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# THE EFFECTIVE ELECTED OFFICIAL'S workbook

FIRST EDITION • 2022



## Congratulations, you've gotten yourself elected!

How do you shift from citizen to public servant and effective board member? You may discover there is no obvious path.

I have been elected to public office six times; honored to serve as a town trustee, a Mayor and a county commissioner. In each role, I learned by doing. I now support leaders across multiple municipalities and counties, only a handful of which deliberately onboard newly elected officials as well as they onboard staff. If they do anything, usually they cover the what-NOT-to-do part.

If you've ever started a job without any orientation at all, you know you can muddle through and "figure it out" eventually. New board members, like new employees, observe those around them and develop survival habits. Perhaps they find a mentor. Maybe after 10,000 hours of meetings--they achieve mastery. Do you want your first steps as an elected official left to happenstance?

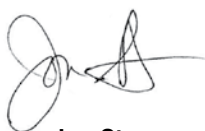


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Most public managers schedule a retreat within a couple months of an election to get the Board aligned with each other and organizational strategies. CIRSA, the insurer of most Colorado municipalities publishes a booklet called Ethics, Liability and Best Practices for Elected Officials, often teaches the legal aspects of the role at those retreats. This Workbook is intended to round-out that training with meeting skills, deliberating as a board, dealing with media and other skills of governance. It is designed help you begin this role thoughtfully, and intentionally, and to be a ready-made tool to augment a PowerPoint and sticky note exercises. Mark it up and make the workbook your own.

Why isn't there more orientation? Local governments are busy. Board members and staff often have so much work that they don't make the time to reflect on how the work is done. And, consider this: you enter this organization at the top of the Organizational Chart. If that is uncomfortable for you, understand that it may be more so (and dangerous) for the Manager or Attorney, not to mention other employees, to suggest to one of their new bosses how to do your job. The manager or administrator is your most important resource. It would be shocking if there weren't aspects of the role for which you are entirely unprepared – deliberating as a group, media relations, reading complex budgets, contracts or proposals and then making decisions in a public meeting – to name a few.

Together, as a board, you are expected to understand things quickly and make important decisions. The last thing you want to do is look stupid. If you want a launchpad to a more deliberate start, this Workbook is intended for you. Take it as an excuse to ask lots of questions. Understand you are not expected to know everything on day one or two, or month three or year one for that matter.



**Jon Stavney**

*Executive Director NWCCOG*

**THANK YOU** to Town of Eagle and Eagle County, and anyone attending those public meetings for providing the backdrop for photos taken by the author.

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getting  
oriented





# HOW TO USE THIS WORKBOOK

Hopefully you attended a few meetings before you ran for office, read a few packets, maybe even spoke up and you understand the flow and structure of a meeting. If so, you have a sense of how meetings flow, but you may not have thought about what skills propel an effective meeting. Many managers like to have new board members get through what can be an intimidating first two-or-three meetings. Unlike, say, learning to play the trumpet, there is some learning-by-doing about being on a board (or council which I use interchangeably) that is best done through experience. I would add, experience punctuated with reflection and study. Managers may use those first meetings to assess what kind of board training may or may not be necessary. Respect that some public organizations are stretched so thin that this onboarding journey, if it matters to you will have to be self-guided. That is OK. If so, embrace it.

First and foremost, communicate and coordinate with leadership at your new organization. In most local governments your point person for that communication is the City/Town/County Manager. Please find out what onboarding plans your organization may already have in place.

This Workbook is intended to provide structure and learning prompts for

- 1. Managing your own onboarding, or**
- 2. Working with a Town Manager and staff to customize an onboarding experience, or for**
- 3. Working together as a Council at a retreat, perhaps with a facilitator.**

Other than the sample checklist and some broad "Preparations" to disperse the learning process over time, the workbook intentionally does not provide a schedule or an order of what to do first.

In the Resources section, there is a sample checklist NWCCOG built for local governments to use for their own onboarding. Use it or work with your manager to create a custom checklist that makes sense for you.





# ROLES & RESPONSIBILITIES

In Western Colorado, as is the case across much of the U.S., local governments ascribe to a form of governance in which the Council or Board provides the policy direction, approves the budget, meets every week or few weeks in board meetings to make decisions that require a public hearing or approval in a public meeting by law. Those elected board members are citizens with other primary occupations who are called to meet a few times a month to make important strategic decisions and move the business of the entity forward. That group then hires and delegates operations of the organization as well as the implementation of policy to a full time Manager. In some home rule organizations, the roles of Manager, Mayor and Board members are quite clearly defined. Others defer to statute which, quite unfortunately, inadequately defines roles and separation of duties between a board and manager.

In County government, the allocation of duties is clarified in Statute among the various elected positions such as Clerk, Sheriff, Coroner. Whether the allocation of duties assigned to others is by law or not, in any public entity most duties are the province of officials other than the board or its' members. Understanding and honoring the allocation of duties is one of your primary roles as an elected official. The separation of duties between the board and the Manager specifically is designed for efficiency, reduction of corruption, clarity of direction for staff. This may sound simple to follow. It is not.

There is a long history as to why this structure has become the accepted and adopted form of governance, separating public decision making from operations. For those with a business framework, publicly traded corporations follow a similar structure with a CEO who has wide latitude to operate the organization within a framework and limitations established by a corporate board. Privately owned businesses tend to be quite different. For those coming from this background, transitioning to a public role as one member of a board in this separated structure, with transparency and public accountability can be a challenge. It is a challenge that one must embrace as it is critical to success of the organization and, from a risk perspective, critical to the board and its members staying out of harms way.

For the purpose of this workbook, what is important is to realize that each of us come to the table imprinted with our own experiences with organizational decision structures, both formal and informal. Those imprints may align with those of making decisions as a group, in a public setting, and may further align with making decisions and delegating away the details to a professional, but in my experience these two frameworks are often foreign to those elected to office, requiring considerable reflection, communication and compromise. Getting at those sooner than later is the purpose of this exercise.

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# self assessment



# SELF ASSESSMENT

*Facilitation Notes:* See pg 39

**1. What motivated me to run for office?**

Internal Motivations:

External Motivations:

**2. Do these motivations imply a role for me on the board?**

**3. Was there a single issue/event/decision that motivated me? A series of experiences?**

**4. How do my values align or differ from what I understand to be the organization's? What values would I like the board to embrace?**

**5. What experiences, strengths or perspectives do I personally bring to the table?**

**6. Name all the sub-communities (social, business, non-profits or work) that I belong to in the community and note how each might inform how I look at decisions.**



7. What is my deliberative style? How am I most effective at coming to a decision?
8. Do I have pet peeves worth identifying so that I can manage them, or so that others can be aware of them?
9. How do I like to receive feedback and recognition? How to I prefer to give it?
10. Outside of Meetings, what's my information gathering style? Do I prefer all the details or an executive summary? Do I prefer to get information through conversations, emails, texts or other?
11. What do I see as going right in the community and organization that may already be in the works or ongoing that I want to support and empower, including specific strategic goals, initiatives or projects?
12. What do I see as NOT going right in the community or organization?

13. What are untapped possibilities or initiatives that I would like to see? Are they already identified in a strategic, comprehensive or master plan at the organization?
14. What am I most excited about this role? What am I most nervous about in this role?
15. How do I handle conflict?
16. What am I most confused about in this role? What am I most looking forward to understanding better?
17. What will success look like for me in this role, and for this Council?
18. **Free Write:** Imagine I have just had my last meeting of my time in this role and write a paragraph summary that I would hope to read in the "newspaper" about the community, the organization, what was accomplished during my tenure and what part I played in it.



