FACILITATOR BACKGROUND AND REFERENCES

Gibson, Lorrie (assigned to Meredith)
Gibson Strategic Planning, Strategic Management Consulting

Lorrie Gibson is located in central Illinois. She provides consulting services for Strategic Planning and Strategic Communications. She has worked with both for profit and not-for-profit organizations including several park districts. She was a presenter at the IAPD/IPRA state conference this year. Corky attended her workshop and was impressed with her message.

BACKGROUND

Lorrie's method of team building with Boards is to focus on the strategic plan, and her philosophy and expertise lies in utilizing the planning process to develop the team process. By utilizing the strategic plan Boards can:

1. Build a team
2. Develop shared Goals
3. Shared Emphasis

An example of her "Core Retreat" is:

- Reaffirm mission (brief)
- Environment and SWOT Analysis
- Vision (where we want to take this thing, the long term goals)
- Goals and Critical Issues (12-18 months out)
- Staff and Board work to build specific objectives by and when and develop action plans for the next 12-18. The rollout of the strategic plan should occur through short term steps to meet the long term goals, while celebrating the victories along the way.

This retreat takes ½ day to 6 hours.

Second Session:

After 6-8 Months she conducts a "wellness check" Did something not go well? Around a year get back in the room together and hopefully we have accomplished the goals.

UPD

Considering our specific situation she highly recommends we work on our strategic plan before Vicki leaves so that we have a strategy or vision for the future. I would recommend that if we choose Lorrie, we utilize our current strategic plan in session where we actively use our current strategic plan to identify the "Critical Issues" in the next 12-18 months" By doing this, we work to develop the priorities and set the agenda for the Park District. It's would also leave us with a new tangible outcome and real goals to work to. It would not be about re-doing the strategic plan, but really evaluating what is left and how it should be prioritized.

Before Vicki retires we should have a new strategic plan in place. This will help us with determining how potential candidates fit with the goals and mission of the park district. New leadership will most likely want to do a refresher, but this way we work to hire someone who understands the goals we have set for the Urbana Park District.

FACILITATOR BACKGROUND AND REFERENCES

Availability

October or January 2012

REFERENCES AND CLIENTS

Hollice Clark, executive director, Bourbonnais (IL) Township Park District.
459 N. Kennedy Drive, Bourbonnais, IL 60914
815-933-9905
Hollice@btpd.org

I have facilitated strategic planning initiatives twice for BTPD in the past four years and recently completed an employee survey/employee focus group project to explore ways to improve communication and teamwork at the park district.

Elizabeth Kubal, superintendent of finance and personnel, Bourbonnais Township Park District
459 N. Kennedy Drive, Bourbonnais, IL 60914
815-933-9905
Elizabeth@btpd.org

I am currently working with Elizabeth on the development of a new performance management system for BTPD. Elizabeth has also been involved in my strategic planning and focus group projects with BTPD.

Velma Gordon, director of human resources, Baxter Healthcare Corp., Round Lake, IL
847-270-3850;
velma_gordon@baxter.com

Working through Ms. Gordon, I have facilitated strategic planning retreats twice since 2009 for the Round Lake facility of Baxter. In addition, Ms. Gordon is a member of the Lake County Workforce Investment Board for which I also have facilitated strategic planning retreats three times in the past five years.

Rick Manuel, board of directors, Wright in Kankakee.
701 S. Harrison Ave., Kankakee, IL
815-939-1611
rick@endowthefuture.com

I recently facilitated the initial strategic planning sessions for the board of directors of Wright in Kankakee, a non-profit group formed in the past year to preserve and open to the public a home built in Kankakee by Frank Lloyd Wright.

Larry Huffman, former president of Kankakee Community College
harryluffman@yahoo.com

I reported directly to Dr. Huffman for 15 years as vice president for marketing and planning at Kankakee Community College.

