.	My byway has a strong volunteer recruitment staff, a fundraising strategy, has developed successful fundraising proposals and has core of five to ten reliable trained grant writers, fund-raisers, and/or donors.

3. **Funding Flexibility & Agility** (the diversity of funding sources and the degree to which an organization has a plan for adjusting if sources of funding are eliminated)

1	2	3	4	5
My byway knows that the FHWA gives grants. My byway has not raised money.	My byway has received funding from at least one or two sources since it started.	My byway receives funds annually from one or two dependable sources.	My byway receives funds from at least three or more sources annually.	My byway has multiple dependable funding sources and a dependable space to meet.

4. **Fiscal Vigor** (the extent to which an organization has funding levels and resources to stay in business and protect byway resources over a long period of time)

1	2	3	4	5

1	2	3	4	5
My byway has some cash somewhere controlled by someone. We are thinking about raising some money from somewhere to do something.	My byway has an annual cash flow and a checking account managed by an elected or appointed official. The funds we have, or raise, are sufficient to cover the cost of doing business or projects we have sponsored.	My byway has a regular a reliable cash flow, a checking account, some investments or a savings account, and has received one or more grants or donations in the past three years for a total of $10,000+.	My byway has a dependable cash flow, a checking account, some investments or a savings account, receives donations or grants every years for a total of $10,000+, and/or holds conservation easements or deeds to byway properties and has had sufficient funds to maintain a paid staff for the past three or more years.	My byway has a dependable cash flow, a checking account, some investments or a savings account, receives one or more grants or donations every other year totaling $10,000+, holds conservation easements and deeds to byway properties, has raised funds to preserve byway properties, has had sufficient funds to maintain an executive director or paid staff for the past five or more years.

5. **Financial Endurance** (the active parts of planning and managing the fiscal affairs of a byway organization)

1	2	3	4	5

1	2	3	4	5
My byway has a annual budget, a work plan and a person who has volunteered to collect and distribute our funds.	My byway has a multi year (two or more years) budget plan that relates logically to our work plan, a fundraising committee, and a competent volunteer doing our financial planning and managing our accounts.	My byway is a nonprofit corporation or has a nonprofit partner, has a multi year (two or more) budget plan that relates logically to our work plan, a fundraising strategy and committee, contingency plans and a competent appointed or elected fiscal officer.	My byway has corporation status (nonprofit and/or for profit), a multi year budget plan that relates logically to our work plan, a fundraising strategy and committee of fundraisers, contingency plans and a competent appointed or elected fiscal officer who fills required fiscal reports.	My byway has corporation status (nonprofit and/or for profit), a five- year budget plan that relates logically to our work plan, a fundraising strategy and trained team, contingency plans, a paid trained fiscal officer who fills required fiscal documents and we have audits conducted on an regular basis.

CREATE A SHARED VISION

— **Separating Vision and Mission**

— **Creating a Shared Vision**

— **Keeping the Vision Visible**

SEPARATING VISION AND MISSION

An organization's mission (purpose) is broad and intangible. The board's collective vision is narrower and more specific.

ACTIVITY TYPE

Brainstorming

PREP TIME

5 Minutes

PREPARATION

Step One: Set the room up for the activity.

- Write the organization's official mission statement on a white board where it can be easily read
- Clear the table of clutter and personal items.
- Set up in front of each board member
  1. A stack of 10 blank index cards,
  2. A pen with a bold tip and
  3. A tent header card that reads Ground-Clouds-33,000 feet
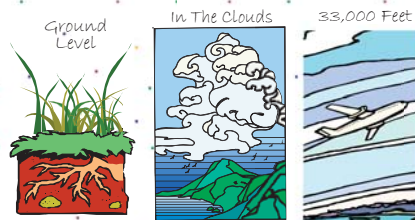
LEADER NOTES

-The organization's mission is broad and overarching –its core purpose viewed from 33,000 feet.

- A vision is a compelling idea that has the power to inspire action and motivate the entire organization—the cloud level.

-Action is that work that is done to achieve the vision- ground level.

ACTIVITY TIME   10-15 minutes

ACTIVITY

1. Introduce the activity

Let's use our arms to get a feeling for the activity: GROUND (thump the table top), CLOUDS (make a circle with both arms: PLANES (arms outstretched above the head). Repeat with me:

    Ground-Clouds-Plane
    Ground-Clouds-Plane
    Ground-Clouds-Plane

(This movement and chanting should produce group laughter)

2. Please write down ideas of how you see us fulfilling our mission (which is posted in front). Write one vision per card. Generate many possibilities as you can instead of working to perfect one. (Spend 3-5 minutes writing.)

3. Now sort your ideas, "Solitaire style" in columns under the tent header Ground-Clouds-Planes from the overarching (viewed from 33.000 feet) to the concrete (on the ground).

4. Discuss: How were your ideas your ideas grouped...on the ground or at elevation?

    (See leader notes for definitions)

Put aside the Cloud level—Visions that might be compelling enough to motivate all of us, and our communities too, for the year ahead.

WRAP UP

Our organization's mission is unchanging, yet we have the power to select a single vision that can direct and focus our board actions.

Managing in the Fast Lane

CREATING A
SHARED VISION

A shared vision should serve as the compass for all actions of the Governing Board

ACTIVITY TYPE

A Discussion held while Standing Up and Moving About

PREP TIME

3 Minutes

PREPARATION

Step One: Gather your materials and set up the room
1. One black pen with bold tip for each member
2. Five blank index cards or sticky notes
3. Year markers 1-3-5-10 (each printed on 8.5" x 11" sheet)
4. Masking tape

Step Two:
- Clear the table top of clutter so that only one black pen and five blank index cards are placed in front of each board member's place at the table.
- Tape the One-Three-Five and Ten year markers along a wall arranged like a time line.
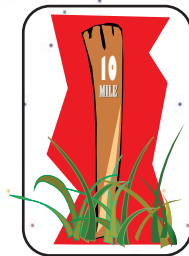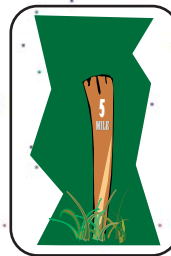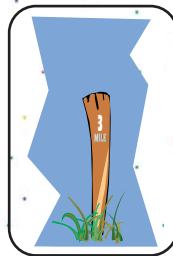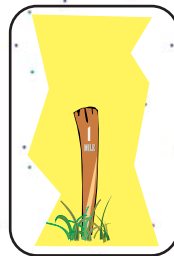
LEADER NOTES

Remind the group about the difference between a mission and vision. Repeat definitions from the previous activity if the group is not clear. Remember, a vision is something that can be seen and described in detail, but is not yet reached…the cloud level in the previous exercise.

This activity can be used alone, or as follow-on to the previous activity, Separating Mission and Vision.

10-15 minutes

1. State the purpose of the activity:
   - This activity will help us understand if we all share a common vision for this organization, or if we are operating with visions which may be very different from one another.

2. Direct the group to fill the cards: (If they have vision statements from the previous activity, ask them to save those, and think of additional visions.)
   - You each have five blank cards (and the cards we wrote in the last activity). Please take the next five minutes to generate as many visions as you can for this organization. Please use a separate card for each vision.

3. Direct individuals to move toward the wall:
   - Now we will move to the second half of the activity. Please look to the wall, and estimate when this organization could accomplish each of your visions.
   - Then move to the wall and using masking tape. Post each of your visions next to a year marker. When you are finished, stand next to the one vision that you feel is most important.

4. Analyze the range of visions produced:
   - Start by asking each board member to discuss their best vision and tell why they thought it could be accomplished within that timeframe. As the group discusses the vision, consolidate similar visions by taping them together, and move them up and down the timeline to reflect group consensus.
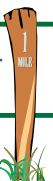
5. Discussion and conclude:
   - From these many ideas, can we choose ONE VISION that is shared by our full Board? Is there one that is compelling enough to attract others to support it? Can we all believe in one vision?

WRAP UP

A shared vision will narrow the focus and thus be the primary guide for all actions of the board.

Managing in the Fast Lane

KEEP THE
VISION VISIBLE

CONCEPT

A constant visual reminder of the board's shared vision will help focus time, discussion and actions during each meeting.

ACTIVITY TYPE

Printing tent cards

PREP TIME

30 minutes before first meeting to print the set
1 minute each meeting thereafter to set up conference table

PREPARATION

Print one tent card for each board member
Buy Avery Labels 5309 or use enclosed template

Easiest:
Print name of each board member on one side.
Print the Board's Shared Vision on other side.

Fastest:
Use template on memory stick to print out on stock paper.

Vision Statement

LEADER NOTES

Remember, a vision is something not yet accomplished, something we can work together to achieve.

ACTIVITY TIME   1 minute for each meeting

ACTIVITY   Prior to the start of the meeting, prop one tent card in front of each board member with the shared vision facing the member, the member's name facing the middle of the table.

Throughout the meeting time feel free to refer to the shared vision if conversation and ideas begin to go in a direction that is not consistent with that vision.

WRAP UP   Together we collaborated and selected one vision that will guide all of our activities in the coming year. Let's agree to prop this vision in front of each of us at every future meeting to create a tight focus for our time, our discussions and our actions.

Managing in the Fast Lane

GENERATE ALTERNATIVE STRATEGIES

- Recruit New
  Board Members

- Expand
  Partnerships

RECURITING NEW BOARD MEMBERS

CONCEPT — To recruit new board members for your Byway, focus on specific skills you need to get your board work done.

ACTIVITY TYPE — Card game played on a large conference table

PREP TIME — 10 minutes

PREPARATION — **Step One:** Gather materials for members to work in pairs. Give each pair one tent card and a deck of 24 "Board Members" playing cards that include the skills and abilities listed below.

Fold Tent Cards with three categories found in the Templates

Skills:
- Bookkeeping
- Computer
- Volunteer Recruitment
- Creating Links with Local Government Agencies
- Conducting Meetings Efficiently
- Fundraising
- Political Experience
- Resource Protection
- Marketing/Public Relations
- Managing Special Events
- Interpretation
- Linking to Mulitple Communities
- Involving the Business Community
- Strategic Thinking/Long Term Planning
- Partnering with Other Organizations

Ability to:
- Evaluate Paid Staff
- Balanced Geographical Representation
- Communicating Vision to Communities
- Work Cooperatively
- Create a Shared Vision
- Execute Key Actions
- Agree on Guiding Principles
- Network Broadly
- Maintain Tight Focus

Step Two: Completely clear a large conference table so that only the decks and tent cards are visible. Ask Board members to put notebooks, purses, coats, etc. in a place away from the table.

ACTIVITY TIME   30 - 45 minutes

ACTIVITY ▶

State the purpose of the activity.

We have agreed that we need to recruit new board members to help us accomplish our collective vision.

1. Give directions for the first card sort.

- The first step in this structured activity will help us evaluate our current strengths.
- We are going to arrange the cards in the deck, Solitaire-style.

STEP 1	Table Arrangement	Card Arrangement
Rank Current Situation		
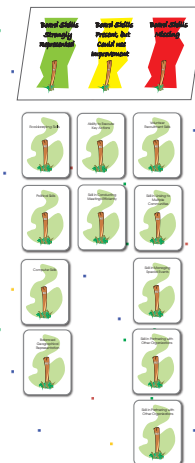
- In the first column, place those skills that are strongly represented.
- In the second column, place those that represent the skills that are present, but could use improvement.
- In the third column, place those skills that our board is currently missing
- Set aside any cards that do not relate to the work of this board..

DO THAT NOW!

To complete your evaluation of our current Board, now rearrange each row.