# PROCESS QUIZ

*Facilitation Notes: See pg 40*

## TRUE or FALSE

- ☐ ☐ 1. A public meeting is an open forum for any citizen to exercise a right to speak out.
- ☐ ☐ 2. A posted Worksession is when a board makes decisions so they can vote quickly in the next meeting.
- ☐ ☐ 3. The Agenda for any meeting of the board must be posted for at least 24 hrs.
- ☐ ☐ 4. Board members cannot speak with each other outside of meetings.
- ☐ ☐ 5. Three or more board members can have a standing informal discussion about town business as long as they do it in a public place on the same day each week.
- ☐ ☐ 6. Most people who vent in meetings have specific requests and expect action .
- ☐ ☐ 7. Most people who vent in meetings are not used to public speaking and they just want to be heard.
- ☐ ☐ 8. An Agenda is only a list of suggested topics in a suggested order to cover.
- ☐ ☐ 9. Executive Sessions are specifically designed for talking about the Chief Executive of the organization.
- ☐ ☐ 10. Executive Sessions are for deliberating on important items on the agenda in private.
- ☐ ☐ 11. Liquor Licenses require only two criteria: needs of the neighborhood & character of the applicant.
- ☐ ☐ 12. The Town board approves the bill schedule because bills can't be paid until they do.
- ☐ ☐ 13. It is best to come to a meeting with an open mind with some idea how you may vote on an item.
- ☐ ☐ 14. Public Works directors generally request that board members weigh in on snow plowing routes.
- ☐ ☐ 15. The Mayor has broad flexibility to preserve order and manage the meeting process.
- ☐ ☐ 16. It is important that meeting minutes reflect accurately and quote everything that was said.





# meeting lessons



# MEETING SKILLS

A well-run public meeting is Job #1 for a Council. It is also crucial to the public trust in local governance. How citizens observe leadership behaving indicates how other things are run. People have an acute sense of whether a process appears fair. I've seen individuals who testified, energized leaving town hall saying, I made my case and I was heard, even when their argument fails to win the vote if they perceive the process was fair. I've also observed meetings where the audience rightfully feels railroaded. Think of it as the difference between "having your day in court" or not. Or when it appears that a game's outcome is decided by the officiating rather than the players.

For new board members it can be difficult to separate frustration over losing an argument from frustration over what appeared to be an unfair process, but there is a big difference. Try to not get too personally identified with an outcome. The outcome is not owned by any one individual, it is out there, in the middle of the room seeking to be found between the proposal, the staff analysis, the public input and the council deliberation.

**The outcome is not owned by any one individual, it is out there, in the middle of the room seeking to be found between the proposal, the staff analysis, the public input and the council deliberation.**

## MEETING SKILLS & TIPS

- 1. Clearly introduce an agenda item while acknowledging that there is a lot of public input, then road map how and when that input will occur in the hearing process.** If a room full of people want to speak at a land use hearing that will last for months and there is no intent to take public comment that night, say that up front. The same goes for if there are speakers for topics much later in the agenda: ask who is there to speak for what topic.
- 2. Respect Each other as Board Members.** If you want decorum and civility in the forum, model it. Most folks have limited experience speaking in public. They will take cues from the board. Speakers will also often sound more aggressive to mask being nervous.
- 3. Be just as formal as necessary to meet the occasion.** The boards I work with in Western Colorado tend to avoid suits and ties, tend to address each other in first names, often allow board members to speak and interrupt without being acknowledged by the chair. Being overly casual comes at a price. Be aware that the casual tone impacts how the audience may address the board when their turn comes. This goes for the civil or uncivil way board members address each other and manage conflict between each other too.
- 4. Acknowledge written input already on the record and summarize it objectively.** This can be done by staff or someone on the board. It is a good way to let people know the board is listening and implies there are different points of view. It also reinforces that written input is as valuable as spoken input – perhaps saving valuable meeting time in the future.

5. **Acknowledge a speaker right from the start, by name, if possible, especially if they are known by a board member.** Make a note of their name. Thank them for their input by name at the end. This reaffirms community and breaks down the us-them wall.
6. **Board members provide eye-contact to speakers during public input.** This has gotten worse. I've seen entire boards not look up to acknowledge speakers, and generally not appear to be present during hearings which signals to the audience that what is being said is just a formality, including what they say. For goodness sake, don't answer your phone in the middle of the meeting, or stand and walk out while others are talking. Put down your smart phone during hearings.
7. **Use active listening skills.** Attentive board members acknowledge speakers who seem to go on and on by nodding in understanding. At some point it may be useful to interrupt and summarize, "do I hear you saying...?"
8. **Board members ask questions to the applicant or staff that the audience may have, even when they may already know the answer from reading the packet.** Having these difficult questions discussed aloud confirms the open, deliberative tone of inquiry by the board and signals that whatever the board decides, they are not blind to difficult questions. It also puts the answer on the record.
9. **Board members share thoughts aloud, and allow dissent within the board.** Have an actual conversation/ deliberation. Too often boards go directly from a presentation to public input to "do any Council have any questions or comments" to a vote without anyone in the audience hearing a single thought to back up how the board votes.
10. **Avoid deferring to consensus votes just to get along.** Learning civility and harmony through disagreements is a learned skill for board members. Even if board members know each other's opinions, voting without deliberation, or a summary of positions by someone leading the meeting or making the motion does a tremendous disservice to the process. Often speakers whose arguments don't win the day come up to dissenting board members later and say how much what they had to say was appreciated. It matters.
11. **When making a motion on divisive issues, state the whole motion with modifications.** When issues do receive considerable back-and-forth discussion, especially if there are wording changes from a motion prepared in the packet, I've observed board members say something like "'I will make that motion'" and then a vote occurs when not everyone on the board or in the audience is 100% clear the content of the motion. An easy trick, ask the Clerk to repeat the motion before the vote. If they cannot, then likely others are not clear.
12. **Expect a Mayor who skillfully manages and room and remains focused on the process.** There is an additional suite of skills for Mayors to skillfully and assertively guide the room through a process without appearing to "control" or determine an outcome. Those who facilitate a meeting well may not even appear connected to the content. Those who want to be very active in the content or debate may do well to delegate meeting facilitation to a Pro-Tempore who isn't. Meeting management is an art developed over time. It can be learned. For boards with a Mayor who is not yet skillful in these skills, it is important for other board members to be situationally aware and "lead up."
13. **Make sure Amendments are clear.** In Robert's rules, votes are stacked to address individual motions. This can be very confusing. When a motion gets confusing or complex with many amendments (or discussion about amendments that don't happen), before going to a vote, consider reading the entire motion with amendments afresh to ensure all involved, board, public and staff are clear on the vote.



- 14. Discuss Plans as a group for De-Escalating various situations ahead of time.** Have a plan for handling disruptions. The most common and useful tool is to call a short recess when things escalate. Members by their own words and actions can de-escalate tense situation through courtesy, tact and diplomacy. If else fails, many Mayors have a panic button, and many boards think ahead and request the presence of law enforcement at potentially tense meetings. Their presence can be a subtle reminder about civility.
- 15. At the end of a Meeting or Worksession, review notes and recap action steps.** This can be a request to the Manager to review actions so that everyone is on the same page about what actions were and were not assigned by the group (individuals do not get to assign work to staff). This is a common area for misunderstandings to arise, when individual board members bring up items and assume that it has translated into a directive when others, especially the manager heard it as a discussion item.
- 16. If there was Conflict during a Meeting, especially between board members, carve out some time at the very end or afterwards to address it.** While it is inappropriate to rehash the content of decisions made, it is important to discuss the process and how board members actions impacted each other. Not addressing these head-on can be a first step towards a dysfunctional board. Recognize that if the conflict affected the whole board, attempting to resolve it one-on-one may or may not completely address the issue. Sometimes complete resolution of discord within the body can only be achieved by an "eyes-up" discussion among the members, or a separate retreat to address chronic issues. The best plan is to debrief at the end of the meeting when possible.
- 17. Read the Packet.** Many meetings get sideways over board members trying to figure out things that would have been answered through a careful reading of the packet. Just reading through a meeting packet can be overwhelming. Understanding content can take up a significant portion of some meetings. It is important that board members understand the basic parameters of a decision. It is also important for board members to realize this next thing:

You will never have all the information possible to make a perfect decision. Boards need to keep the business moving forward by making the best decision they can with enough information to be able to make a judgment decision. Most boards do not realize how much work staff puts into bringing an ordinance or file to a place where it is ready for the board to make a couple key final decisions for a vote. Decisions should come somewhat packaged to the board. For example, a board that is spending excessive time drafting conditions or negotiated language is probably dealing with a file that was not developed enough before it was put on the agenda. If a packet doesn't supply enough information to make a decision it is a board members responsibility to know that before the day of the meeting and to request more information before the meeting. This is called preparation.