FACILITATOR BACKGROUND AND REFERENCES

REFERENCE

Ms Blumthal, thanks for contacting me for a reference for Lorrie Gibson. My experience with Lorrie is of a positive nature. The park district has used her services for our strategic planning, employee survey, employee focus groups and recently on revising our performance review system. Her professionalism shows in every project that she has done for us. Lorrie is great at her job and is willing to listen to your concerns and adapting a program that would work for your particular area.

I have known Lorrie professionally at my previous employer and I contacted her when I became Executive Director to facilitate the strategic plan initiative. Lorrie is a person with high energy and is willing to go the extra mile for an organization. Her value that she has brought to the Bourbonnais Township Park District is un-measurable. In conducting the focus groups she worked with us to get to the root of many issues that was occurring at the park district. After the focus group sessions, she worked with myself and human resources to map out a strategy to correct some of these issues from the past. Since our wrap up meeting with staff I have seen morale and teamwork improve 100% and I have Lorrie to thank for her guidance and strategy.

As the Executive Director and professional I would recommend to you to utilize Lorrie skills for your park district. We are planning to review or strategic plan in the next six months and my board of commissioners is requesting that Lorrie facilitate the session again. Yes I will continue to hire and utilize Lorrie services to improve operations at the park district.

If you would need additional information please do not hesitate to call or email me.

Hollice Clark III
Executive Director
Bourbonnais Township Park District
459 N. Kennedy Drive
Bourbonnais, IL 60914
Phone: 1-815-933-9905
Fax: 1-815-933-5468
hollice@btpd.org
www.btpd.org

FACILITATOR BACKGROUND AND REFERENCES

Heller, Barbara (assigned to Nancy)
Heller and Heller Consulting, Inc.

Barbara Heller offers consulting services for Organizational Development, Strategic Planning, Organizational Culture/Change, and other services. She is a frequent presenter at the IAPD/IPRA state conference, NRPA conference and at NRPA Revenue Resources School. Barbara is a parks and recreation professional. She is the former Executive Director of Elk Grove Park District in Illinois. Vicki has worked with Barb on several occasions.

BACKGROUND

REFERENCES AND CLIENTS

I (Nancy) finally heard from one of the references for Barb Heller. Jason Herbster is Executive Director at Crystal Lake Park District. Barb Heller did a daylong board retreat for their new board composed of 2 long term commissioners and 3 newly elected. They ran the meeting as an open meeting.

Jason felt she did an 'outstanding ' job. She listened well to what they wanted done and did a great job of tailoring her presentation to what they needed. (Something I felt our last facilitator did not do well.) She got them through some potentially sticky discussions with grace. She is laid back and she got all board members working together.

He felt it was a 'great experience' to work with her. It is unlikely that any other of my calls will respond before tonight so even though my sample size is small I would feel comfortable working with Barb Heller. She was easy to talk to on the phone, her printed material seems good, and Jason was quite willing to hire her again.

FACILITATOR BACKGROUND AND REFERENCES

Michaels, Beth (assigned to Bob)
Primer and Michaels

Beth Michaels is located outside of the Chicago area. She offers consulting services for Strategic Planning, Workload/Project Management, Culture Development, High Performance Leadership Teams, and Leadership Development. She has worked with for-profit and not-for-profit organizations including several park districts and school districts. She has presented at the IAPD/IPRA conference. Bob, Meredith, Deb and I have been in her sessions.

BACKGROUND
UPD Board has decided to pick from four potential consultants to work with us on board development. I volunteered to research references for Beth Michaels. My first contact with Beth was at the 2010 IAPD State Conference. I attended two of her classes on board development. I came back to Urbana and encouraged the board to consider working with her.

Earlier this year, I went back to these same sessions. This time Vickie, Deb, and Meredith also attended the sessions. We had Beth work with the board last year. I have been happy with the work Beth has done with UPD. We all have direct information about Beth and the work she is capable of.

Because I have so much information about this consultant, I was not sure what additional information would be helpful to help to answer the concerns other might have. I met with Nancy to see what questions she has. This information allowed me to call Beth Michael's and to request persons I can call for references.

I contacted Beth and requested references. She indicated that she doesn't have any contact information for any individual Board Members. She put together this list of Park Districts, Special Recreation Associates, and Forest Preserve Districts she has been working with currently or recently.

