

LAKE COUNTY



March 2025

Governance, Organizational Effectiveness and Priority Development Workshop

Executive Summary by Robert Bendorf, Municipal Resource Group

EXECUTIVE SUMMARY

The Lake County Board of Supervisors and the County Administrator engaged with Municipal Resource Group to deliver a training workshop focused on general governance, priority development and organizational effectiveness. The workshop was held on March 21, 2025. Robert Bendorf, a consultant with Municipal Resource Group, facilitated the in-person workshop.

All board members were present along with the County Administrator, County Counsel, and several department heads. In addition, several attendees from the public attended. The workshop began at 9 a.m. and concluded at approximately 3:00 p.m.

The training workshop consisted of the following elements;

- Organizational Leadership
- Effective and efficient governance
- Board and Department expectations of the County Administrator
 - Day to Day responsibilities of the County Administrator
- Development of Priorities

The workshop was very engaging, with each member of the Board of Supervisors participating in an interactive fashion with their colleagues, department heads and the facilitator. Common themes discussed were;

- Importance of a system approach to decision making for the Board of Supervisors and the resulting impacts on the organization
- Development of a strategic plan with actual “action” items and what are the actual strategic priorities of the Board of Supervisors
- Identification of clear expectations and responsibilities of the executive for the County (County Administrator) to provide alignment with the Board and it’s leadership team

WORKSHOP

Good Governance

Organizations become effective through alignment of a governing body, leadership and implementation of priorities and recommended policies. All topics discussed at the workshop were focused on all parties working together to develop service solutions that eventually produce quality outcomes. The Board of Supervisors appears very focused on achieving more efficiencies and eliminating bureaucracy that tends to hamper the achievement of goals and objectives.

One of the issues discussed was the role of a Board member and how that can be transformed into a more robust organization that can achieve the priorities it sets out to achieve. Attendees were reminded of the concerns held by the national and state survey sentiment about their thoughts of local, state and federal governments. Studies have shown that confidence in their government(s) continues to decline. While local governments tend to be held more favorable than state and federal, confidence continues to wane. This barrier can be mitigated by working collaboratively together (all members of the organization and the public) and focusing on a set of strategic priorities that can be monitored and measured for the benefit of the entire county.

Expectations

The Board of Supervisors and Department Heads in attendance completed an exercise that identified expectations of the County Administrator. Results of the exercise included;

Board Expectations of a County Administrator

Follow through	Work with Supervisors on county projects
CAO identifies process (for BOS direction provided or priorities)	Provide relevant information to BOS members
Provide Board feedback	Prep Board for meetings, initiatives in place
Implement/Coordinate Conduct	Support District Supervisors and their priorities
Coordinate with elected officials (Dept. Heads)	"No Surprises"
Speaking up	Clear communication
Assisting with complexities of governance (with BOS)	Human Resources
Budget	

Department Head Expectations of the County Administrator

Human Resources (effectiveness)	Budget (coordination)
Policy Follow-Through	Strategic Planning
Intergovernmental Relations	Board meetings
Resource broad resources	Department Liaison (for the BOS)

Legislative Analysis

Discussing and identifying expectations of the County Administrator is important and they should be reviewed annually. This type of discussion / exercise is a critical link in allowing organizations to achieve alignment, thus producing quality work that benefits the greater good, making overall positive impacts for communities throughout Lake County.

In addition, the expectations identified are an important piece of day-to-day governance for not only Lake County but for all professional organizations. Knowing what the expectations are, combined with effective leadership, are key to successful outcomes. County operations are complex enough, and when faced with lack of clarity on who is leading those operations or what the expectations are, can result in priorities not being achieved. As an example, does a department head take direction from an individual Board member or the County Administrator? What if five Board members are independently providing direction on the same issue, (unknowingly) to a department head and those directives are not similar? Add to that the County Administrator provides direction, almost daily, based on policies adopted by the Board of Supervisors.

Typically, the roles and duties of the county's top executive are codified in a local ordinance and not just simply in a job description. Lake County does not have a local CAO ordinance. This is certainly their prerogative and can work for a period of time, however management of organizations are becoming more complex, state and federal rules and laws are changing constantly, and employment laws becoming more involved. It is my opinion the top executive should be providing daily leadership of county operations, including evaluating top executives, and being the person hiring department heads (as indicated by statute and Board desires) and releasing them if warranted. These opinions are not to meant to infer a "power grab" of an organization's top executive or give a person too much authority, but simply put, it is a tested and proven practice for private and public sector agencies.