Tabling a difficult decision for lack of backbone is not acceptable. This takes some courage. I've seen board members intentionally skip meetings with difficult decisions. I've also seen them step down or "recuse" themselves from a vote just because they are torn. A recusal should happen from the beginning, before an agenda item occurs and there are specific reasons for a conflict of interest which may prompt a recusal. Being afraid of a difficult decision does not qualify. Tabling items because the negotiations are clearly not baked enough at a staff level is one thing. Tabling an item because there is clearly another hour of public input that needs to be heard is another. Tabling an item because it is too late to make a good decision is yet another. Tabling a decision because it is difficult and there is no perfect decision is NOT acceptable.

**You will never have all the information possible to make a perfect decision. Boards need to keep the business moving forward by making the best decision they can with enough information to be able to make a judgment decision.**

**18. Learn how to read a packet.** Just like a contract, it is likely you don't yet know what parts are boilerplate which parts just need to be there to be there, like Geological Reports in a land use file, and which passages are crucial to your decision. Some managers provide memos for key agenda items highlighting points worthy of deliberation. In short, before you participate in a meeting or two, you probably don't know yet what you don't know.

**19. Understand how you process information.** Back in the day, I marked up my packet, made sticky note flags, and wrote questions on the cover page of any item that wasn't fully understood. I also made notes on the agenda to be sure if I had something to add or ask that it didn't pass me by. This is more difficult with electronic packets today, so figure out your own system. If it is on a separate notepad or Word document, then fine. Make decision trees, word maps, doodle, write If-Then statements to help with deliberations. If you are verbal processor, then figure out how to do that before the meeting. You can call the Mayor and discuss, or the Manager to clarify. If you need to talk in circles aloud in a public hearing to work your way around to a decision, know that this will become very tiresome for those around you.

## MEETING SCENARIO PLANNING

### UNDERSTAND THE MOTIONS AND NORMS FOR YOUR MEETINGS

Most of the local governments I work with are relatively informal, only following a loose version of Roberts Rules of Order. Meetings are not rocket science, yet boards butcher them and embarrass themselves on every night of the week somewhere. Google "Dysfunctional city council" and watch some videos. Most don't descend into that place in one evening. Don't be that board. The three areas of a meeting you should take some time to deconstruct are these:

1. Meeting Process, and how a meeting is organized
2. Approaches to different Content on the Agenda
3. Discussing together how to handle possible scenarios

### DISCUSS LIKELY DIFFICULT SITUATIONS

There are many situations to discuss as a group and practice, although few boards take the time to do mock meetings together and work through hypothetical situations. I recommend that they do this in a Worksession or at a retreat with new board members. Doing so can be very empowering. It will make board members more confident. It also has the benefit of allowing discussion of how board members actions and styles impact each other.

I've facilitated retreats for boards in conflict who don't see a way out of maladaptive patterns that continually repeat. These often develop over time, yet Mayors or Managers often fail to see issues festering (or if they fear interceding). When conflict seems to persist from one agenda item into later items, or from one meeting to the next, it is time to provide space for the issue to be addressed before it develops into a deep rift between board members, or board and staff. This is easier said than done.



# workbook





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# ROLES & RESPONSIBILITIES

*Facilitation Notes: See pg 41*

1. Describe the operating framework of your current workplace. If you are in charge, describe your style (delegator, doer).
2. Describe the operating framework of your household? Or the family in which you were raised?
3. Your best and worst job? What about the operational framework contributed to making best or worst?
4. Have you every had experience with a shared decision-making framework, such as making decisions as a board?
5. If you have had experience with a Board/Director or CEO type relationship, describe it.
6. Work with your Council and Manager to list and discuss roles below.

Manager (or staff) Roles	Board Group Roles	Individual Members or Mayor Roles

- Setting agendas
- Drafting memos
- Hiring staff
- Disciplining staff
- Researching content
- Voting on ordinances
- Visioning
- Developing a budget
- Negotiating contracts

- Approving budgets and contracts
- Drafting proposed ballot language
- Communicating citizen input
- Running a public hearing
- Running an election
- Safekeeping records
- Negotiating with developers
- Approving development agreements

- Enforcing code
- Ensuring policy is implemented
- Deciding policy
- Strategic planning
- Tactical planning
- Working with consultants to develop utility funding structures
- Approving utility rates
- Deciding what to put on a ballot



Name: \_\_\_\_\_ Date: \_\_\_\_\_

- ## 8. Other Notes





## PEER INTERVIEW #2

---

Name: \_\_\_\_\_ Date: \_\_\_\_\_

1. What drew you to this place originally?
  
  
  
  
  
  
  
  
  
  
2. What keeps you here?
  
  
  
  
  
  
  
  
  
  
3. Describe your work, your family, what you like to do to recreate, and your role in the community currently.
  
  
  
  
  
  
  
  
  
  
4. Describe how living in this place supports or impacts you and those various roles.
  
  
  
  
  
  
  
  
  
  
5. Describe what you bring to the table as a board member.
  
  
  
  
  
  
  
  
  
  
6. Describe your leadership style, personality type, how you make decisions, and strengths/weaknesses.
  
  
  
  
  
  
  
  
  
  
7. How do you like to receive feedback or be recognized?
  
  
  
  
  
  
  
  
  
  
8. Other Notes



# MEETING PRACTICE EXERCISE

*Facilitation Notes: See pg 42*

**Discuss or role play the following situations:**

1. Board protocol for responding to Public Comment (random, specific, hostile)
2. Board skills for de-escalating angry speakers (or addressing a hostile room)
3. Protocol in responding to violence or possible violence during a meeting
4. How to hold each other accountable (scenario of constantly texting board member)
5. Practice how to handle disagreement and dissent, how create a break and to move on
6. When and how to air disagreements or disrespect for process or between board members
7. Practice summarizing, roadmapping and Active Listening during a meeting



# COMMUNITY STORYTELLING & MEDIA SKILLS

*Facilitation Notes: See pg 43*

**NOTE:** This worksheet can be combined with Lesson on page 29.

1. What is one narrative about yourself that is important to your sense of who you are?
  
  
  
  
  
  
  
  
  
  
2. Is there a binding narrative, elevator speech or key talking points about the organization/ community/place or its mission/values that is shared? Can the group identify it?
  
  
  
  
  
  
  
  
  
  
3. What are some “alternative” narratives you may hear about the organization or the community to which you are elected?
  
  
  
  
  
  
  
  
  
  
4. As you spend time learning more about the organization or the scaffolding of community building from the inside, differently from how the general public sees it, how do you see those narratives now “from the inside?”
  
  
  
  
  
  
  
  
  
  
5. Are there narratives you actively want to change about the organization or about the community?

6. Ask yourself, do I have a role in providing a counter-narrative?
7. Look over your parks, recreation facilities and public spaces, then look at your commercial districts and your neighborhoods in your minds eye and write down what you think is being communicated by the built environment.
8. Search through your organization's website like a newcomer, walk in the front door and write down what those experiences communicate about the organization and the community.
9. Understanding and acknowledging these narratives, and contemplating how you would like to change them through storytelling as a leader can be your most powerful contribution to your community over time. Do you think this is a role you have, or are there others better positioned to do this? Is it being done strategically?





# MEDIA & ACCOUNTABILITY

**NOTE:** This worksheet can be combined with Lesson on page 29.

1. What are three things you never want to be quoted saying as an elected leader:
  - 
  - 
  -
2. Describe your experience with the media, or social media, and if you don't have any, then describe your impressions about the purpose of media and it's function in the public realm.
3. Is holding your local government and leadership accountable one of your primary motivations for office?

## MEDIA EXERCISE

**Brainstorm some scenarios with participants and then role play with a partner being a reporter and an elected official. Debrief with group after each. Below are sample scenarios.**

- Board had a hotly debated 4-3 split vote at 10 p.m. last night approving a new zone district allowing sale of retail marijuana. One person play reporter calling at 3 pm the following day (just before deadline) and the other play a board member from the 3 who voted against it. Reporter, ask questions and write some quotes to share with group in debrief.
- Manager held an Executive Session with board to inform of incident (sexual harassment) that led to an investigation which has just concluded for which he is firing the public works director the following morning. Before a press release is written, the public works director has called the local paper saying he has been let go unfairly and plans to sue the town. One person play reporter from the paper asking questions and the other play council member.
- Brainstormed Scenarios (write your own here):



# PLACEMAKING QUICK ASSESSMENT

*Facilitation Notes: See pg 43*

1. Are there neighborhoods, districts, parks or spaces that you identify with or feel are iconic when you think of your community?
2. If you don't know the origin story for some of these key features, buildings or spaces, take some time to ask someone else on the board or staff if they know how it came to be.
3. Look over your parks, recreation facilities and public spaces, then look at your commercial districts and your neighborhoods in your minds eye and write down what you think is being communicated by these various pieces of the built environment.
4. What place making features do you most admire in other communities, near or far?