REFERENCES AND CLIENTS
"Hi Bob – thanks for calling and considering my services. With regard to references, please feel free to contact:

1). Dr. Terry Schwartz, Exec Dir Winnetka Park District (just finished working with him and his board on the strategic plan): tschwartz@winpark.org ; (847) 501-2070
2) Ms. Susan Balling, Northeast DuPage Special Recreation Association (did their strat plan and she sponsors our IPRA presentations): sballing@NEDSRA.org (630) 620-4500 x120
3) Mr. Dan Schimmel, Exec Dir Buffalo Grove Park District (facilitated their annual planning and staff action team work for many years / also a sponsor for IPRA: Dan_Schimmel@bgpkr.org (847) 850-2109
4) Ginny Bateman, Oswegoland Park District (strat planning and staff action team for many years): gbateman@oswegolandpd.org (630) 554-1010
5) Marcy DeMauro, Exec Dir Will County Forest Preserve District (ditto); mdemauro@fpdwc.org (815) 722-5985

Thanks again for your encouraging words. Again, let me know if there's anything further I can do.

Warm regards, Beth A. Michaels"

FACILITATOR BACKGROUND AND REFERENCES

"I am Bob Stewart and I am a commissioner on the Urbana Park District. We are working to better develop our board processes. We want to hire a consultant to assist us in becoming a stronger board.

We have a strong executive director in Vickie Mayes. She is encouraging the board to develop a board policy book and to work for the Distinguished Agency Certification.

We have some board resistance on spending money for a consultant, when we are all college educated and reasonable people. Would you be willing to answer these few questions (regarding your working with Beth Michaels of Primer & Michaels), and E-mail me back or call me at (217)621-2622? I don't need lengthy responses.

I thank you for your time and consideration.

Sincerely Bob Stewart"

I FAX'ed the same questions to all five of these people. I received three responses within a few hours and a fourth the following morning. I never heard back from Marcy DeMauro of the Will County Forrest Preserve District. A sampling of responses to my four questions follows:

1. WOULD YOU HIRE MICHAELS AGAIN?

Absolutely. Beth is top notch. It is money very well spent and should be a priority to have an independent person in the room when Board and staff are trying to improve and become stronger. SUSAN BALLING

Thank you for the opportunity to provide a reference for Primer/Michaels Associates. I am happy to provide you with the following information:

Yes. I personally have coordinated 4 or 5 years of strategic planning sessions with Dale Primer and Beth Michaels. I have found them to be very good at bringing Board, Administrative Staff, and line staff together in these 1.5 day planning sessions. Dale has also proven to be helpful to our former Executive Director and myself at "status" meetings where he checks to see how we are progressing. DAN SCHIMMEL

Hi Bob, I am the Director of Recreation and Marketing and, with our Executive Director at the time, interviewed and selected Beth Michaels to work with our staff on developing values as an organization. It was a difficult and sensitive series of conversations. She brought us through a process to a set of values that we continue to use to this day. The words are common to a lot of organizations, but her process made them real, helped us to see how they would play out every day. She also helped to assess

our progress on our strategic plan, leading a group of staff, board members and public. Yes. GINNY BATEMAN

Yes, Beth is excellent and brings to the table an understanding of a board member in the public sector to the process. TERRY SCHWARTZ

2. WHAT DOES MICHAELS BRING TO YOUR BOARD OF DIRECTORS?

She is professional, easy to work with, understands Board/staff roles and relationships, has excellent facilitation skills, really listens to your goals and what you are trying to accomplish by bringing in a consultant. SUSAN BALLING

They [Beth and Dale] emphasize that a Board is to set the priorities, the budget, set the Mission and policies, and to hire the Executive Director. The Director is responsible for putting these plans into action. Once that is done, the Board should be supportive of the staff and the Park District Mission.

