

## Agenda Item 8

### **SERDI Regional Assessment**

**Summary:** Staff recommends hiring the SouthEast Regional Directors Institute to lead the Council on a 360 Organizational Assessment at a cost not to exceed \$7,500 beginning the process in August 2018. The assessment is designed to identify how the Council is perceived by local government customers, to identify strategies to strengthen those relationships and to identify or reinforce projects or strategic areas where the Council should be working.

**Who is SERDI:** The SouthEast Regional Directors Institute is a voluntary professional development association for regional council executive directors, and when appropriate, their councils and state associations in 12 southern states including Virginia. Since 1994, Institute staff and retired Regional Directors have assisted Regional Councils with internal reviews and strategic planning recommendations. Eight of the Virginia Regional Councils have already been through this assessment.

#### **Process:**

**August:** An electronic survey will be completed by members of the Council, other local elected and appointed officials, and other regional leaders whose opinions are valuable. Survey questions will include:

- What's good about the Council
- What concerns you about the Council
- What is the most valuable thing you receive from the Council
- Is there an opportunity out there that you think the Council should be engaged in that it is not
- If you could change one thing about the Council what would it be

**September:** There would be up to six focus group sessions (1 1/5 hours) facilitated by SERDI staff over parts of September 17-19. We determine how the focus groups are shaped, but it could be:

- By geography
- By sector
  - Managers/Administrators
  - Planners
  - Economic Developers
  - Workforce
  - Staff

Some of the same questions in the electronic survey will be asked, but these focus groups will allow the facilitators to get more in depth answers about their perspective of the Council and how we can increase our relevancy and usefulness to our customers.

We would have an expanded meeting on September 20 for SERDI staff to lead a review of the comments heard and conduct a strategies work session, not to exceed 1½ hours. SERDI will

present several preliminary rough draft strategy recommendations for discussion and seek strategy recommendations from the Council as well.

**October:** SERDI will submit a complete record/report of the Council assessment including final recommendations.

### **Strategic Planning**

Staff has been working to compile those goals and initiatives that have been identified in various regional strategic plans. Once refined, we can send those goals to our localities for their consideration.

This SERDI assessment process would be helpful to confirm that our localities agree with the goals and initiatives refined in the compilation of the plans and to solicit additional perspectives and ideas.