5. Place is also about programming, activities and what “co-creators” do. Identify some of these activities, events and important co-creators. What can you do to support these?
6. What plans does your community have in the future to improve place and what role will your board have in helping them come to fruition?



## SUMMARY

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1. Top Takeaways from the Exercises:
2. Key items to Follow Up on:

The image is a full-page background featuring a silhouette of a person with a beard speaking into a professional microphone. The microphone has a large, oval-shaped pop filter in front of it. The entire scene is rendered in a monochromatic orange-yellow color scheme, with the person and microphone appearing as dark shapes against a lighter, hazy background. The word "lessons" is centered over the microphone.

# lessons





# MEDIA SKILLS

## COMMUNITY STORY TELLING

If you have been elected, you probably have some traditional media and social media savvy and probably are competent at situational awareness. You are good at reading people if you campaigned much at all. You are probably relatively emotionally intelligent. Those skills will serve you well.

As an elected official, you need to be aware that you are no longer speaking only for yourself, but for your organization. Reputations are built over years and can be destroyed rapidly. I am not suggesting you surrender your identity or opinions when elected, just that your words will have a different impact when coming from "inside" the organization. Be very aware of this as you transition from citizen to elected. You may not see yourself differently, but believe me, others will.

Narratives are powerful. They develop to connect experience with perceptions. Sometimes these are well-grounded in truth. Sometimes they take a life of their own. Sometimes, an organization has a vision, narrative or story from which strategic plans and other actions revolve. Over time, people develop narratives and then tend to add pieces that confirm that narrative. Because of that, it is important to be aware of narratives. Effective leaders understand their own narrative, the why of what they are doing, the why of the place, and they are also aware of counter narratives that others may have.

## MEDIA & ACCOUNTABILITY

This is an important role for elected officials. In a general sense, it is your primary role. You are the government now. But the organization also has staff, systems and processes that continue regardless of your decisions and what you do. Hopefully citizens don't have to rely on their public officials to keep the water flowing, the toilets flushing, the streets clear, trash removed, the grass mowed, summer concerts rolling, and the public safe. Hopefully, being on the inside will give you a deeper understanding and appreciation for all the work that goes on to in local government to maintain and improve the place you live. Certainly, there is room for improvement. You will likely see that up close as well. Most citizens don't want to pay enough for everything to be done to meet the gold standard. Most see their block as the most important part of town. So what is the proper level of expectation with regard to levels of service? What is good enough for the cost? These are important questions to consider as a public official.

If an important part of your identity that motivated you to run for office was as a change agent who was dissatisfied with the organization, or you consider yourself a watchdog or gadfly, or any other role that naturally positions you as an "outsider" to the organization, it is important for you to think carefully, and perhaps openly with the Manager or Mayor about how you want to balance this self-appointed role now that you are "inside" the organization. If this is part of a persona you have developed with followers on social media, you will have to re-balance expectations there as well. You are in a very powerful position to translate between the two realms, and perhaps create understanding. More than a few board members have gotten themselves in legal or ethical trouble by not making this transition.

You may learn that there are accountability structures in place, and that you are suddenly on the other side of the equation now that you are elected. Local newspapers used to be the primary medium for citizens to get information about what was happening in their local governments, and media took their role as watchdogs seriously in many cases. Newspapers provided a backbone for community dialogue. That has changed.

When I started as a Board member in a small town, it was not unusual to have reporters from 3-5 local newspapers sit through a meeting with controversial topics and then ask question that night or follow up the next day. Reporters loved to call new board members because they would often get less-filtered quotes which didn't sound the same in print as they may have during a casual phone conversation. Over time, I learned to be more skillful with the press. I learned that having good relations with the local press can be advantageous to getting out a message. Now it is somewhat common for board members to be tweeting out or posting blog entries during meetings, and most rural places are lucky to have a local newspaper at all. Still, you should learn to be media savvy. Any kind of communications occurring during the meeting that are not public and on the record have the potential to be a violation of open meetings laws, open records laws and accountability dynamics. If they are made before a decision, they may be grounds for the type of violation that defiles the entire decision and hearing process for that item, overturning a decision or requiring a re-hearing. Reflective tweets after a meeting usually do not have the same risks, but also be conscious of contradicting decisions made by the body. Dissent is important and has it's place. Not backing decisions made by the body especially if it becomes a habit can lead a board to punish such board members by rendering them ineffective over time.

## QUESTIONS YOU SHOULD ASK AS A NEW BOARD MEMBER

1. **Do we have a media policy or protocol?** Mid-size organizations and larger ones often have a Public Information Officer (PIO) whose job is to write and put out press releases, and to manage media access to elected officials. For smaller organizations, the majority of communications come from the Manager and/or the Mayor. Have a conversation internally about how to handle requests from the media before you are contacted.
2. **For High Profile Matters, those involving Confidential or Personnel Matters or Executive Session content: insist on a conversation clarifying "what are our talking points on this?"** Better yet, appoint a spokesperson.
3. **Who are people who might be calling from the media? Is there anything about their angle of which I should be aware?** This is a fair warning question to ask staff or more senior elected officials who have experience navigating the minefield of self-appointed citizen watchdogs with blogs, opinion bloviators posing as media, those who are perpetually trying to make government leaders look bad, as well as those who will respect off-the-record input, and those who are sympathetic to local leaders. To be clear, I think you should probably be brave and talk to all of the above but be extra-cautious about how what you may say will be delivered.

## QUESTIONS FOR BOARD MEMBERS TO ASK AN INTERVIEWER

1. **Before you have to ask, the interviewer should identify who they are and their publication/channel/station.** If these are not readily offered, that is a major red flag. There is nothing wrong with deflecting and directing them to appropriate staff.
2. **Ask for the interviewer to clearly state the topic or situation and what they are seeking from you.** If they only want to confirm a vote or your quote from the night before, don't ramble on, providing them cannon fodder to propel you into 15 minutes of unwanted local fame.
3. **Ask "what is your deadline" and "can I get back to you?"** This shows you respect their request and that you intend to reply. It also buys you time to prepare a thoughtful answer or call someone who can explain the situation from a different perspective, or who knows the situation or who can act as a sounding board to you about what to say. Many a board member gets in trouble by reacting to a call from the media regarding something they had not yet been informed about. "What? A police officer shot a poodle? Well, I condemn the police department for that. Somebody should be fired..." When a quick call to town hall would have revealed that the dog was foaming at the mouth and attacking pedestrians on the street. It is perfectly acceptable when a deadline is imminent, and you don't know enough to respond to call back and say that you don't have enough information to respond. It will affirm your relationship with the media and pay off later.

4. **Who else they have spoke with for the story?** This can alert you to if they are trying to use you to get conflicting quotes. If they have already spoken with the PIO or Manager and you don't know the rest of the story, be very cautious. It is fully acceptable to simply refer them to someone closer to the situation who knows. "Well, If you've already spoken to the Chief about the dog situation, then I don't have anything to add at the moment."

## QUESTIONS TO ASK YOURSELF WHEN CONTACTED BY THE MEDIA

1. **Do I have enough information to respond? Am I comfortable responding?** If the answer to either of these is "no" then say so. Politely decline the interview. That goes for specific questions as well. Don't feel obligated to answer every question.
2. **Is there someone else who would be better positioned to respond?** There is the police situation above as one example, but sometimes a reporter is just hunting for a good source or quote and you can get as much benefit from directing them to someone in your circle of contacts instead. Directing them to another source which has issued a response, or to a prior press release by your entity, or to an official document such as a staff report can be one way to be sure you are not misquoted while directing media to an appropriate source.
3. **Write down exactly the words you would like to see in the paper with your name beside it.** If you are the right person and you know the situation and feel comfortable responding take some time to think about what you want to say before calling back. Especially after an exploratory conversation about the topic with a reporter, I often circle back to say or repeat specific quotes as I would like them to be written.
4. **Practice circling back to the key messages that you want to communicate.**
5. **Ask yourself, am I saying too much?** A good reporter is also a good conversationalist and can get an interviewee sharing more than they intend or respond too casually or impulsively. Not every reporter will, but it is worth saying, "can you not quote me on that," or "that didn't come out right, can I clarify?" Most know that access in the future has value, but if you don't catch yourself and ask for a mulligan, don't expect them to give you one just because it might make you sound awful.
6. **Don't speculate.** Be careful of leading questions or questions that lead you to speculate.
7. **Incidents, Emergency Management:** Especially in an emerging incident or crisis, elected leaders should defer to incident command. You don't want to be the one on social media who tells a neighborhood to evacuate to the North when incident command is telling them to evacuate to the South.