I have attended three half-day workshops at the IPR Conference where they discuss Board Staff relationships including communications, conflict resolution, responsibilities of each party, moving forward as part of the team as opposed to continuing to forward your personal agenda, and several other important issues. They emphasize that a Board is to set the priorities, the budget, set the Mission and policies, and to hire the Executive Director. The Director is responsible for putting these plans into action. Once that is done, the Board should be supportive of the staff and the Park District Mission. DAN SCHIMMEL

She brings a depth of knowledge of how individuals and groups interact, and uses that knowledge to move the group toward the goal. At the end of the process there is an energy and commitment to the outcome because of the comprehensive and respectful way she works with a group. GINNY BATEMAN

Credibility as a consultant and a former board president. TERRY SCHWARTZ

3. HOW WOULD MICHAEL'S HELP IN DEVELOPING A BOARD TEAM (THE BOARD AND ED)?

They are totally impartial – which is VERY important. They are an objective voice in the room to bring a variety of different opinions and positions together to help clarify points of view and issues, to keep people from getting defensive, or territorial about their viewpoint.

FACILITATOR BACKGROUND AND REFERENCES

They do not have a vested in interest in seeing a particular point of view advanced over someone else's. They are very good at using techniques to be sure that EVERYONE's opinions, concerns, priorities are voiced and heard, so that things aren't just driven by those on the board who speak loudest or most often. SUSAN BALLING

- Clarify roles and responsibilities
- Establish Mission and Values of the agency. Also, establish the Agency Goals. The ED should then recommend the Tactics for achieving those goals.
- Strategic Planning - SWOT Analysis, long and short range planning.

Though I understand each and every board member may be highly educated and professional and able to understand the big picture, it's important to make sure that the Board functions correctly as a Board and that relationships between Board Members and ED are positive and supportive. I think it would be hard to do a Board Development program without a Consultant or outsider facilitating the meeting. DAN SCHIMMEL

She would provide a neutral perspective and help you determine and articulate what you want out of the process so that each person would be working toward a common goal.

She is able to evaluate each individual's concerns (spoken and unspoken) and facilitate a meeting so that each person's perspective is heard.

She can navigate the different personalities and bring them together very effectively.

I think that even with (maybe especially with) bright and capable people, someone who specializes in organizational change and group dynamics can move the group forward more effectively than the group alone. GINNY BATEMAN

When I approached Beth, I discussed how the park district is planning as 8 board members with one (me) thinking as a board members and staff without voting privileges. She is likely to review that method and others from her successful work with other park district operations.

She is not hesitant when discussing and confirming the differences between staff and board work. She will challenge thinking and action that attempts to breech that organizational understanding when making decisions and applying action to planning. TERRY SCHWARTZ

4. HOW DOES MICHAELS COMPARE TO OTHER CONSULTANTS YOU MAY HAVE WORKED WITH BEFORE?

I give Beth Michaels an A+ and others a B or less. She is well worth the money and it is a small investment to strengthen Board and ED relationship which is critical to a successful organization. Cut something else if you have to, but not the $$ for this. SUSAN BALLING

FACILITATOR BACKGROUND AND REFERENCES

It's nice having the two [Beth and Dale] involved in the sessions as they bring different strengths to the table. It's also nice that you have two people leading as people tend to "zone out" at long sessions. I think they are excellent at improving Board relationships, no matter what state they are at. They can deal with the dysfunctional, they can deal with the slightly dysfunctional, they can challenge the high achievers and help them stretch. I think they do a good job of understanding each person they are working with and help bring out the concerns and the strengths to make sure contributions are made by everyone. Personally, I like them. They are high quality people, are honest, and have integrity. I feel like I can trust them to do their best and to develop a strong end product. I'm not sure that will happen with other groups.