- Place the card with our strongest collective skills AS A BOARD at the top of each row, and the weakest at the bottom.
- When you are finished, make no more changes to your pairs arrangement.

2. Give directions for the second card sort.

You will need to stand up for the next part of the activity. Listen carefully as I DIRECT you to move cards from a SPECIFIC part of your pair sort INTO A NEW ARRANGEMENT IN THE CENTER OF THE TABLE. Our next arrangement will be horizontal.

STEP 2	Table Arrangement	Card Arrangement
Combine Rankings and Identify Strongest Needs		
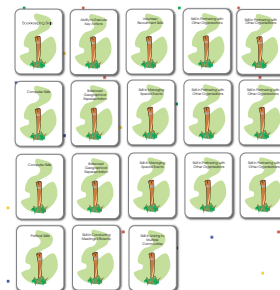
- Take the LOWEST CARD IN YOUR THIRD ROW under the header "Board Skills Missing" and place in the center of the table. Each pair will place one card in the first row.

- Now return to your own sort, and again take the LOWEST CARD IN THE THIRD ROW. Now place that card in a second horizontal row under the first row.

• Proceed in this bottom-up manner until all the cards from every pair are moved to the center of the table.

• Now move to the cards in middle row below the header "Board Skills Present, But Could Use Improvement". Move the bottom two cards in this row then stop.

• Now FOLD UP the remaining cards "Board Skills Strongly Represented" and hand them to me. **(Here the leader collects all cards, and wraps with a rubber band.)** We are putting these cards aside, as they represent our current strengths as a Board.

3. Give directions for stacking duplicate cards.

Before we begin the next step, stack identical cards on top of each other, always working bottom to top:

STEP 3	Table Arrangement	Card Arrangement
Move up & Stack Duplicate Cards		
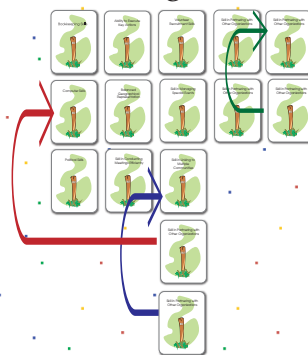
• Start at the bottom of the card sort and move any repeat cards up to the higher rows.

• We have now identified the skills that we need most to strengthen our current board. Let's not move this arrangement until it is recorded.

4. Give directions for brainstorming and recording.

• Now we will BRAINSTORM a list of people in our communities who have those specific skills. I will list them on the board, and (name), will capture them. At this point, our job is to GENERATE AS MANY NAMES AS WE CAN, not to think of the our top candidate, or whether or not they would have time to join our board.

Our full list of names will be given to our nominating committee, and we will await their recommendations. We will keep our list of both ranked skills and possible candidates until we decide to play this card game again.

WRAP UP

We have generated a list of potential Board Members that will balance our current skill set.

Managing in the Fast Lane
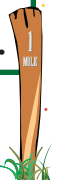
EXPANDING PARTNERSHIPS

CONCEPT

Expanded partnerships can help leverage the human resources of any small organization.

ACTIVITY TYPE

Card game played on large conference table

PREP TIME

10 minutes (first meeting)

PREPARATION

Step One: Gather materials for each board member to work in pairs. Give each pair a deck of 24 Partners playing cards that include the types of partners listed below:

National Park Service	Local Business Owners	Land Trust Organizations
National Forest Service	Local Service Businesess	Visitor's Information
Bureau of Land	Local Tourism Attractions	Centers
Management (BLM)	Construction Companies	Landowners
Federal Highways	Local Youth Groups	Regional Museums
Administration	Recreational Gear	Libraries
US Fish and Wildlife	Manufacturing Companies	Local Government
State Department of	Conservation	Historic Preservation
Transportation	Organizations	Organizations
State Parks	The Grouch	Foundations
Division of Wildlife		

Photocopy tent cards and blank cards from the template section, providing four blank cards per working pair and one tent card.
Fold the tent card and cut the playing cards to size.

Step Two: Completely clear a large conference table so that only the decks and picture tents are visible. Ask board members to put notebooks, purses, coats, etc. in a place away from the table.

LEADER NOTES

The mechanics of this card game are similar to those of the previous activity, Recruiting New Members activity. See Leader Directions for Card Sorts in the templates.

ACTIVITY TIME   30 - 45 minutes

ACTIVITY >

State the Purpose of the Activity.

The purpose of this activity is to identify organizations that could partner with us to help realize our vision and carry out our action plan.

Give Directions for the first Card Sort.

The first step in this structured activity will help us evaluate the strength of our current partnerships and then identify what we should look for in additional partners.
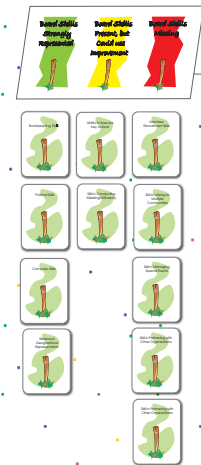
STEP 1   Table Arrangement   Card Arrangement

Rank
Current
Situation

• We are going to sort the cards in the deck, Solitaire-style, using the tent card to keep our focus.
• In the first column, place those public sector agencies that we COULD partner with to accomplish our work.
• In the second column, place those private sector partners that we COULD partner with to accomplish our work.
• In the third column, place those community groups or organizations that we COULD partner with to accomplish our work.

Managing in the Fast Lane

• Set aside any cards of organizations whose work does not relate to the work of this Board.

DO THAT NOW!

To evaluate how well our Board is making effective use of our partners, now rearrange each row.

• Place the card with our strongest working partnerships at the top of each row, and the weakest at the bottom.
• If you think of partners that are not represented by these cards, use the blanks to make new cards then insert them in your rows.
• When you are finished, make no more changes to your arrangement.

2. Give Directions for the second card sort.

You will need to stand up for the next part of the activity.

STEP 2	Table Arrangement	Card Arrangement

Combine
Rankings
and Identify
Strongest
Needs
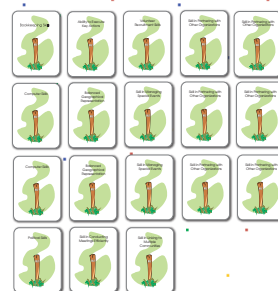
Listen carefully as I DIRECT you to move cards from a SPECIFIC part of your pair sort INTO A NEW ARRANGEMENT IN THE CENTER OF THE TABLE. Our next arrangement will be horizontal.

• Take the LOWEST CARD IN YOUR THIRD ROW and place it in the center of the table. Each pair will place one card in the first row.

• Now move the LOWEST CARD IN YOUR THIRD ROW to a new row under the first row.
• Now move the bottom two cards in the middle row to the center of the table.
• Now move the bottom two cards in the first row to the center of the table.
• Now FOLD UP the remaining cards in your pair sort and hand them to me. **(Here the leader collects all cards, and wraps with a rubber band.)** We are putting these cards aside, as they represent our current strongest partnerships.

3. Give Directions for stacking duplicate cards.

Before we begin the next step, stack identical cards on top of each other, always working bottom to top.

STEP 3	Table Arrangement	Card Arrangement
Move up & Stack Duplicate Cards		
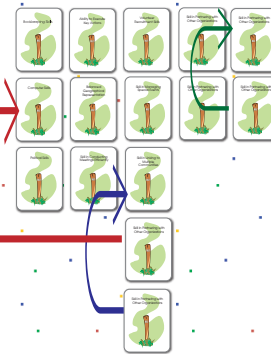
• Start at the bottom of the card sort and move any repeat cards to the higher rows.
• We have now identified a list of organizations that have the potential to help us accomplish our work and meet our collective vision. Let's not move this card arrangement until it is recorded **(Use the worksheet template for Expanding Partnerships.)**

4. Give directions to guide future use of the Potential Partner List.

- We have created a list of organizations—public, private, and community—that have the potential to be new partners for this Board.

- At our next Board meeting, we will first review our work plan, and then review the list of potential partners we have just generated.

- Based on the fit between the work we need to accomplish, and the mission and capabilities of each of these organizations, we will decide which potential partners to approach to propose working together.

WRAP UP

By reaching out to establish new partnerships with other organizations, our Board can extend our human and financial capabilities and better accomplish our stated work goals.

Managing in the Fast Lane

FOCUS ON
KEY ACTIONS

FOCUS ON
KEY ACTIONS

To best use valuable board time, assign only those tasks that accomplish key actions.

ACTIVITY TYPE Charting Roles and Responsibilities

PREP TIME 5 minutes

PREPARATION

Step One: Set the room up to record discussion points.
- Write the board's shared vision on a white board
- Set the conference table up so table tents with shared vision mark each place.

80

20

To reach the efficiency goal of 80 percent of time together focused on key actions (and only 20% of time on board house-keeping and old business), all board members must commit to taking on and carrying out specific responsibilities. These must not be minor actions but must be key to forward movement toward the vision.

- A vision is a compelling idea that has the power to inspire action and motivate the entire organization.

-Action is that work that is done to achieve the vision. accomplish. Work to generate as many visions as you can in a short time. Please use a separate card for each vision.

LEADER NOTES

ACTIVITY TIME   15 - 20 minutes

ACTIVITY ▶

1. Introduce the concept of Roles and Responsibilities.

What exhausts well intentioned boards often comes down to three intertwined dynamics: 1. The range of topics discussed at each meeting is too wide. 2. The same board topics are revisited month after month. 3. 80% of board meeting time is spent on old business, and only 20% on future actions. To keep our commitment to using our time together efficiently, we must put our energies to key actions, and put minor ones on the back burner.

2. Generate Lists. let's create a comprehensive list of all actions from Separating the Vision & Mission Activity (large and small) that will be needed to accomplish our vision.

3. Highlight the actions that are key.

Use a highlighter to emphasize key actions.

4. Assign each key action to one Board Member.

Make a chart with three columns: Key Action, Assign to Board Member, Accomplished Date. Record on Worksheet three.

Key Action	Who Is Responsible	Date to be Accomplished

WRAP UP

We have each committed to a few key actions with a deadline. These next steps will move us directly toward achieving our shared vision.