If you are in an office that has regular interactions with the Media, or are in an ongoing or upcoming situation with a lot of media attention then don't be embarrassed to ask for coaching, or to ask to practice the above skills with someone you trust.



# PLACEMAKING

Somewhere along your journey as a local official, one of the areas worth your study to better understand is the importance of the built environment (buildings, streets, sidewalks, parks) to what some planners call "placemaking." For many citizens these spaces and forms contribute directly to their connection to place. One powerful sphere of influence local officials have is the ability to shape the private built environment through the land use code, zoning and development review. They also have the ability to shape the public built environment through strategic planning, including streetscapes, parks, public facilities and art.

Once you've participated in the decision making about land use on a large scale as you look around your own community and travel through others, you may begin to see how coherent some parts of a community are from an architectural, planning standpoint, how certain features, a park, a statue, not to mention a path, trail or preserved parcel mark a place as special. Some become iconic. Some become the brand. You will also begin to understand the interplay between private and public investments in placemaking. You will also see a lot of jumbles places, blight and think, who let that happen?

Just about everything you see in a community is a result of prior decisions made.

Ask the Manager, Planner or Community Development Director to share the Community Plan, Zoning and Building Codes with you. Their detail will be overwhelming at first. Ask yourself, what is the placemaking strategy behind these if any? Also be aware of placemaking during budget season when making decisions about Capital projects.





# self-preparation

This section is intended as a self-guided extended learning tool for those who have gone through this Workbook and found themselves hungry for ongoing training in the field who also like some external structure for such training. If you organize yourself this way, it may be beneficial to write your own on-going education plan.

If your preferred search engine doesn't populate with continuing resources in various areas of interest, feel free to contact me. I'd be happy to help, point you in the right direction, or use the feedback to improve later versions of this workbook

**These are in the form of questions for a board member to ask of themselves, and check the box ☒ when they feel this is adequately completed.**

## THE FIRST MONTH

- ☐ **MEETING PACKETS:** I've asked the Manager or an experienced board member about their recommendations for reading Council packets and I have a general understanding about the relative importance of what parts I dive into deeply and which parts are there primarily to be put on the public record and are OK to skim through. Yeah, you don't have to read every word of every packet as if they were equally important to the decision to be made. You darn well better open that packet and put some time into understanding what is coming. You do everyone involved a disservice by thinking you'll learn everything you need to know at the meeting.
- ☐ **HOME RULE CHARTER OR STATUTES:** I understand that we have a Home Rule Charter and I've read it and asked questions about things that are unclear. If we are not home rule and therefore subject to Title 30 (Counties) or Title 31 (Municipalities) of the Colorado Revised Statutes, I have read and fully understand the CRS Title appropriate to my elected office. Note: For Statutory towns & counties, this question is kind of a joke. Knock yourself out if you want, but you have an attorney to interpret what your jurisdiction can and cannot do based on the Statutes (CRS) and evolving Case Law. What is important is that you understand the legal framework from which the powers of the board derive and those by which are limited. When I have quoted statute at a council attorney (not in a public meeting) I've often been told I am misreading. It usually leads to an interesting discussion.
- ☐ **ADOPTED CODE OF ETHICS OR CONDUCT:** I have asked what is adopted and what I should know about it and where to find these documents. Not all boards have this. They should. Attorneys will often say that "conflicts of interest" are sufficiently defined in statute, which is half true. Defined, yes, sufficiently to cover the many shades of gray, not so much. Officials in statutory municipalities are subject to the State Standards of Conduct in Title 24, Article 18 of the Colorado Statutes. Without a Code of Conduct, it is a challenge without consulting an attorney what statute may apply, but they need to be consulted and understood. A good Code of Conduct clarifies a lot of behaviors that may be unethical to some and but arguably legal, like nepotism or prolonged absences from meetings, and sets boundaries on wayward board members, or those who don't respect the office, the process or their peers. It can also be written in "plain language" rather than legalese. Believe me, it can come in handy in dealing with those whose moral compass is broken.
- ☐ **OPEN MEETINGS LAW – the Difference between Legislative & Quasi-Judicial Hearings:** I understand the basic parameters of each of these and the limitations on my behavior related to each. This is covered better elsewhere by materials provided by CIRSA and others, but before you get too deep into meeting content and start getting asked questions on the street about town business, you ought to know this.

- **MEETING BASICS 1 – Procedures, Flow & Process:** I have taken the time to understand what we are supposed to be doing in various parts of the agenda including, consent agenda, bill schedule, liquor or marijuana licensing, public comment, deliberating an ordinance or resolution, approving a contract for services, land use hearings. I understand that each may have different findings required to be listed in a motion. 1a. I understand when to bring up things tangential or off the agenda. Many a board member has made themselves tiresome holding up a Consent Agenda asking questions that should have been asked at the prior meeting or speaking up during the bill schedule when they see an expenditure that reminds them how much they hate how staff mows the athletic field or asking questions about what is on the menu to a restaurant owner seeking an annual renewal of their liquor license. Many a Mayor seems incapable of gatekeeping rambling board members and keeping them on track. Some boards wonder why meetings go on far after the bars close and late-night TV monologues are done. Don't be that board member. Many boards have open discussion at the end of the meeting for such random topics or pet topics. Take a note, bide your time.
  - **MEETING BASICS 2:** I understand how to make a motion and how to provide a second, and when discussion or deliberation occurs. Open your mouth. You were elected to represent the people and you have a responsibility to let them in on your thinking. Putting your individual and collective thinking on the record builds trust by explaining to citizens why a decision is made. It can also inform later boards or be used in court. Building a record of deliberations can be helpful to defending those decisions later, assuming relevant criteria is discussed and appropriate decision-making points are factored. If nothing else, it can show you listened to testimony, generated some thought into it, read the packet that staff took hours to build. Knowledgeable board members are appreciated. I've sat in plenty of meetings when it seems like no one will step forward and do these perfunctory things, like make a motion. Some board members annoyingly don't ever speak, causing the other board members to do all the work. Besides, making a motion is the best way to get your name in the record.
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## THE FIRST THREE MONTHS

- **MEETING SKILLS TO OBSERVE AND PRACTICE:** *(See Meeting Lessons section)*
- **MEDIA SKILLS AND PROTOCOLS:** *(See Media Skills section)*
- **THE BUDGET:** public budgets in Colorado have a standard format designed to show the proposed upcoming year's expenditures in context with current year actuals, what was budgeted for this year, and two years of audited prior year budgets. This is intended to allow some transparency about changing revenues (top) and expenditures (bottom) over time and to alert boards to how current expenditures may differ from what was recently budgeted or adjusted. That said, it is a worthwhile exercise to ask your manager or finance director to sit down for an hour or more and walk you through the budget so that you understand how to read it. For many jurisdictions the budget for the coming year is the Work Plan and the Strategic Plan laying out the priorities more clearly than many pages of mission statements, values and strategies. If it's not in the budget, chances are it is not getting done.
- **MISSION, VISION, GOALS, STRATEGIC PLAN:** I lump these together because some jurisdictions have one or more of these as NorthStar documents around which every action revolves. Others have none of these and seem to get by just fine. If prior boards, staff and quite possibly the citizenry spend blood, sweat and tears in wordsmithery on any of these four things in recent times it is worth taking your time to understand. It may just explain a lot about an organization, or they may be just words.
- **TOWN CODE:** I understand that much of what we decide becomes "code." I have asked the Clerk, after adopted, where do Codes reside and how can I research them? Before the internet I remember having a stack of binders pointed to and being told, the sum total of all decisions made by the jurisdiction in the past 100 years is written therein. Even with modern search engines it is astounding how much legislative code even a very small town can accumulate. Some code may exist from horse and buggy times if code hasn't had a comprehensive edit and review. That is a gargantuan task, by the way.