Finally, Identification of a leader and the associated expectations should be specific. Regardless of the model used by the Lake County Board of Supervisors, such as a Chief Executive model (CEO) or County Administrator model (CAO) model (it is currently a CAO model), the "model" titles can be a misnomer. Whether a county's top executive is identified by title as a County Executive or County Administrator, it really doesn't matter. What matters are the expectations and related policies adopted by the Board for their lead executive officer. There isn't a fine line between the two that specifically delineates associated executive duties, as some County Administrators have the same authority as a County Executive.

As an example, the executive may have the ability to hire and fire certain appointees but needs to consult with the Board, or conversely the executive may be able to without consulting. Evaluations of top executives can be done by the CAO or CEO in consultation with the Board or completed by the top executive and informs the Board on the evaluations.

Regardless, an organization's Board members need to decide what that path is, codify in policy or ordinance, identify expectations not only for the top executive, but for departmental leadership. The Lake County Board of Supervisors is encouraged to visit this topic soon and develop the appropriate policies or ordinance(s) that makes it clear to all.

Priority Setting / Strategic Planning

There is a current "vision" for Lake County but it lacks specifics. The Vision model provides a a general sense of where the County wants to go, but it stops short of providing a robust vision, strategic priorities and action items

necessary to accomplish objectives. In summary, there is not a common “sheet of music” that the organization’s employees or the Board of Supervisors can refer to and also provides a specifics for future actions and accountability.

During the workshop, the Board and attendees devoted a few hours to identifying focus areas, strategic priorities action items, project leads and time frames. With the limited time available, outcomes of the collaborative work between department heads and Board members were impactful and meaningful. Outcomes included a draft of;

Development of Focus Areas

Public Safety
Infrastructure
Workforce and Organizational Excellence
Economic Development
Budget and Fiscal Stewardship

Strategic Priorities (including but not limited to)

Emergency Preparedness
Road Repairs
Enhancement of Revenue
Citizen surveys
Innovation
Customer Service Training

Attached to this document are summarized worksheets of the above, providing more detail. To be clear, development of these draft priorities were part of an exercise that should be incorporated into a holistic strategic plan including the involvement of all department heads, potential survey of the community on their priorities, development of a mission and vision and a plan to communicate strategies throughout the organization and with the public.

It is recommended the Board examine opportunities to have that interactive process consisting of a few workshops with their department heads and key staff. This type of initiative allows for:

- Common understanding of priorities and expectations throughout the organization
- Enables the tracking of progress
- Celebrates accomplishments
- Accountability
- Provides for organizational alignment
- Flexibility to respond to internal or external changes.

In summary:

- Core values should also be developed and shared throughout the organization along with a memorable and meaningful mission and vision.
- Action items should be connected to priorities.
- An update / reporting out process developed for any type of long-term vision or priority setting.

CONCLUSION

Considering the engagement of Board members and staff at the workshop, Lake County is on a positive trajectory. Discussions indicated the Board very much would like to complete a strategic plan to assist in mapping out its future which this consultant strongly recommends.

During exercises to determine draft priorities and focus areas, Board members were assigned to work with different department heads. Discussion outcomes were amazingly similar among the groups, with specific reference to focus area and strategic priority development, indicating the Board understands their colleagues' priorities well and importantly, countywide needs. Having all of the department heads present to work with the Board in developing strategies is key, as the policy setters and subject matter experts combined make for more comprehensive and meaningful results.

Lastly, the Board of Supervisors is encouraged to evaluate its leadership model for day-to-day county operations, with a nod to codifying expectations in a local ordinance. The Board of Supervisors recognizes the benefits of having long-term leadership in their County Administrator and have experienced the stability it brings with former administrators and the current CAO. The Board and CAO are also encouraged to focus on succession planning in not only its County Administrator position, but throughout the organization. It will build strength from within departments and offer opportunities for those choosing to grow with Lake County.

Thank you for the pleasure of working with everyone. It has been a pleasure, and having a rural county background, it is refreshing to see the focus among county leaders in smaller and medium sized organizations focusing on the big picture and accomplishing fantastic outcomes for their residents.