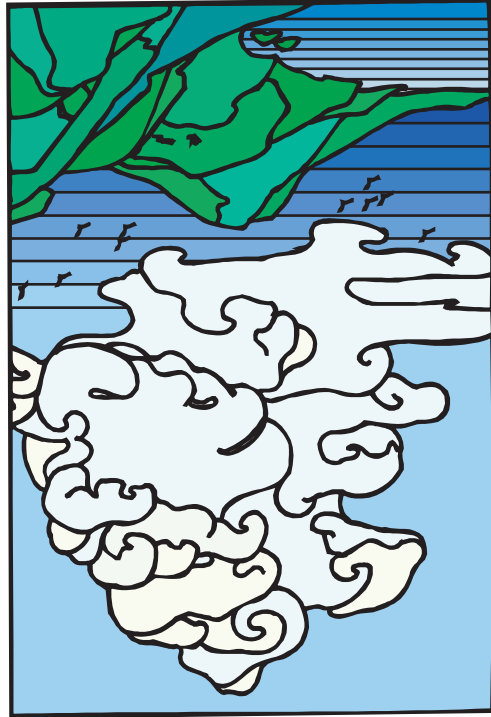*Managing in the Fast Lane*

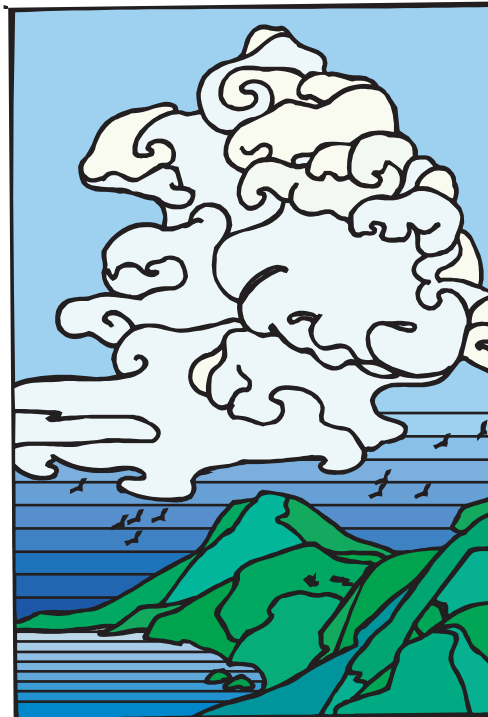# TEMPLATES

33,000 Feet

In The Clouds

Ground Level

Ground Level

In The Clouds

33,000 Feet

Fold along dotted lines to create a tent.
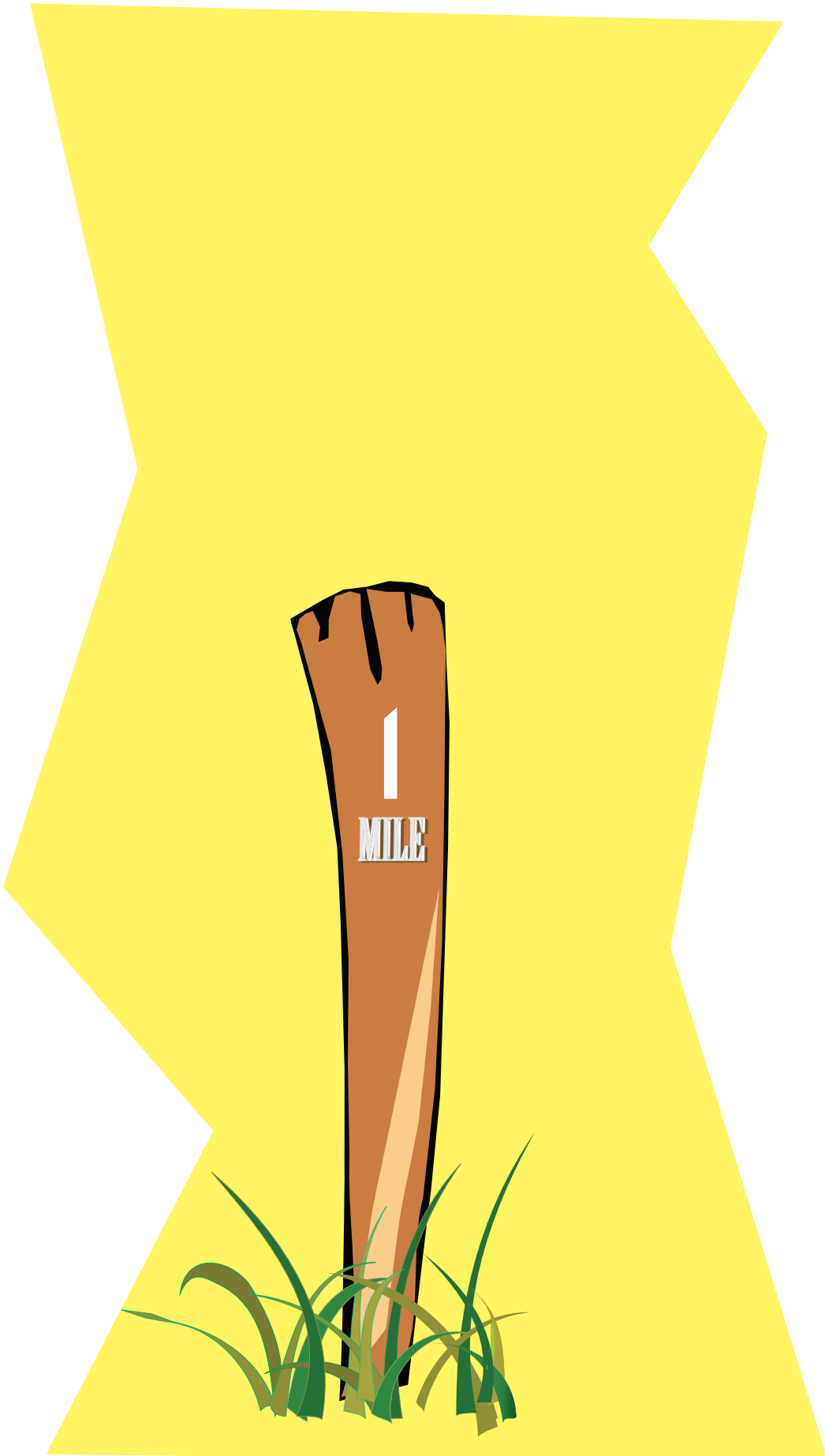
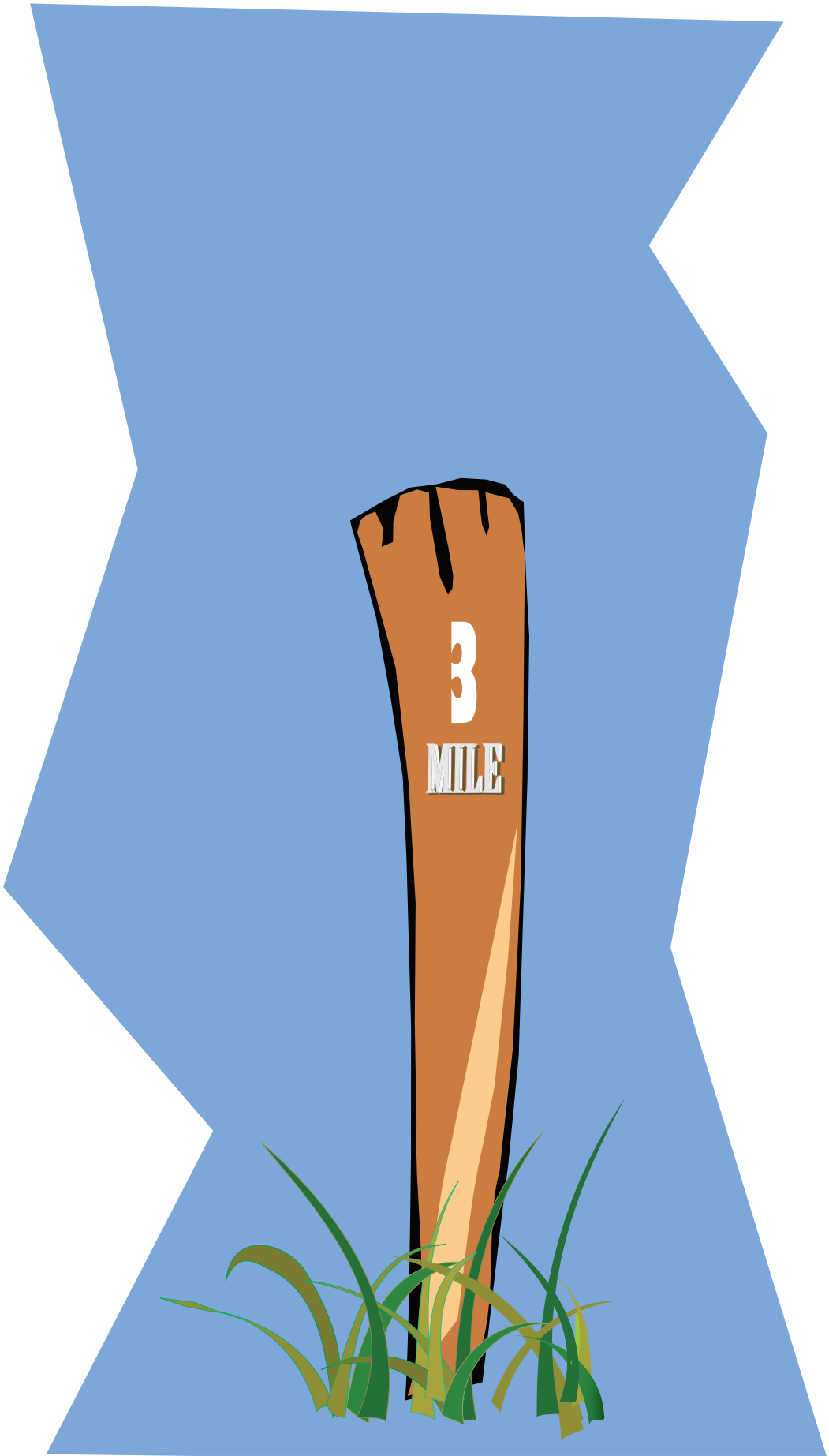*Type in the Vision for your Byway here.*

FOLD

Board Member Name

Scenic Byway
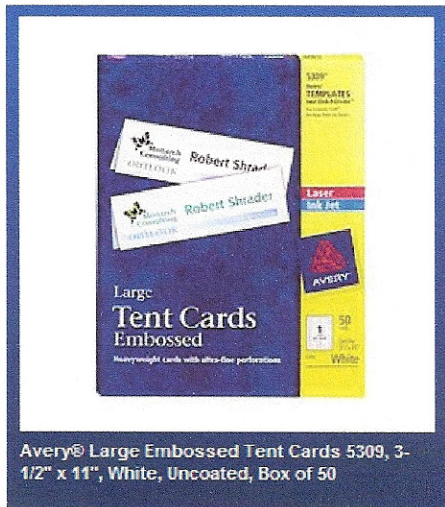
Avery® Large Embossed Tent Cards 5309, 3-1/2" x 11", White, Uncoated, Box of 50

To Order Tent Cards on Line, Go to http://www.avery.com

1. Click on Quick Link: **Find a Product**
2. Browse by Category Products: **Cards**
3. Browse by Product: **Tent Cards** (Order Product Number 5309)

Avery® Large Embossed Tent Cards 5309, 3-1/2" x 11", White, Uncoated, Box of 50

★★★★★
Write a Review

Product Number: 5309

It wasn't just smoke and mirrors; Houdini was great because he had outstanding presentation. Add magic to your presentation with these Large Embossed Tent Cards. These cards feature premium heavyweight card stock with ultrafine perforations for a smooth, clean look. And with free templates from avery.com, you can customize and print them using your laser or inkjet printer. Presto! An awesome presentation in just minutes.