## THE FIRST SIX MONTHS

- ☐ **LAND USE CODE, ZONING, AREA AND COMPREHENSIVE PLANS:** I understand these guiding documents for land use and how they are applied, and I pledge to someday read through or skim through each document. Board members who first serve on the Planning and Zoning Commission have an advantage over those who didn't. Unlike much of the legislative function of local governance, decisions about land use often have 50 to 100-year consequences. A decision to allow open containers in a district or how much to spend on summer concerts can be reversed if it becomes obviously a bad idea. A new commercial development that doesn't have good traffic & pedestrian circulation and isn't in keeping with the character of that neighborhood will be an ugly mark on your community for a very long time. If you are immediately thrust into a review of large complex land use files as I was in 1998 when there were two massive PUD and annexation files each of which would have doubled the land area of the small town where I lived underway, you may get to know these much sooner. On top of regular town business, we had separate hearings and separate massive binders with proposed Annexation and Development Agreement proposals to review. More likely, you may review a site-specific development file or two in the first months and the Planning department will point to whether the proposal is in compliance with the land use code, existing zoning or the Comprehensive Plan for the town. Later, you should circle back and understand these documents more broadly. This is worth an hour or two of tutoring by staff.
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## PLEDGES

- ☐ **I UNDERSTAND AND PLEDGE TO MAKE A STUDY OF "PLACE" AND PLACEMAKING.**
- ☐ **I PLEDGE TO BECOME A STUDENT OF GOVERNANCE, POLICY AND LAND USE.** This introductory workbook is not the place to intimidate with a comprehensive list of readings. For a lifelong learner, local governance can be fascinating. It has led me to attend classes, conferences and read about urban design, infrastructure finance, water law, property law, constitutional law, architecture, planning, commercial development, the history of cities, conservation, policing, racial equity, voting rights, democracy and waste management to name a few. Most of my adult reading library comes from contemplating civic issues. My entry was attending the Rocky Mountain Land Use Conference hosted by the Denver University College of Law. I have not gone back to school to earn an advanced degree, but my first days on a town board have set me on a course as a lifelong student of local government and public policy. It has also taught me to that all public policy is an experiment.



# facilitation guide





# WHY A FACILITATION GUIDE

Most of the contents of this section were originally embedded in what is now the main workbook section of this workbook. In some cases, the contents were attached to specific questions further expanding the question, providing examples or context. These are now gathered here for anyone who wants to know a bit more about how to answer a specific question or understand the “why” behind the questions. This makes the workbook section “clean” for those who don’t want the additional details. Instead of trying to carefully annotate each of the notes below to the specific questions to which they may correspond, which would have some users bouncing back and forth constantly, it was decided to just break by paragraph keeping them in order by section.

Though it is called a Facilitators Guide, this section has no secrets, and can be leveraged for context by anyone self-guiding through the Workbook section. It also notes where expert knowledge is important. Other content contained herein were side bar “Facilitator Notes” explaining how to set up the exercise. These are merely suggestions. Experienced facilitators who have worked with boards before will leverage the contents of this Workbook where useful for the group, and discard contents or instructions as they deem fit. There is no magic to the order of the contents, nor is it expected that any single retreat would use this Workbook front-to-back.

Though anyone can facilitate, I highly recommend someone with experience in local government. I’ve seen Town and County Managers do this themselves, or a nearby Manager facilitate for a neighboring jurisdiction successfully. I’ve seen representatives from CML or CCCMA, including “retired” Range Rider Managers lead these sessions, and I’ve also seen respected, experienced past Mayors do the same. In any case, do include the Public Manager for your organization, and consider including staff senior leaders as well if that will not inhibit genuine sharing among the board. Sometimes fewer people in the room can be better.

Last, if possible, hold retreats away from Town Hall. Within reason, ignore concerns about what the public will think about spending money on food and lodging. Believe me, they will appreciate the “value” of a board that has worked out some of it’s issues, one that knows it’s role, one that is effective over one that saved some travel money but is dysfunctional, or pretends to not be headed in that direction.



# WORKBOOK FACILITATION GUIDE



## SELF ASSESSMENT

The questions in this section may be used for self-reflection to gather a clarity of purpose, or it can be “homework” for participants to bring to a facilitated group retreat where individuals share in their answers to each question. The questions could also be leveraged for group discussion without prior time to reflect and answer individually.

For a facilitation, during a general roundtable sharing-in with each question, the facilitator may want to write key-word notes for each question on Sticky notepads on the wall around the room or on a whiteboard. This can be used to later show similarities, or assist in prompting group discussion.

Focusing on commonalities or understanding personal stories or differences about motivations for seeking a role can be very useful in developing respect for each other. Each person has a personal narrative that they bring to the table, and remembering that can help humanize deliberations later. It is also something to remember about staff and citizens.

What people believe they bring to the table can be important for context. Remember our system is built on citizen participation as non-experts. This can also be a time to make the point that: people are elected as generalists, so the question is not specifically about professional skills they may have from a day job as a mechanic, teacher, accountant, or attorney. They were elected to be an everyman “novice” in government representing the perspective of the average citizen in making important strategic decisions about the future of the community, so focus less on professional skills, and more on different lenses through which you view the community.

Listing sub-groups and understanding that we each belong to many groups can help participants see that they actually represent a broader swath of the community than what they may think. These days many people embrace one group (too often it is a political party) to the exclusion of other groups of co-workers, friends, and acquaintances. This exercise can also help with understanding differences. Advanced follow up question: what sub-groups are not represented by this group and how might that be addressed?

In developing a team, it is important to promote discussion about deliberative styles as this is a source of friction among board members. A facilitator might even ask about who spent a lot of time and appreciated being able to weigh answers to questions ahead of time, and who wanted to have the discussion before cementing their thoughts on paper? Those who are verbal processors can tire their colleagues, yet having some true deliberation is valuable to everyone in a meeting context.

This is also about individual preparation. To be effective as a board member develop self-understanding: How am I most effective at coming to a decision? For instance, I need to understand everything first then “sleep on it,” or I just need to know the “bottom line,” or I need to talk it out, or I need to draw decision trees or doodle. Boards make a lot of decisions, some are perfunctory, many have lasting consequences. Understanding how you deliberate and how those around you deliberate is important to being heard, being effective as a team, and seeking understanding before getting frustrated. If board members understand this about each other they may be more patient with each other and thoughtful about providing feedback.

**You were elected to be an everyman “novice” in government representing the perspective of the average citizen in making important strategic decisions about the future of the community, so focus less on professional skills, and more on different lenses through which you view the community.**

Pet Peeves are worth bringing up to acknowledge that we have them, and to give others in the group "permission" to curb them when they inappropriately come up. It can also begin to help board members gate-keep each other when a pet peeve crosses a boundary into an area that belongs to staff responsibilities.

Feedback or recognition: this could be an entire workshop. For other team members it can be valuable insight.

Information Gathering Style: this is a source of much frustration between board members who rarely identify it. For a board member, this self-awareness can be the difference between being effective or alienating themselves. Ask yourself: Do I prefer all the details or an executive summary? DO I prefer to get information through conversations, emails, texts or other? As an elected generalist with a lot of decisions to make, you'll have a lot of reading and information to digest and is it important that you and the board work through how the information flow works with your manager.

On what is going right, what isn't and what untapped possibilities questions, this is a mini-SWOT analysis and can be facilitated as such. Caution: what is going right or not questions are not intended to replace a strategic goal setting session, only to help alert staff and fellow board members to perceptions to be addressed later. The excited answer could be a north star to prominently note on the cover of the workbook to hold on to when the job gets challenging.

The Free Write may be a bit too much for some. It is an exercise that may not yet be useful for new board members who just want to focus on getting oriented. It can be a useful starting point for a more experienced board that has lost it's way. There are pitfalls to focusing on individual legacy as a board member since all success and failure is shared with each other, the organization and the community, but many boards auger into unimportant minutia, petty arguments that persist and lose sight of the big picture. This Free Write is intended to break that. If there are board members nearing the end of their tenure, it may be worth them sharing this with newcomers.