Personally, I like them. They are high quality people, are honest, and have integrity. I feel like I can trust them to do their best and to develop a strong end product. I'm not sure that will happen with other groups. DAN SCHIMMEL

She is one of the most effective facilitators I have ever worked with in 30+ years in the field. I have no hesitation in recommending her. She will improve the board and agency if you hire her. My number is 630-554-4430 if you have any other questions. Good luck. GINNY BATEMAN

Immediate follow through with the work that is completed and confirmation that it accurately represents the work product. TERRY SCHWARTZ

FACILITATOR BACKGROUND AND REFERENCES

Sylvester, Nancy (assigned to Deb)
Nancy Sylvester

Nancy Sylvester works out of the Chicago area. She offers consulting services for Boardsmanship, Leadership, Strategic Planning Facilitator including Development of Leadership Goals, Strategic Problem Solving Consultant. She is a parliamentarian and provides Parliamentary Procedure Services. She has also written several books on parliamentary procedure. She is a regular presenter at IAPD/IPRA conference and workshops. She has consulted with for profit organizations and not-for-profit organizations, including park districts. Deb, Bob and I have attended her sessions at conference

BACKGROUND

When I (Deb) first contacted her I found out one of the reasons she has such a large consulting business. Her web site and free publications are phenomenal. When I called and left a message she got right back to me the next morning between two out of town trips! And then she responded to my queries for about 35 minutes. This sounds a lot like the experiences that both Meredith and Bob have had. Perhaps Nancy Delcomyn too I hope!

I have been to several sessions Nancy Sylvester has run for IAPD and found them most helpful for me and the participants there. Whether we call it parliamentary procedure or efficient meetings is unimportant to me.

Following are the email responses to my query (following those are a few I received on voicemail and phone conversations):

REFERENCES AND CLIENTS

SUSAN TRIPHAHN, Illinois Association of Park Districts

Greetings Debbie – Nancy Sylvester is awesome!!! – in fact I have contracted her the upcoming 2012 conference. She will be presenting Parliamentary Procedure and Robert's Rules and Managing Conflict in the Board Room. She has done numerous sessions for IAPD and always gets rave reviews – she really knows her stuff. You can give me a shout if you need anything further

Sue Triphahn, CMP Educational Services and Conference Director
Illinois Association of Park Districts
4476 Sundance Circle
Hoffman Estates, IL 60192 Phone: 847/496-4449 www.ilparks.org

Susan says she is always careful to have a lawyer discuss the issues of Open Meetings and FOIA and that we should not expect our consultant to do that.

FACILITATOR BACKGROUND AND REFERENCES

TIM DIMKE, Executive Director, Elmhurst Park District

Deb - Approximately every two years Nancy provides the Park District Commissioners with parliamentarian training. Several years ago the Board completed a rigorous three-part training program consisting of: Policy Governance training, Boot Camp taught by Ted Flickinger and Nancy Sylvester's program. Nancy attended Ted's Boot Camp and the two of them bonded. Ted then invited Nancy to the State Conference where she presented on several board topics. Nancy is very versatile on any Board topic and especially parliamentarian rules. She has also written several books. She is very down to earth and presents well. Please call me on my cell phone anytime if you would like to talk further

Tim Dimke, Executive Director
Rockford Park District
Office 815-987-8880 Cell 815-289-0700 Fax 815-963-3676
401 S. Main Street Suite 110, Rockford, Illinois 61101 http://www.rockfordparkdistrict.org

RICH GRODSKY, Elmhurst Park District

Dear Deborah - I left you a voice mail message regarding the three questions. The long and short of it is we hired her to go through parliamentary procedures in a way that would help our Board use them properly and to hopefully expedite the length of our meetings. She is a no-nonsense presenter and very professional. Personally I like her style. She made the session easy to understand, whether or not all agreed with her is a different issue.

While she did some training that was not the primary reason she was hired. We worked with her during several planning sessions and she tailored the program to our situation.

She is often a speaker at IPR Conference workshops. I would hire her back in a moment's notice!

Richard Grodsky. Executive Director
Elmhurst Park District
225 Prospect | Elmhurst, IL | 60126 RGrodsky@epd.org
(630) 993-8916 | Fax: (630) 993-8913 | www.epd.org

Rich said that they always do their consultants meetings public and that they are not ever attended by others and they then do not have to have IAPD.

They also have a regular review of their Board Policy Manual every five years and have a 2 board member committee on that.