Product Description:
- Laser/InkJet
- White
- 3-1/2" x 11"
- Uncoated
- 1 Card per Sheet
- 50 Total Cards
- Perforated

🔍 **Larger View / More Images**

📄 **View Templates**

- Convenient do-it-yourself tent cards mean that you can make changes and print new cards at a moment's notice
- Heavyweight card stock with ultrafine perforations for a professional appearance
- Design and print from your desktop in minutes
- Print one card per sheet
- Compatible with all inkjet and laser printers

Where To Buy   **Price:** $24.52   🛒 **Add to Cart**

Quantity:

LEADER DIRECTIONS FOR CARD SORTS
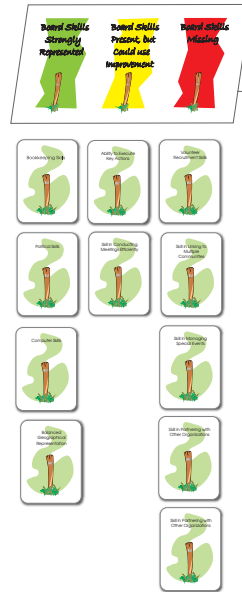
STEP 1	Table Arrangement	Card Arrangement	Directions
Rank Current Situation			Board Members work in pairs with 1 table tent & 1 card deck

STEP 2			
Combine Rankings To Identify Strongest Needs			Pairs move cards to the middle of table Position Strongest Needs on top
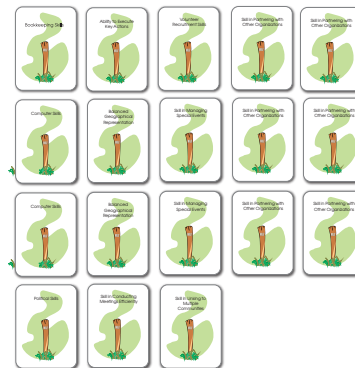
STEP 3			
Move up & Stack Duplicate Cards			Cards remain on table Displayed for Brainstorming & Recording
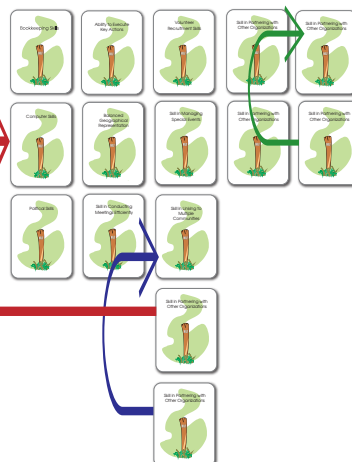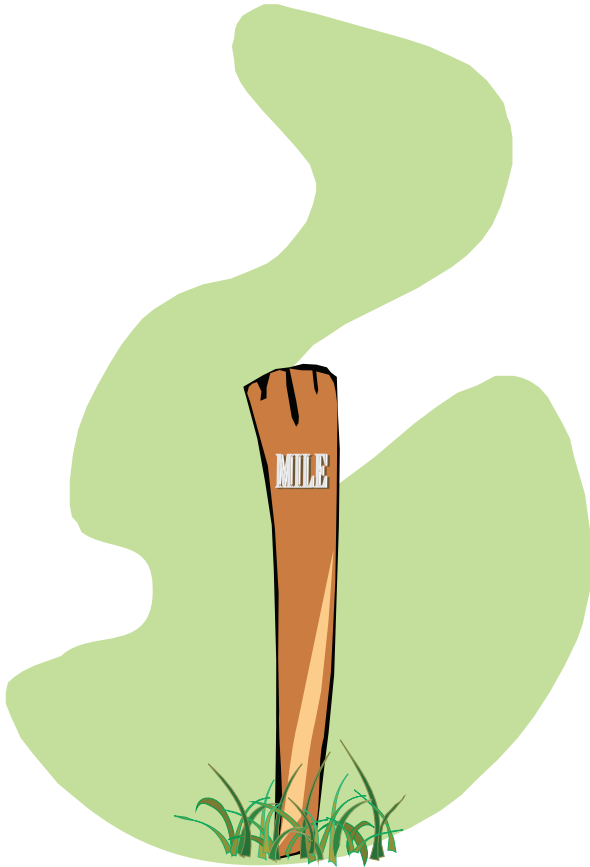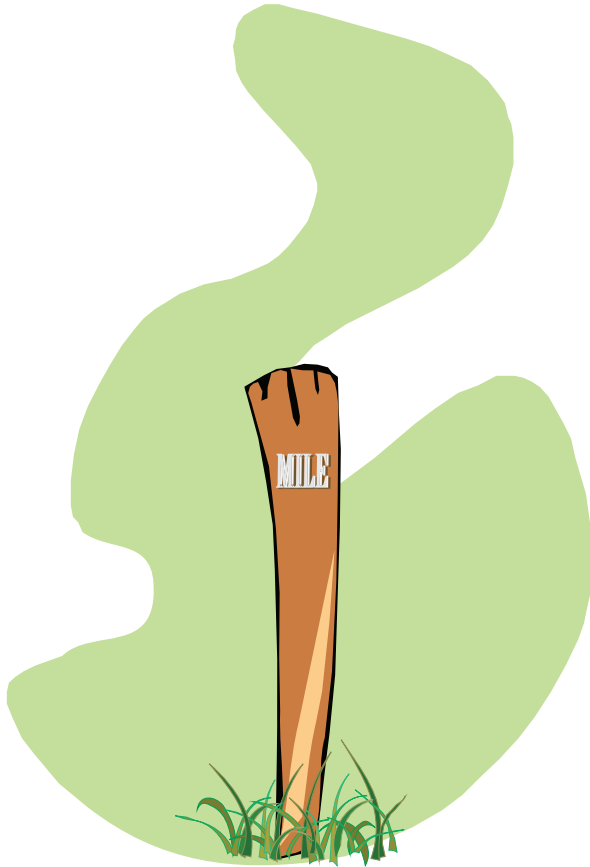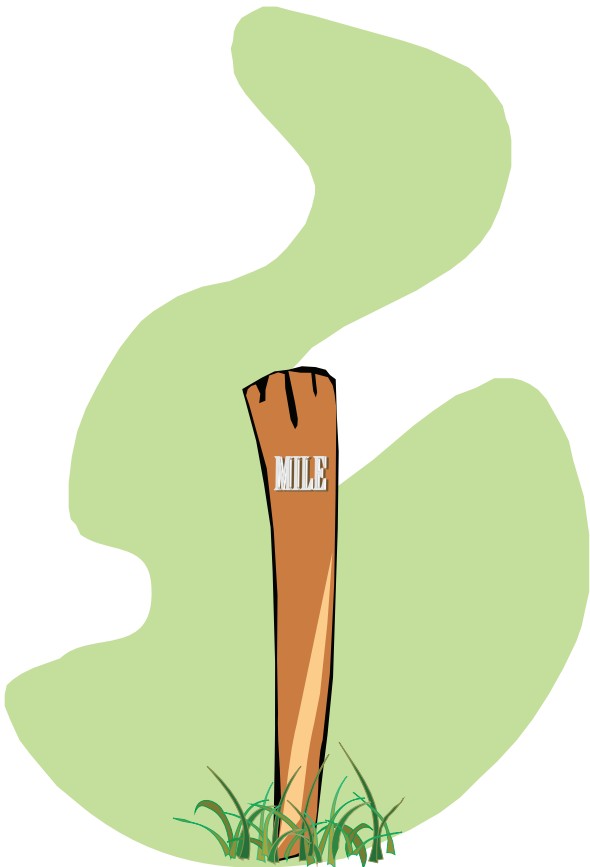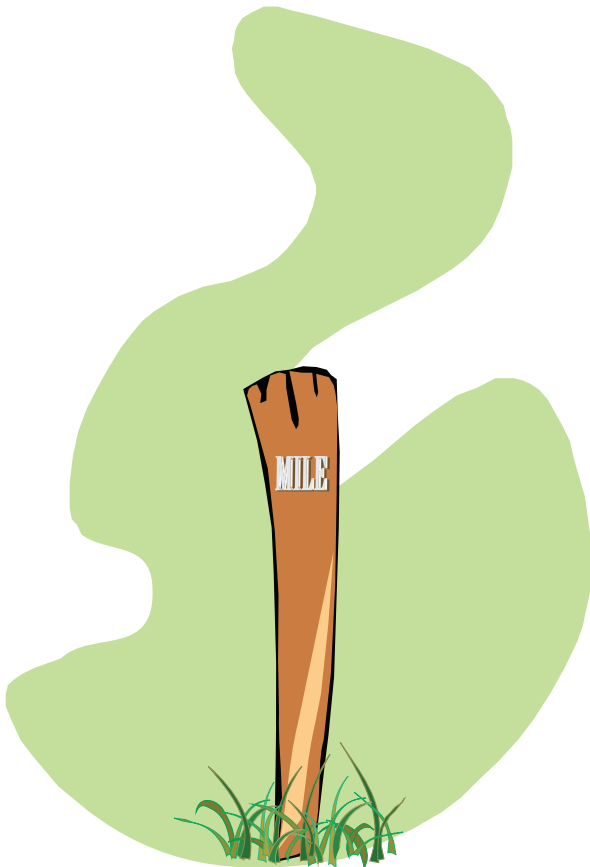
MILE

MILE

MILE

MILE

Board Skills
Strongly
Represented

Board Skills
Missing

Board Skills
Present, but
Could use
Improvement

Board Skills
Present, but
Could use
Improvement

Board Skills
Missing

Board Skills
Strongly
Represented

BOARD SKILLS

Candidates for New Board Members

Skills most needed on Our Board

Community People who possess these Skills

1._____
_____

Name _____
Name _____
Name _____

2. _____
_____

Name _____
Name _____
Name _____

3. _____
_____

Name _____
Name _____
Name _____

4. _____
_____

Name _____
Name _____
Name _____

5. _____
_____

Name _____
Name _____
Name _____

Scenic Byway

Managing in the Fast Lane

Date:

RE: _____ Byway Board Members

Dear _____,

The _____ Scenic and Historic Byway is currently seeking new board members to further their exciting programs for the upcoming year. The Byway is a non profit organization that (mission statement here)

_____
_____

In our efforts to identify energized and talented people, your name came to the surface. We would like to invite you to consider becoming a board member and help us make positive impacts along the _____ Byway.

(What a Board Member does) I.E.: You will be involved in preserving and protecting the natural and cultural resources on the Byway through grant funds and agency partnerships. You will help identify sites for interpretation and develop special events that will share the messages of the Byway Communities with visitors.

(Brief history or purpose) I.E.: The Byway Association was formed in 1995 for the purpose of acquiring grants to preserve and protect the beauty and natural resources along the Byway to the fullest extent that our charter will allow. The Byway Association has attracted more than three-quarters of a million dollars to the area for the propose of enhancing the Byway and the experiences along the road. We hope to focus on creating a noticeable economic impact for the businesses along the Byway.

(Commitment required of Board Members) I.E.: The Byway Association meets once a month for two hours on average. There are sub-committees set up to handle targeted projects and programs. The meetings are typically the third Friday of the month and the location rotates to allow a fair distribution of travel for the members.

We would be honored to have you consider joining our Board. Please contact me at your earliest convenience to discuss your interest.