## PROCESS QUIZ

There is no entrance exam to run for office or to be allowed to serve on a public board or council, just as there is no exam to become a parent or other important roles. Yet, there are things to know if you intend to be effective on a board.

This quiz is intended to be led by a facilitator with knowledge of the answers, perhaps with the organization's attorney in the room and to help guide discussion about correct answers, and curb misunderstandings. It touches on legal issues such as open meetings law, executive sessions and, also process. The intent is to prompt discussion of common misunderstandings some of which are important for leaders to stay out of trouble.

In a workbook there isn't enough room for instruction or full answers to each of these questions. A quiz which might put-off some, but, as a facilitator you may challenge participants with this: if you ran for office, you are probably a competitive Type -A, so you probably like to crush a test, especially an easy one. For individuals, if you need to learn about each of these before testing, then make a copy this page and then seek the answers before testing yourself. These can be answered as a group as discussion prompts.

Facilitator may invite participants to score themselves, then write in the correct answers as the facilitator walks through each question. This is also an opportunity to get participants to write down some aspects of the process and legal parameters that they would like to better understand.

There are only four "True" answers. If these are not clear to you, you probably shouldn't facilitate this section.

**There is no entrance exam to run for office or to be allowed to serve on a public board or council, just as there is no exam to become a parent or other important roles. Yet, there are things to know if you intend to be effective on a board**



## ROLES & RESPONSIBILITIES

Defer to the Manager on whether to use this section or how best to frame the discussion. The important thing is that the Council – Mayor – Manager relationships be discussed because inevitably boards need reminders of their scope, and ignorance or disregard for side-boards can become an underlying or overt source of conflict.

The questions are designed to help new board members think about their own imprinted structures. If the Quiz was discussed in detail, this section may be somewhat repetitive.

The questions about operational frameworks in different settings, work, home, are intended to help folks ground the roles of a board and manager in their own experience. While adhering to roles may be obvious in other contexts or from experience, discussing those first may be an easier entrance into more difficult discussions, especially if this discussion is occurring because of a breach. It may also help the group discover who has experience on a board.

The exercise in this section could lead to a significant discussion that can be very difficult for some managers to have, and for many board members to respect. An experienced board enforces it's own sidebars with regard to these roles. This should be done as a group exercise. Manager should lead or be included.



## PEER INTERVIEWS

This is best done with new board members, or for integrating new and experienced board members. The purpose of this section is to get individuals to practice listening skills, to humanize peers, and to practice summarizing and reporting-out. If much of the group is new, it can be interesting after all participant report outs are done to ask if anyone can go around the room and summarize key points remembered about each participant. Individuals are more likely to share more with one person than with the group. It is also an opportunity if the facilitator chooses to record commonalities across the answers.

I like to begin a retreat with this exercise. If both interviewer and interviewee are board members, they can switch roles and do a second interview before reporting in.

If participants don't know each other and this is the most important focus, skip the two step impressions process below. That is useful if there is already a building distrust between incoming and existing board members to be addressed.

1. With or without a retreat, an incoming board member can use the Peer Interview sheet to provide structure and an excuse to "interview" existing board members (or participating staff leaders) to get to know them.
2. As a facilitator these can be used various ways.
  - Have peers interview each other (two they know the least) and summarize back to the group what they learned. Summaries show listening skills and clarity of communication. Having people interviewed and hearing summaries shared out loud by two others adds layers for discussion about self-perception or assumptions made by others. Facilitator can write key words across all summaries on whiteboard to show shared experiences, or values. Facilitator can ask interviewers how their perceptions changed from before to after interview. Discuss why this is valuable.
  - Instructions can be provided as follows:
    - Step 1: If you have impressions about the person you are going to interview, write them on a separate sheet of paper or on the back of this sheet before interviewing.
    - Step 2: Interview and write summary of answers on the form. If you are brave, listen thoroughly first then take a minute to write summary before asking the next.



## MEETING PRACTICE

I have sometimes begun this training with videos obtained by “Googling Dysfunctional Town Council.” It can be funny and painful to watch. Most local boards emphasize business over performance, but it can be a fine-line from debating to grandstanding to trying to publicly humiliate peers. After the videos, I usually prompt with questions such as: how did this make you feel as an observer? What clues do you have as to how others in that room felt? What do you think this does for the public trust? For the organization appearing to be open for business? How do you think this might have started? How does this board want to be perceived? It is also a time to emphasize that it is unrealistic to expect that a group of people will be put in a public setting with pressure and expect to interact at their very best without training and some “meta” discussion about how they interact.

Understand the Motions and Norms for your Meetings: This is a matter for discussion because it is different in various places. Most of the local governments I work with are relatively informal, only following a loose version of Roberts Rules of Order. Meetings are not rocket science, yet boards butcher them and embarrass themselves on every night of the week somewhere. Google “Dysfunctional city council” and watch some videos. Most don’t descend into that place in one evening. Don’t be that board. The three areas of a meeting you should take some time to deconstruct are these:

1. Meeting Process, and how a meeting is organized
2. Approaches to different Content on the Agenda
3. Discussing together how to handle possible scenarios

Scenarios Exercise: facilitator should, ideally, work with the Manager to come up with some hypothetical meeting scenarios and have cue cards for key players to act out. The ones listed are only meant for suggestion. Scenarios can be as simple as someone posing as an audience member coming to the podium with a topic and cues for their tone – pointing, ranting... Be careful to not use scenarios that exactly replicate past issues (or those currently under consideration). Scenarios can be brainstormed with the group.

The Setup: Ideally, put the players in a physical seating arrangement parallel to the situation. If the session is in the board room, put them in those chairs. Advanced facilitation—have prepared “actors” play the difficult public roles. In running the exercises out, can either let scenarios play out then stop and discuss, or “pause” and discuss along the way. This is really Mayor training.

Discuss likely Difficult Situations: There are many situations to discuss as a group and practice, although few boards take the time to do mock meetings together and work through hypothetical situations. I recommend that the do this in a Worksession or at a retreat with new board members. Doing so can be very empowering. It will make board members more confident. It also has the benefit of allowing discussion of how board members actions and styles impact each other.

I’ve facilitated retreats for boards in conflict who don’t see a way out of maladaptive patterns that continually repeat. These often develop over time, yet Mayors or Managers often fail to see issues festering (or if they fear interceding). When conflict seems to persist from one agenda item into later items, or from one meeting to the next, it is time to provide space for the issue to be addressed before it develops into a deep rift between board members, or board and staff. This is easier said than done.

**It is unrealistic to expect that a group of people will be put in a public setting with pressure and expect to interact at their very best without training and some “meta” discussion about how they interact.**





## COMMUNITY STORYTELLING & MEDIA SKILLS

This may sound way off track as opposed to media relations. Trust me, it isn't. As an elected leader I saw myself regularly translating between the organization's actions/intent and how the public perceived those actions. This goes on in meetings, in the grocery store, post office, in the hallways at work. As a leader, you are expected to try to understand a citizen's perspective (story) and also understand the organization's (story) and navigate between them to a better understanding. Old school governance is not caring about this. Rules are rules, decisions are decisions. In the absence of information or a counter-narrative, citizens will connect their own dots to create narratives in their own way.

As someone elected from the citizenry in many ways, it is your job to explore those narratives and either challenge the organization to confront them strategically with change, or to actively counter narratives that are incorrect, especially if they are corrosive to what you and the organization are trying to accomplish. As a citizen turned board member, you are uniquely positioned to change the narrative in a way that staff usually is not.

**In the absence of information or a counter-narrative, citizens will connect their own dots to create narratives in their own way.**



## PLACEMAKING QUICK ASSESSMENT

In my humble opinion, there is no role more important for local governments than as purveyors of place. Amid the lot line adjustment, zoning issues and various small land use applications, this can be difficult to see. A town is merely an accumulation of decisions made by individuals and groups over time. Making a study of places is one of the most empowering things a local leader can do. As elected officials learn more, they often see the places they visit, and their own neighborhoods with new eyes. Everything in the build environment is a result of a regulatory setting and a decision made at some point in time. Some places have very strong vision documents backed up with land-use guidance documents, though even those often suffer from regular staff and board turnover and have trouble sustaining a strategy or vision for place. At the very least, while in office, the officials who have the decision power should understand those decisions in a larger context of building and sustaining community through place.

Making land use decisions is difficult. It also may be the most important role among many roles for elected leadership. For some places, reviewing land use files is perfunctory. In those places electeds just see themselves as processing applications. At the other end of the spectrum, public comment on certain land use files can reach levels of passion only reached in the context of sports. For some, the vehemence can approach blood sport. Citizens can believe that a nearby proposed development is going to absolutely destroy their community. If that development fits into a vision or strategy that requires change, that may well outweigh a few weeks of passing grumbling. Many electeds neither intend to be a rubber stamp or support a NIMBY wall preventing progress. There are many electeds who just go into meetings and take the path of least resistance, following public outcry who have no strategy or larger vision of place. If you are a feather, there is always the wind. The future does not often come to testify in a hearing.

Unlike many decisions, most land use decisions become the "built environment" and define places for decades if not generations. Yet we often try to hold equal time in a meeting to a decision with passing impact with another that could have a role in defining the community for a 100-years or more. In my experience, most elected officials don't

**A town is merely an accumulation of decisions made by individuals and groups over time. Making a study of places is one of the most empowering things a local leader can do.**

understand land use planning. Worse, they often run for office because of some development near their home that they don't like. They may have some philosophical angle on it left over from other contexts – pro-property rights, no red tape, or anti-development/anti-growth/NIMBY beliefs.

The truth is a place is just an accumulation of decisions that leaders made over the years to allow or not allow investment, investments made or not made in public amenities or decisions to allow or not allow changes to land use. I have driven through many towns admiringly, and driven through others asking one block after another—who allowed that to happen?

At the very least, elected officials should understand the basics of the land use process, and the basic documents adopted to direct those decisions; even better, they should understand their role in place-making and see decisions as a part of a larger strategy.

There is a middle way. There are many middle ways, in fact.

These questions are intended to get the group thinking about place in a more conceptual way than how most Community Development or lead Planners often tend to introduce a site-specific development plan. Place making is a combination of planning, economic development, public-investment in amenities, knowing what you want and getting out of the way for people to define a place which sometimes includes developers.



# resources

## NOTES



**Local Leaders in Colorado have excellent institutional and peer support networks. Below are a highlighted few.**

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### **The Colorado Municipal League (CML)**

**[cml.org](http://cml.org)**

Advocates for municipal interests, holds conferences, trainings and other peer connection opportunities. They also publish a newsletter and other publications on important topics available to member jurisdictions.



### **Colorado Intergovernmental Risk Sharing Agency (CIRSA)**

**[cirsa.org](http://cirsa.org)**

A municipal self-insurance pool providing proactive risk management guidance, trainings and consultations. Contact CIRSA through your Manager.



### **Colorado Counties Incorporated (CCI)**

**[ccionline.org](http://ccionline.org)**

Advocates for County interests, holds conferences, trainings and other peer connection opportunities.



### **Colorado Department of Local Affairs (DOLA)**

**[cdola.colorado.gov](http://cdola.colorado.gov)**

A state agency unique to Colorado that provides data, technical assistance and grant opportunities to support local governments. They are also charged with assisting local governments in resiliency planning and Disaster response and recovery. Each jurisdiction is assigned a regional representative.



### **Regional Councils of Governments**

**[nwccog.org](http://nwccog.org)**

Provide a variety of services on behalf of their local government members, as well as direct services to citizens. Their purpose is to provide a regional perspective and approach to local challenges. This publication is a product of Northwest Colorado Council of Governments as a service to the membership, providing a tool to assist local leaders get a strong start towards being effective in their governance for their communities.

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For Suggestions for further study, or to provide feedback on this first edition document:  
Please email [jstavney@nwccog.org](mailto:jstavney@nwccog.org)





## New Council Member OnBoard Checklist

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Council Member: \_\_\_\_\_ Date of Election: \_\_\_\_\_ First Meeting Date: \_\_\_\_\_

### **Administrative Prior to First Meeting**

- ☐ Congratulatory Call from Mayor or Manager, confirm first meeting, schedule other on-boarding items below
- ☐ W2 or I9 if paid, Identification for file, Background Check if per policy
- ☐ Keys, card, or code for access to town hall
- ☐ Benefits review and paperwork (if any)
- ☐ Email Account established
- ☐ Nameplate for meeting room
- ☐ Name tag created
- ☐ Welcome letter from Town Manager or Staff
- ☐ Computer, iPad, or other device ordered for viewing files
- ☐ Schedule Photographer, notify of date and dress code expectations if any (group or individual)
- ☐ Add Bio and photo to website and/or to standard wall location
- ☐ Prepare Introductory Binder or files, access to Google Drive, with Key Docs: Charter, Budget, Vision, etc.
- ☐ Prepare Office Space if provided, clear of prior personal items
- ☐ Copy of CIRSA/CML: Handbook for Elected Officials
- ☐ Copy of Contact Sheet of Staff and Council Members, Meeting Schedule

### **Schedule (if possible) Prior to First Meeting**

*The following items can be done as one-on-one or with group of newly elected, or entire board.*

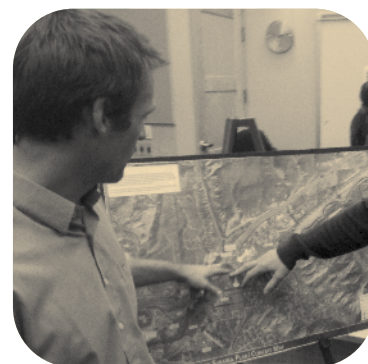
- ☐ Meeting with staff to cover Administrative Items above
- ☐ One-on-one to cover adopted budget      Responsible Party Budget Review \_\_\_\_\_
- ☐ One-on-one to intro to Town hall and staff      Responsible Party for Walk Through \_\_\_\_\_
- ☐ One-on-one intro to Planning, Land Use Docs      Responsible Party for Planning/Land Use \_\_\_\_\_
- ☐ One-on-one intro to Packet, Meeting Process      Responsible Party for Meeting Basics \_\_\_\_\_
- ☐ One-on-one overview of Town processes with Town Manager
- ☐ Mayor and Manager discuss seating Chart
- ☐ Tour of Facilities (Group of individuals)      Responsible Party for Facilities Tour \_\_\_\_\_
- ☐ Group meet and greet, or celebratory meal with past, present, and incoming with staff prior to Swearing In
- ☐ Introduction to Colorado Open Records Act (CORA) Responsible Party for CORA intro
- ☐ Basic Media and Social Media Training

## **First Meeting**

- ☐ Schedule Judge, Clerk or other to Perform Oath
- ☐ Notary to sign Oath
- ☐ Clerk presents certificate of Election (preferably Framed)
- ☐ Reminder: recognition for Outgoing, Thank You, present Certificate of Thanks, Nameplate, etc.

## **First Three Months**

- ☐ Schedule One-on-one check ins
- ☐ Be sure every department director has been introduced to new Council
- ☐ Ask if Council Member would like review of anything covered previously, or desires training?
- ☐ Ask Council Member if they feel they have everything they need to succeed (If not, what would help?)
- ☐ Schedule any of the above Checklist Items which may have been omitted
- ☐ If no Retreat Scheduled, be sure to ask
  - What would you like to accomplish during your tenure?
  - How do you think council meetings could be improved, is the amount of info from staff sufficient?
  - How are council relations, how is it making decisions as a group, do you feel respected?
  - What is the organization doing well and what do you see could be improved?
- ☐ Ask if Council Member would like review of anything covered previously, trainings
- ☐ Ask Council Member if they feel they have everything they need to succeed in their role?
- ☐ Ask if Council would like Ride-a-Long with Police, Public Works, Facilities, or other Departments
- ☐ Discuss state, regional, and local committee assignments and available meetings/resources to understand issues and identify areas of interest
- ☐ Schedule CIRSA Training on Ethics & Best Practices for entire Board/Council



**COLORADO**  
Department of Local Affairs

The purpose of the Northwest Colorado Council of Governments is to be responsive to our members' needs and interests by providing guidance and assistance in problem solving, information sharing and partnership building, advocating members' interests and needs with local, state and federal entities, and providing quality services to our membership that are relevant, effective, and efficient.

For PDF copies of this report visit [nwccog.org](http://nwccog.org). To request hard copies contact [office@nwccog.org](mailto:office@nwccog.org).

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