Sincerely,

Byway Board of Directors, President
Contact Information

Public
Partners

Community
Partners

Private
Partners

Private
Partners

Community
Partners

Public
Partners

1 MILE

1 MILE

1 MILE

1 MILE

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1 MILE
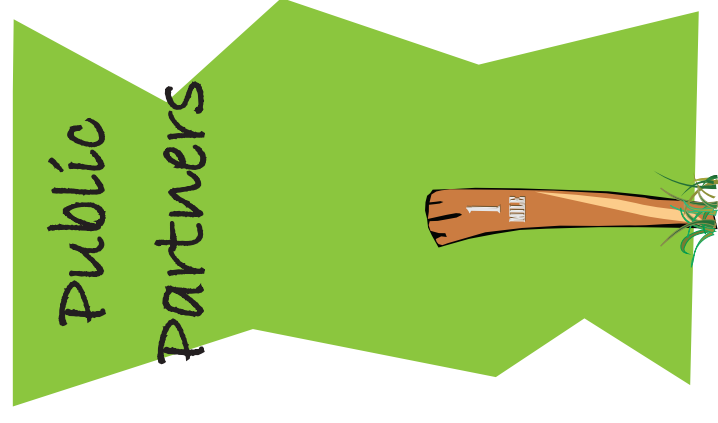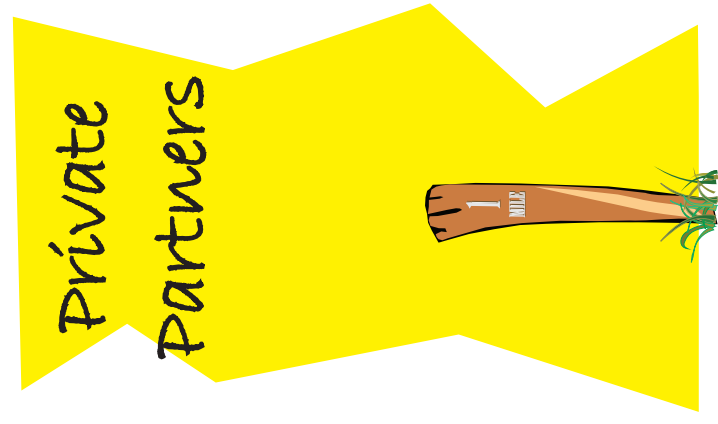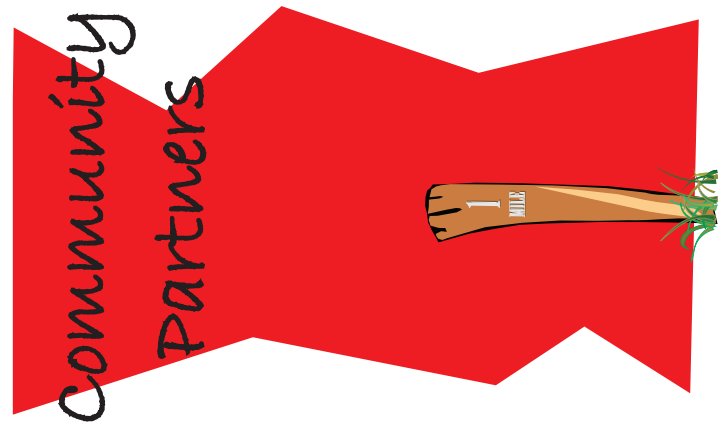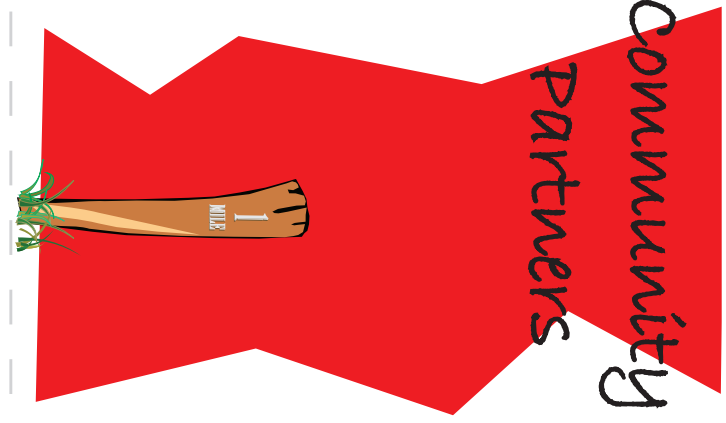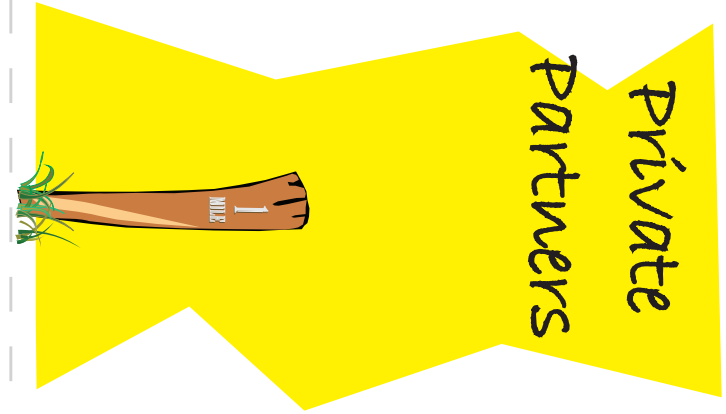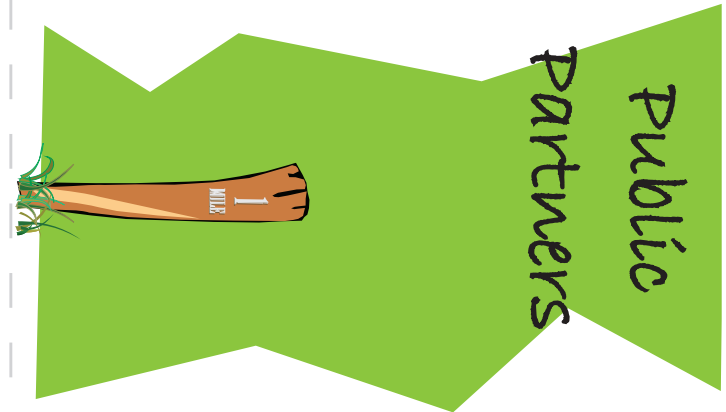
Fold along dotted lines to create a tent.

EXPANDING PARTNERS

Candidates for New Partners

Partnership Assets we need

1._____
_____

2. _____
_____

3. _____
_____

4. _____
_____

5. _____
_____

Partners Who can offer needed Assets

Name _____
Name _____
Name _____

Name _____
Name _____
Name _____

Name _____
Name _____
Name _____

Name _____
Name _____
Name _____

Name _____
Name _____
Name _____

Scenic Byway

Managing in the Fast Lane

1 MILE
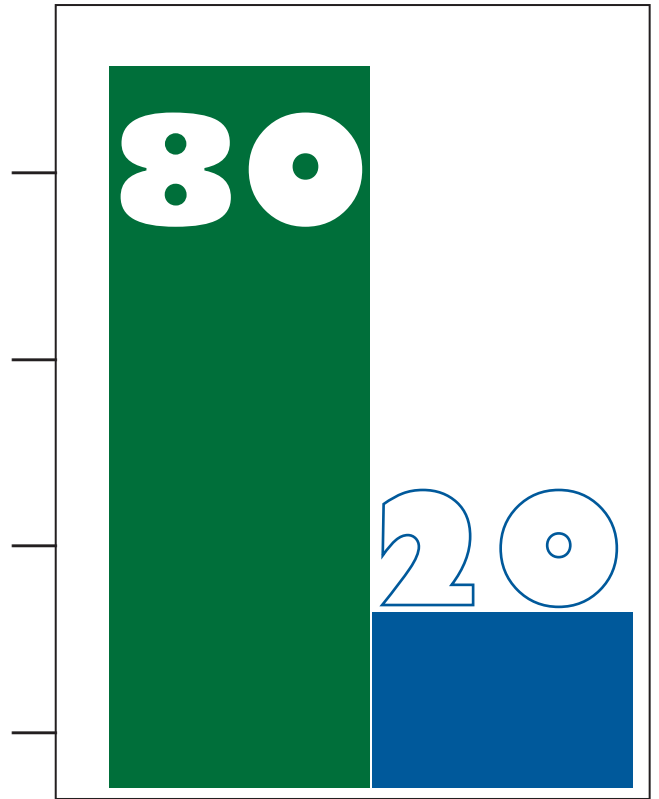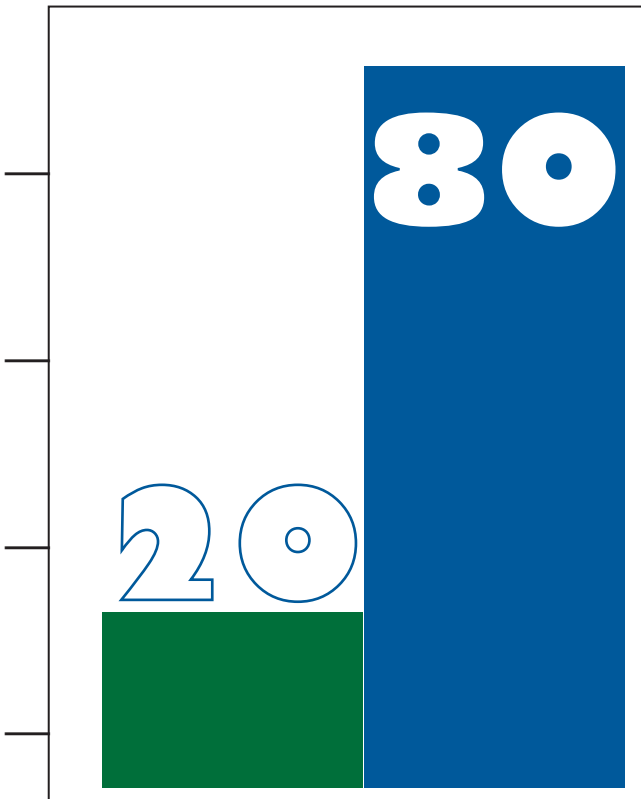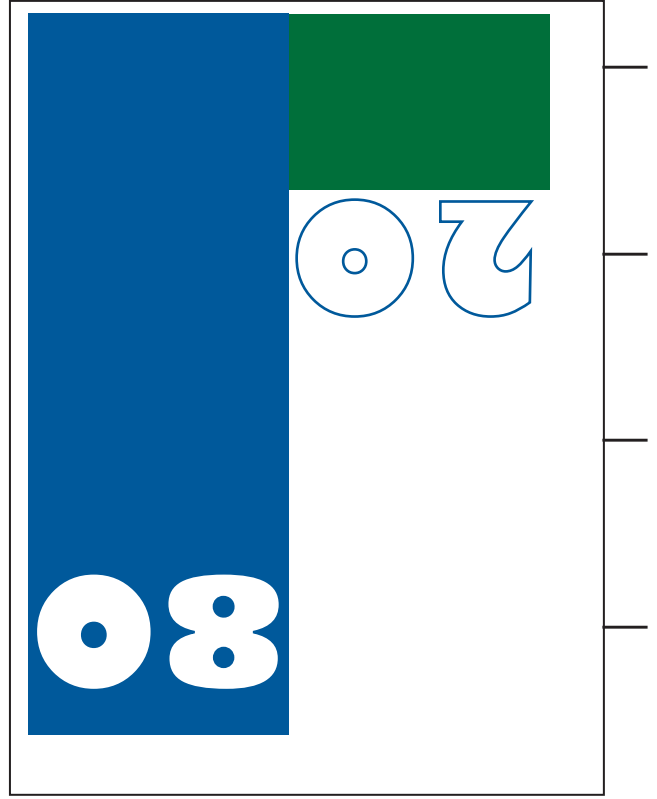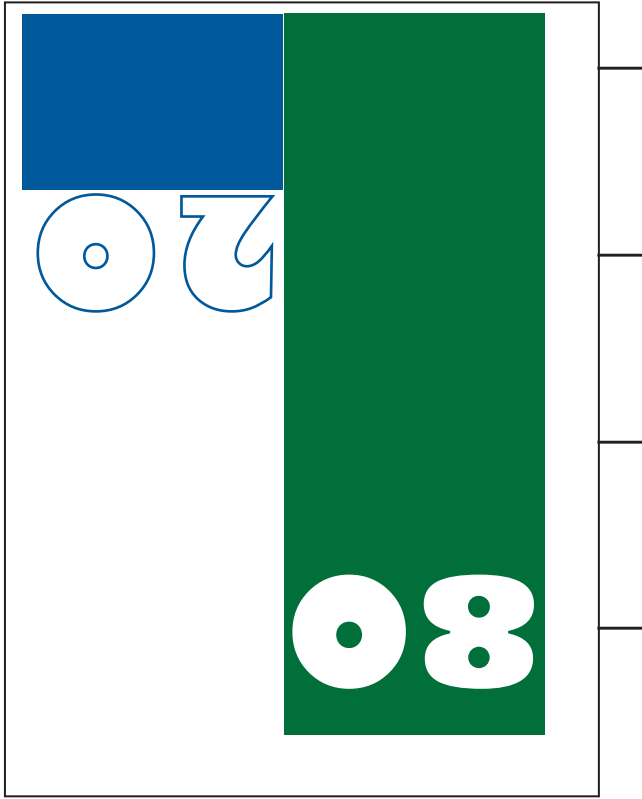
✔ Accessibility Checklist

- People with disabilities (PWD) are the largest growing niche of travelers in the industry.
- 55 million PWD in the U.S. have a disposable income of more than $220 billion and spend more than $13.6 billion per year on travel. *
- They would spend another $13.6 billion if their accessibility needs were met. *

- From Harris Poll and Open Doors Organization

PARKING
- ☐ 1 per every 25 spaces up to 100 located nearest to accessible entrance/path of travel
- ☐ 1 in 8 spots should be "van accessible"
- ☐ Minimum 96" wide w/60" access aisle
- ☐ Proper signage (universal wheelchair symbol)

PATH OF TRAVEL
- ☐ Signage denoting path of travel
- ☐ Curb cuts where necessary
- ☐ Located where parked vehicles don't block them
- ☐ 36" wide
- ☐ Firm & slip resistant
- ☐ Minimum 80" head clearance along path
     No? Then 27" warning barrier required

RAMPS
- ☐ Slope no greater than 1:12 1ft of ramp for every 1" of rise
- ☐ 36" wide
- ☐ 60x60" landing at top and bottom
- ☐ Ramps longer than 6' have railings on both sides 34-38' above ramp, do NOT rotate within fittings

DOORS
- ☐ Threshold 1/2" or less (3/4" for sliding doors)
- ☐ Minimum opening width of 32"
- ☐ Can be opened with closed fist do not require tight grasping, pinching, or twisting of wrist
- ☐ Require no more than 5lbs pressure to open
- ☐ Doormats/carpeting 1/2" thick or less

INSIDE THE BUILDING
- ☐ Aisles are minimum 36" wide
- ☐ T-shaped turning space at end of aisle
- ☐ Tops of service counters (Or section of) 27-34" high
- ☐ Proper leg/knee space at counters & tables 27" high, 30" wide, 19" deep
- ☐ Wheelchair space available at waiting area

KEEP THIS CHECKLIST IN THE GLOVE BOX AND CHECK YOUR BYWAY SITES FOR ACCESSIBILITY

CYCLE GRAPHIC

MANAGE
- Financial Management
- Schedule Management
- Marketing in Place
- Project Overviews

ASSESS
- Vision is Obvious
- Project/Event met Goals
- Adjustments in Planning
- Board is Moving Forward

IMPLEMENT
- Develop RFPs
- Project/Event Details & Tasks Identified
- Develop Work Calendar
- Contracts Issued

PLAN
- Visioning
- Marketing / PR Plan
- Business Plan
- Corridor Management Plan

BOARD

Training Kit Project for Rural Non-Profit Governing Boards

LITERATURE and PROGRAM REVIEW ON RURAL BOARD TRAINING

July 28, 2009

I. Introduction

Project Purpose

The overall purpose of this project is to develop and distribute a training kit for rural boards that establishes a continuum of organizational development skills, and that establishes a method for rural non-profit governing boards to effectively manage their organizations.

The aspect of the larger project covered by this particular piece of work is to review the literature associated with rural training, leadership and other relevant topics. This literature will serve as a foundation from which to develop the curriculum for the rural non-profit boards.

Ideas Shaping the Training Program

From the beginning, it was clear that the trainings should follow some general guidelines and as such, should be:

- consultant-free,

- designed for small chunks of time (e.g., 15-30 minutes per session versus hours or days), and

- designed to be used in small groups.

In addition, other factors shaped the literature review and recommendations:

- Beware the common assumption that runs through much training: *get the board the working well internally and the rest of the community development work will just come easily*.

- Acknowledge that the 'Petunia Effect' will be in play at times, wherein groups choose the easy project (i.e., planting the flower that will grow easily versus the more difficult plants) or perhaps choose group improvement work over community development work.

- The program must offer both personal relevance and community relevance in order for individuals to participate. The activities should try to strengthen both the person and the community.

A Self-Administered Evaluation Tool

In addition to the objective of laying a foundation of literature and thinking from which to develop the curriculum, this project also explored how an evaluation tool might be utilized. The purpose of evaluation tool is to provide all of the participating byway groups a sense on where they stand today on the critical issues related to the efficiency and effectiveness of their boards, and introduce concepts covered in the training program.

II. Overview of the Training Landscape

A. Method

Identifying relevant programs, research and literature for this project used several methods:

- Web review for key authors and articles on the key words and phrases such as the following: rural board training, rural nonprofit board training, rural leadership training, nonprofit board training, board effectiveness, rural leadership, and related terms.

- Assessment of major literature reviews already performed on closely-related topics.

- Reviews of journals with connections to this topic.

- Web research on relevant training programs around the U.S. and in other English-speaking nations.

B. Rural Challenges Shaping Board Performance and Training

As a part of the above work, we kept note of the themes in rural America that have shaped the type of leadership programs that have been offered since the 1940's. During the last 50 years, the same basic problems in rural areas and in volunteer boards have been attacked from various directions. All are relevant for this project and are noted below

- Most of the basic challenges facing rural areas have changed little in 50 years:
    - Net out-migration of youth and adults seeking greater opportunities
    - Shrinking agricultural primary sector (e.g., farms and ranches) and secondary agricultural sectors (e.g., equipment dealers, etc.)
    - Erosion of national retail and service profit margins that allowed rural retail businesses to stay competitive (i.e., the Walmart-ization of retailing)
    - Increasing health care costs; decreasing access to health services
    - Declines in the rural, small-firm manufacturing sector
    - Stiffer competition and corporate consolidation in the resource extraction industries
    - Interstate construction resulting in easier access to some rural areas (e.g., beach and mountain resorts) and also the bypassing of downtowns in other rural communities. This created some winners and some losers.
    - Influx of new immigrant groups to rural areas raising issues of integration and cultural understanding.

- Some of the above challenges have resulted in economic consequences that have been sufficiently severe to merit local people taking action to address the challenges. Generally speaking, as local groups work to address these problems, there were similar initiatives at the state and federal levels.
  - Lower population levels
  - Fewer jobs
  - Fewer well-paying jobs
  - Decline in the number of college educated people in rural towns
  - Downtown decline
  - Less overall wealth in communities and thus fewer funds to support civic activities

- As federal, state and local groups and agencies sought to address these challenges, it became clear over time that those on the front lines (i.e., local groups) ran into a variety of challenges, relative to the efficiencies of their local groups.
  - Lack of experienced leadership
  - Too few board members
  - Small population base from which to draw members
  - Too much turnover and burnout
  - No project management skills
  - Personality conflicts
  - No funds to hire assistance
  - Lack of fresh ideas on how to get an organization moving forward
  - Absence of critical skills among board members
  - Mission of board is not conveyed to public
  - Board mission is not seen as critical or relevant to community
  - Reluctance to raise funds
  - Service area is too poor to generate funding to support the board
  - Inability to focus on big picture
  - Inability to get things done
  - Inadequate partnerships
  - Failure to find grant funds
  - Failure to raise matching funds
  - Lack of sophistication to interact with external urban markets from which most business will come

In addition, the nature of rural areas is that people are dispersed and long distances are traveled to participate in meetings. This fact of life exacerbates many of the above challenges.

Four General Themes in Training Programs

In response to the above challenges, non-profit board-oriented research and training has moved through four phases over the last five decades:

1. *nuts and bolts* or *governing* (i.e., making sure that groups are structured well and can do the basics of managing their organization.)

2. *group dynamics* (i.e., understanding the interpersonal and structural problems that can hinder successful groups.)

3. *leadership* (i.e., building the personal qualities that make one an effective member of a group and able to lead the efforts for which you are responsible.)

4. *local-reliance* (i.e., an emerging federal focus on encouraging communities to build their internal abilities to support organizations.)

A Sector Emerges 1960's and 1970's see expansion of non-profit, quasi-public sector groups (Great Society programs.) Research explores general role of citizens in public policy, planning and community development.	**Governance or the *Nuts & Bolts*** 1970's and 1980's research and training programs support proper legal structure, organizational structure, meeting management and similar issues.	***Group Dynamics*** Business schools and thinkers analyze effective private organizations, leaders and successful individuals. By the 70-80's, this crosses over into the community development field and group dynamics is the new focus.	***Leadership* Model** 1980's and 1990's see explosion of 'leadership training' funded by foundations and Cooperative Extension. Focus is on how the qualities of leadership can be instilled into all members of community groups.	***Local Reliance*** Finance, faith and partnerships are new themes in federal efforts. Skepticism of old CAC models drives training in local-reliance, wealth building and entrepreneurship

The promise of, and then the skepticism of, government's ability to solve problems, and the consistent belief in local residents' ability to address their own problems, have shaped the public policies that impact rural communities and their non-profit organizations.

Starting in the 1960's, there was great hope that government-sponsored liberal Great Society agencies could address poverty, housing, economic development and community development. (In the realm of rural development, programs such as the Appalachian Regional Commission exemplify this policy.) The thinking was that outside experts working in tandem with local leaders could address local problems. And, in varying degrees — ranging from none to significant — they did.

During the 1970's and 1980's, conservative thinkers and elected officials questioned the institutionalization of government-sponsored agencies. They felt that community development should be driven by local people, not representatives of state and federal agencies. They opposed the inefficiencies — ranging from none to significant — that these agencies represented. They also felt that faith-based organizations should play a stronger role in community development and have access to federal funding.

Throughout this time period, there has been a shifting sense of what government can accomplish and how it should intervene in local affairs. *There has also been a consistent belief that local residents can and should shape their affairs and control community development.* Those of liberal persuasion felt that government-sponsored agencies provided critical technical assistance that supported local efforts, built local capacity, and which provided the manpower to get things done. Those of conservative persuasion believed that government-sponsored agencies used too many funds for administration, imposed federal-government biases on local groups, and prevented citizens from really taking control and responsibility for community development. They seek a return to an emphasis on local control, volunteerism and civic duty.

Where are we today?

Our main observation from categorizing and considering the above trends is that each phase of board training was addressing a real need and that those real needs all still remain. In other words, as time has passed, there is no less need for the nuts and bolts skills that were the primary focus of board training in the early years, but there has been a gradual universal acknowledgment that more emphasis should be placed on the board's dynamics and as well as on the skills of the individuals serving on the board. That trend continues today.

Next, the current thinking regarding the real needs for not-for-profit boards has always been intertwined with the current federal and state thinking regarding rural development and the supporting government mandates and incentives. Most federal and state policies flow from current theories on how to address rural and not-for-profit board challenges. And inversely, for most training programs to succeed, they need federal or

state funding. In other words, theory and practice tend to depend on each other. Today is no different on that front.

Finally, there has been a steady pattern of information developed in the private sector gradually flowing into the public and not-for-profit sectors. That is, themes from current private sector thinking about how to educate and train will soon become the accepted themes in the public sector way of thinking about the educating and training.

What are the next trends in training?

Several issues are impacting new training trends:

1. *Human potential* is a concept that takes individual-focused training to its next level. While the huge self-help industry has its share of wacky fringe concepts, the success of the industry (e.g., TV, video, listening programs, books, internet sites, workshops and classes) and the integration of many of these personal development concepts into the corporate sector (e.g., wilderness group skill development, listening skills, positive thinking, visioning) speak to the underlying value of some of the concepts in this movement.

2. *Entrepreneurism* is a concept that flooded the private sector and the mass media learning industry. Behind this is the emphasis on taking personal initiative to venture into business, or to take personal risks and individual initiative within one's job or life.

3. *Coaching* is a recently emerged, effective model in business and in personal life change programs. It is now moving to the non-profit sector.

4. *Internet-based training or e-learning* is becoming widely adapted in all sectors.

5. *Blended learning* is a term referring to the integration of various modes of training.

6. On the policy side, in response to new federal priorities and funding, *training is now emerging to address faith-based organizations, wealth-building and asset-building strategies*.

Consultant-free training was identified as a theme for this project. Objectives of this program are to find ways to give local boards more responsibility for their own training, to decrease the costs on a per-board-training basis, and to address the real challenges of distance. Preparing a training program that could be flexibly used by rural boards without the need for on-site consultant assistance addresses these objectives. If one considers the above six trends in training, it is clear that the consultant-free model can mesh with most of these trends.

III. Training Topics

A. Training Topics in Governance (or the Nuts & Bolts)

Governance consists of the basics of making an organization work. Many of these issues are affecting Colorado byway groups today.

There are literally hundreds of businesses and public programs covering governance training. We reviewed the following organizations' curricula content based on either the length of the program's existence or due to some novel aspect of the program:

- BoardSource – consultancy
- Arizona Dept. of Commerce – has trained boards throughout Arizona
- Community Resource Center – Colorado based non-profit leadership and management program
- Authenticity Consulting
- South Carolina Center for Grassroots and Non-profit Leadership
- Southern Rural Development Center
- United Way of NYC
- Dorothy A. Johnson Center for Philanthropy and Leadership
- LSU AgCenter – Rural board training
- Fieldstone Alliance - consultancy
- Institute on Governance
- Voluntary Gateway

Typical *governance training* topics are:

- Board roles and responsibilities
- Building and training the Board of Directors
- Identification, recruitment, orientation of board members
- How to maintain effective board leadership
- Board-staff relations
- Board meetings
- Managing committees
- Board member motivation, responsibilities, accountability
- Role of Chief Executive
- Basic management and leadership skills
- Managing ethics
- Supervising employees and volunteers
- Conflict resolution
- Board Diversity
- Legal responsibilities and risk management
- Fiduciary responsibilities and financial management
- Marketing
- Strategic planning
- Assessing goals, vision

- Developing a fundraising plan
- Developing and marketing programs
- Designing program evaluation plans
- Corporate partnerships
- Developing a business plan
- Grant writing fundamentals and practices
- PR and use of media: managing your organization's image

There appear to be few training trends associated with this material. Research tends to support the obvious idea that the more a board has these issues under control, the more successful the board can be.

The challenge for rural byway boards is that this material can be pretty dry and people with limited time may not want to spend much time training on these topics. New delivery methods that condense the material might be an important tool.

B. Training in Group Dynamics and Leadership

Programs all across the nation and world, in both the public and private sectors, identified the need to understand, encourage and train people to understand how their groups work and to become stronger leaders so that organizations can thrive. This line of thinking goes back almost 50 years but has been refined in the last two decades.

Several concepts are important in this field.

- Co-leaders and Co-learners: though board success may depend on one major leader, it is more likely to rely on the role of many co-leaders and co-learners.

- Changing roles of community leaders: Due to the increased complexity of problems facing boards today and at people don't want to be docile followers, this has led organizations to have many co-leaders. Training acknowledge and encourages this trend.

- Dispersed leadership: The business and organizational thinker Peter Drucker developed this concept. It helps people understand that effective organizations have leadership dispersed throughout the organization.

- Servant leader: The servant leader is a volunteer for community development, who sees his or her role as one of both leading the community toward success as well as serving the needs of the community.

- Mentorship

- Self-study and practice

- Community leadership programs- Michigan State model

Foster trust, respect, diversity
Vision
Expand collective thinking and learn together
Stimulate action and leadership by doing

- Community Trusteeship - National Association of Community Leadership
     Another term that is essentially the same as above concepts
     Hold community in trust
     Act on common good
     Rooted in past, present and future

- Civic Entrepreneurship
     This is another term of local leaders who can get things done in
     the public/civic sector. Most training for civic entrepreneurs
     appears to be the same as for leadership development.

Training Topics for the Leadership Model

The following leadership training programs were reviewed:

Organization/Title	Website
AgriLead	Agrilead.org
The Center for Rural Leadership	www.ruralleadership.ca/programs.aspx
BoardSource Extraordinary Board Leadership: The Seven Keys to High-Impact Governance	www.boardsource.org Publication; Author: Doug Eadie
The Institute on Governance Voluntary Gateway	www.iog.ca www.voluntarygateway.ca
RUPRI/Rural Governance Institute	www.ruraleship.org
Arizona Dept. of Commerce Community Resource Center	Azcommerce.com www.crcamerica.org
Authenticity Consulting South Carolina Center for Grassroots and Non-profit Leadership	www.managementhelp.org Sclc.clemson.edu
Southern Rural Development Center	Srdc.msstate.eduhttp://srdc.msstate.edu/
United Way	www.unitedwaynyc.org
Dorothy A. Johnson Center for Philanthropy and Leadership	www.npgoodpractice.com
LSU AgCenter	www.lsuagcenter.com
Fieldstone Alliance	www.fieldstonealliance.org
U. of Kentucky College of Agriculture	www.ca.uky.edu/agc/pubs/ip/ip54/ip54.pdf
National Center For Small Comunities National Council of La Raza	www.natat.org/NCSC/ www.nclr.org
Pennsylvania Rural Leadership Program (RULE)	rule.aers.psu.edu/

The Center for Rural Leadership	cals.arizona.edu/centrl/#Misson
North Carolina Rural Economic Development Center, Inc.	www.ncruralcenter.org/leadership/institute.htm
Australian Rural Leadership Foundation	www.rural-leaders.com.au/
Farm Foundation	Farmfoundation.org
Wisconsin Rural Leadership Program	www.uwex.edu/ces/wrlp/
Center for Rural Policy and Development	www.ruralmn.org
Kansas Agriculture and Rural Leadership (KARL) Curriculum	http//www.oznet.ksu.edu/karl/
Iowa State University – Community Vitality Center	www.cvcia.org

Based on these programs, the typical topics taught in rural leadership programs cover the following:

- Participants learn to better know themselves through journaling, role plays, leadership style inventories (e.g. Myers-Briggs, feedback from groups and mentors and exercises that clarify values and ethics.

- Basic understanding of organizational dynamics.

- Analytical and critical thinking skills taught through problem solving exercises.

- Challenges facing the community are taught through strengths, weaknesses, opportunities and threats (or similarly focused) exercises.

- Community's future needs and its potential explored through visioning exercises.

- Develop *internal-group* and *external-group* public skills through role plays, on-site discussions, panels with open-ended questions, personal interviews, learn to reframe problems, and learn to explore trade-offs.

  Specific internal group and internal community public skills to focus on include: active listening, framing issues, collaboration, conflict resolution, decision-making, deliberation, evaluation, facilitation, imagination, interviewing, negotiation, power analysis, strategic planning, team building, vigilance and volunteer management.

  Specific external-group and external-community skills to learn are defining local social and other capital, stakeholder analysis, mobilizing local resources, networking, working with the media, community diversity and multi-culturalism, public speaking and partnerships.

- Curricula focus on *learning through doing*. Exercises and lessons push the group to accomplish something.

C. Programs and Writings Offering Relevant Lessons

Catalytic Community Development from *Challenges for Rural America in the 21st Century* (Rural Sociological Society)

- Characteristics:
  Capacity building
  Empowerment
  Collaboration
  Expanded Locus of Activity
  Open Access to Information
  Comprehensive Not Categorical Areas of Action

- This approach generally puts a new name on the same, basic things that community developers have been doing for years. The new shift is on the idea that a professional community developer should put effort into managing local capacity and resources and less on 'doing things'.

- The weakness of this concept is that in rural areas with mostly volunteers available, no one has time to push forward the 'doing things' that must be done. Having professional staff available to 'do things' is critical. Thus this concept, in our opinion, is naive.

A Notable Exception: The Australian Rural Leadership Program

In their typically practical frame of mind, the Australians have for 12 years run a rural capacity development program that has supported the development of some of the country's major rural policy players, entrepreneurs and organizations.

The program covers all of the topics noted above as well as *the economic and governmental factors that rural leaders must understand to guide their communities*. Topics include the dynamics of the major industries impacting their regions including global competition, marketing, research and development, production issues, natural resource challenges, regulation, public policy and foreign trade.

With the exception of U.S. programs focused on specific business sectors (e.g., specific farmer programs, etc.) and on overall entrepreneurship (and most of these programs do not dive into the broader economics impacting an area), this integration of the broader economic climate into the organizational issues is important to note.

If a local board member understands the major industries and trends, he or she will be more successful in cultivating a healthy local economic climate. This is relevant for larger industrial sectors as well as for the small business sector.

Perspectives from Governance as Leadership

Governance as Leadership: Reframing the Work of Nonprofit Boards by Richard Chait, William Ryan, Barbara Taylor, Wiley and Sons, 2005

Four Questions that Motivate the Work:
1. Why is there so much rhetoric that tours the significance and centrality of nonprofit boards, BUT so much empirical evidence that boards are only marginally relevant or intermittently consequential?

2. Why are there so many "how-to-govern" handbooks, pamphlets, seminars and workshops, BUT such widespread disappointment in board performance?

3. Why do nonprofits go to such great lengths to recruit the best and brightest as trustees, BUT then permit these stalwarts to languish collectively in an environment more intellectually inert than alive, with board members more disengaged than engrossed?

4. Why has there been such a continuous flow of new ideas that have changed prevailing views about organizations and leadership, BUT no substantial reconceptualization of nonprofit governance, only more guidance and exhortation to do better the work that boards are traditionally expected to do?

There are Three Modes of Governance, All Created Equal:
> **Type I**—the fiduciary mode where boards are concerned with the stewardship of tangible assets

> **Type II**-the strategic mode where boards create a strategic partnership with management

> **Type III** the generative mode where boards provide a less recognized but critical source of leadership for the organization

D. Conclusions from the Training Topic Review

1. Training for non-profit boards has expanded from governance to leadership with many variations on these themes.

2. Coaching, self-help, and local-reliance are new concepts that may have relevance to this project.

3. A consultant free model addresses recent public policy themes of local-reliance and cost-efficiency.

4. The potential list of topics that one can train a non-profit board is very long. How should we narrow down the list to the topics that are most relevant to the boards?

5. If the ultimate goal of the state byways program is economic development and/or resource management out on the road and in the community, what types of training topics can best help with that?

6. There are many organizations in the country doing training, thus demonstrating that many people want to be trained and will put in the time and money to do it. There is little research on what works and what doesn't work. This is likely due to the very broad range of topics and the many variables that differ between groups. One study noted that the most common concerns of rural volunteers was lack of time and lack of knowledge. Training should help address that issue. Turnover and burnout dilute the effectiveness of rural training.

7. The most important decision to make at this point is to attempt to define the three most important problems to address in training. We must find focus for this program.

IV. Highlights from the Research

In reviewing the literature, some research findings were most relevant for this project.

1. One of the oldest and longest studies on training rural boards and leaders was the Kellogg Farmers Study Program. The work began in 1958 in Michigan and was expanded to five states from 1965 to 1972. The program sought to help farmers identify problems and analyze alternative solutions, develop skills in problem analysis and critical thinking, a broadened knowledge of public issues and rural America, and to instill a motivation for life-long learning. As time passed, the Farmers Study Program evolved into the Kellogg Rural Leadership Development Program.

2. The journal, *Rural Sociology*, published by the Rural Sociology Society of America, is the oldest academic journal covering rural issues in the United States. To our surprise, this journal had very little research on rural training and leadership.

   - *Theory and Methods of Training for Community Development.* Polson, Robert A. v23n1 1958.This article from 1958 emphasizes the same training topics that are noted today ranging from technical skills to the ability to deal with people and resolve conflict.

   - *Board Members as Decision Makers in Farmers' Co-operatives.* Folkman, William S. v23n3. 1958. The main relevant point from this article is that boards must be diverse. If they are not representative of the range of people in the community, there will be a tendency for the board to make decisions influenced by the social and friendship connections held by board members.

   - Other articles emerging from our searches tended to focus on developing systems to measure communities with little comment on what types of training and organizing really works.

3. *Designing a Rural Leadership Program and Curriculum.* Hustedde, Ronald J. and Angie Woodward. Cooperative Extension Service: University of Kentucky, College of Agriculture. Publication IP-54. This is one of the few articles found that analyzed rural leadership and used that analysis for its program development. A major emphasis is on the need for leaders in rural communities and on the trend toward shared leadership rather than individual leadership. This program cites the Michigan State University Extension community action leadership program which used four criteria for shaping its training programs:
   - Fostering trust, respect and appreciation of diversity in community,
   - Developing a vision of what a group wants to become,
   - Stimulate 'learning communities' where people expand their collective thinking and learn together, and

- Stimulate action and encourage leadership by doing.

4. The *Journal of Extension* captures much of the innovative programming from the U.S. Cooperative Extension Service. Noteworthy articles are the following:

- *Cooperative Director Training: Changing the Way Extension Programs Are Presented* . Hine, Susan, Joan Fulton and James Pritchett. June 2005. Volume 43 Number 3. Article Number 3FEA3. Findings emphasized the value of interactive exercises, hands on problems, case analysis and follow-up connection between cooperative directors.

- *Characteristics of Effective Training: Developing a Model to Motivate Action.* Wize, Dena, and Patsy Edzill. June 2003. Volume 41 Number 2.

  As expressed in the article: *In general, extant writings support the work of Malcolm Knowles' (Knowles, Holton, and Swanson, 2000) andragogical approach to adult learning. Andragogy is based on the following assumptions:*
    - *Adult learners bring life experiences to the learning process that should be acknowledged.*
    - *Adults need to know why they need to learn something, and how it is relevant to their lives.*
    - *Experiential, hands-on learning is effective with adult learners.*
    - *Adults approach learning as problem-solving.*
    - *Adults learn best with the topic is of immediate value to them in their lives.*

5. Notes from *Blended Learning: Reinforcing* Results by Jeff Snipes at http://www.clomedia.com/content/templates/clo_article.asp?articleid=1070&zonei d=25   (Downloaded July 2006). Mr. Snipes cited a variety of research projects, which are cited below.
    - Research Institute of America found that 33 minutes after the completion of a classroom course, students retain just 58% of the material. By day two, only 33% is retained and three weeks after the course, just 15% is retained.

    - Similar studies found that 87% of material is lost from a course within 30 days unless coaching occurs.

    - In *Blink*, author Malcom Gladwell discusses the idea of *thin-slicing* or filtering the very few factors that matter from an overwhelming number of variables.

    - Blended learning typically uses a mixture of technology, classroom, self-paced and group learning. Figure 2 from Snipes article (reproduced below) indicates that various techniques can significantly improve the retention and impact of learning. The most powerful techniques are making students practice retrieval of information and encouraging meaningful repetition of the material. (Material from Will Thalheimer
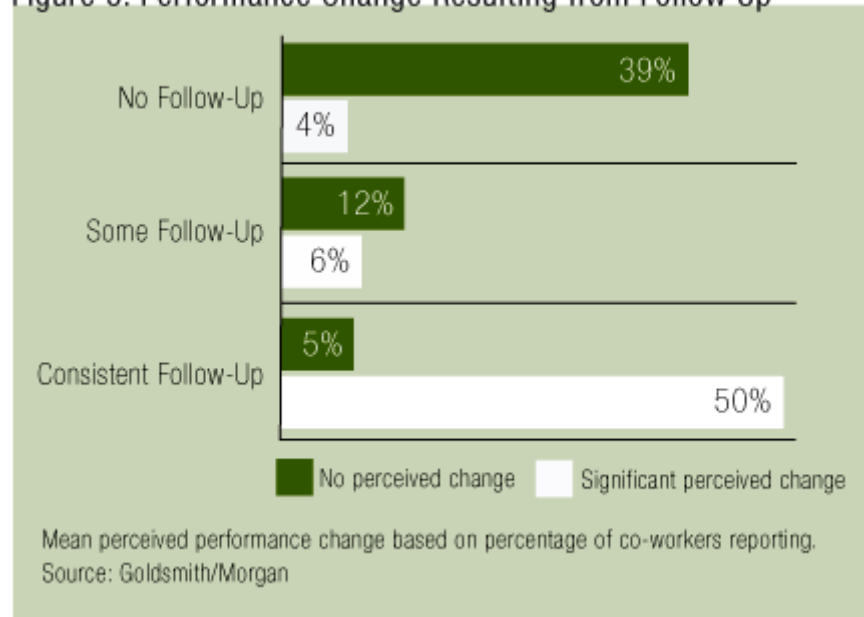
Work-Learning Research IDC in American Society for Training and Development: *Research to Practice Conference Proceedings 2005.* Downloaded July 2006 from http://www.astd.org/NR/rdonlyres/462D84C4-4077-4242-84DD-8C08BF236599/7113/R2P_Proceedings_v7.pdf

Figure 2: Key Blended Learning Principles
Proven to Improve Performance Impact

Learning Principles	Improvement in Performance Impact
Aligning learning and performance contexts	Up to 55%
Providing retrieval practice and testing	Up to 100%
Using appropriate feedback and schedules	Up to 50%
Prompting meaningful repetition	Up to 110%
Spacing repetitions and practice over time	Up to 40%
Avoiding the addition of distracting elements	Up to 50%
Appropriately using learning objectives	Up to 45%

- A study by the Huthwaite Research Group found retention increases up to four times higher when training is seen as highly relevant to one's job.

- Follow-up is critical to learning, as indicated below in another of Snipes graphs. As reported by Goldsmith/Morgan (in *Leading Organizational Learning* – see bibliography) consistent follow-up resulted in much higher levels of perceived improvements in leadership abilities (as perceived by fellow workers). No follow-up resulted in 39% of fellow workers seeing no change in leadership; consistent follow-up resulted in 50% of fellow workers seeing improvements in leadership.

Figure 3: Performance Change Resulting from Follow Up

No Follow-Up: 39% / 4%

Some Follow-Up: 12% / 6%

Consistent Follow-Up: 5% / 50%

No perceived change   Significant perceived change

Mean perceived performance change based on percentage of co-workers reporting.
Source: Goldsmith/Morgan

- That same work emphasized two points:
  - learning is a process that should occur over time rather than be a one-time event (e.g., a workshop or one-day training)
  - learning requires a relationship in which the trainee is accountable to someone for the information received in the training (e.g., reporting to a superior or to peers.)

- Some of the most effective learning occurs in solving real-world problems in a group setting.

- Snipes completes his article with recommendations for five key steps to successful integrated learning:
  - Plan: align the program with both organizational and personal performance objectives.
  - Learn: Use high-quality, media-rich self-paced courses and simulations. Make it flexible and engaging.
  - Apply: Let learners work together to apply the learnings to real life situaitons.
  - Sustain: Use programs that reinforce learning and hold people accountable.
  - Measure: Track individual and group progress.

6. Development Dimensions, Inc. prepares a Leadership Forecast each year. Their 2005-2006 forecast research was based on a survey of 4,559 leaders and human resource representatives from public and private organizations in 36 industries. The following points are from the Forecast's Executive Summary

found at http://www.ddiworld.com/thoughtleadership/leadershipforecast.asp (downloaded July 2006.) Key findings from their work that is relevant to this project include:

- About one-third of internally sourced leaders fail usually because of poor people skills or interpersonal skills.

- Formal trainings are the most common leader development practice, but special projects or assignments are the most effective.

- Use of coaches and mentors can increase effectiveness.

- The most effective trainings involve 'learning by doing' experiences and targeted coaching.

7. The Center for Creative Leadership publishes an annual report entitled *The Changing Nature of Leadership*. (http://ccl.org/leadership/pdf/research/NatureLeadership.pdf.   Downloaded July 2006) There are several useful findings from their work, which is based on a survey of 300 public and private leaders.

- During the last three years, there is a greater need for leaders to be skillful at participative management, building and mending relationships and change, than on the skills of resourcefulness, decisiveness and 'doing whatever it takes.'

- Respondents were asked to indicate which types of activities would improve an organization's ability to respond more effectively to new challenges. The following were the top five activities cited: individual leadership improvement (23%), organizational cultural change (20%), organizational strategy (17%), organizational systems (17%) and mission/vision (12%).

Summary

The above highlights from the reviewed literature suggest several lessons for this project:

1. A multi-mode or blended training approach will be most successful, even within the constraints of a consultant-free model.

2. Connections must be made to both organizational relevance and to personal relevance.

3. The more real-life, problem-solving-oriented, and hands-on, the better.

4. Trainees should walk away from the trainings with an appreciation for the degree to which all members of their board must take responsibility for *leading.*

5. Follow-up will be critical to instill the learnings.

V. Major Topics for This Training Program

Based on the above information, combined with discussions with the state byway coordinator, there are three general topics for training that appear to be most relevant to Colorado Scenic and Historic Byway groups:

1. Purpose and Vision: Byway groups have often lost a clear sense of what their organization is trying to accomplish. Once the process of original byway designation has passed (which provided a clear objective and sense of purpose) byway groups can have a hard time redefining purpose and creating a shared vision.

2. Efficiency: Byway groups, and many other volunteer groups, have a hard time functioning efficiently. As much precious time is consumed by the organization, it becomes difficult to retain governing board members.

3. Action: There are a variety of factors that make it difficult for volunteer groups to stay action oriented, and to keep those actions focused on a shared vision.

For each general topic, there are a variety of potential specific issues that might be covered within the training.

Vision
- Defining the 'big picture'
- Defining mission
- Conveying purpose to the public
- Purpose not seen as relevant to community – especially business community
- Defining critical community needs
- Generating new and fresh ideas
- Defining strengths, weaknesses, opportunities and threats

Efficiency
- Roles and responsibilities
- Burnout
- Turnover
- Delegation
- Recruitment
- Meeting management
- Project management

Directed Action
- Can't get things done
- Skills for execution
- Delegation
- Strategic planning

Other Topics Considered

Other general categories discussed, but set aside as lower priority were funding, critical thinking and board dynamics. Funding can be addressed by directing groups to other sources that have already prepared packaged materials on this topic. Critical thinking will be a skill incorporated into this project's materials. Finally, board dynamics is a lower priority and can be addressed by materials produced from other programs.

Leadership has been a major topic in board training during the last 10 years. Our position on that topic is the following: We assume that all board members have demonstrated leadership in other situations. Our job is to help the board use the leadership abilities of all board members, thus the board collectively asserts leadership on the community.

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