



Greater Louisville Project

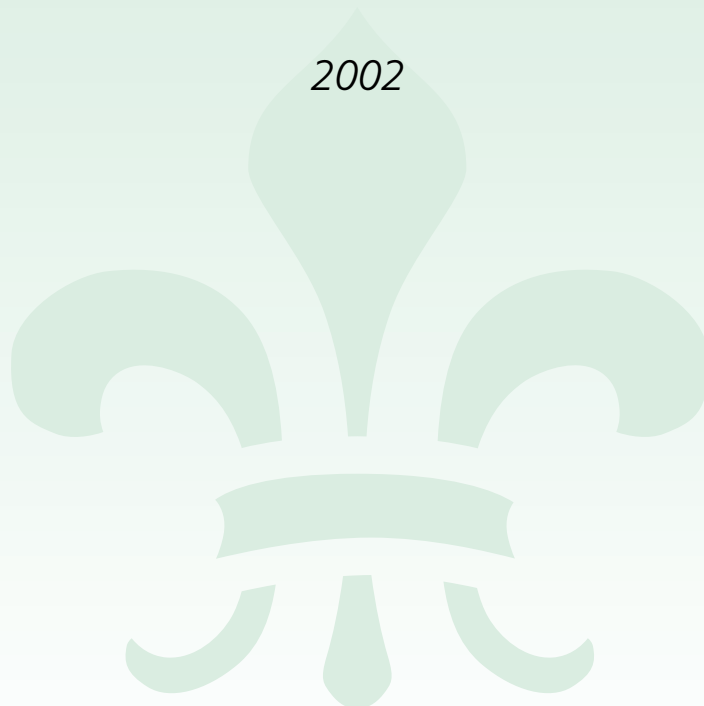
LESSONS FROM THE BEST RUN CITIES IN AMERICA

A Series of Dialogues on Key Issues for the new Regional City of Louisville

Produced with Assistance from
The National Academy of Public Administration

*Making Merger
Make a **Difference.***

2002



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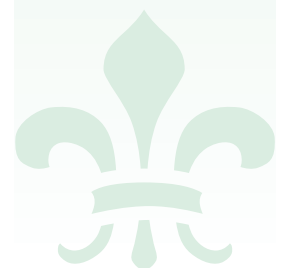
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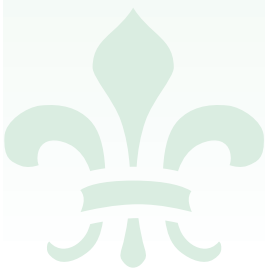
“Lessons from the Best Run Cities in America” was a series of events sponsored by The Greater Louisville Project with the goal of bringing best practice thinking to the design and implementation of the new merged, city-county government.

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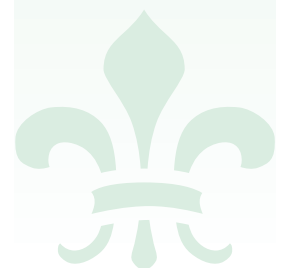
CREATING ENTREPRENEURIAL GOVERNMENT: TOOLS FOR THE 21ST CENTURY

April 25, 2002

"People in this community voted for merger because they were ready to take a leap forward ... I think most of us know that if we just take the city and county governments that we have and put them together we won't ever achieve the kind of efficiency and effectiveness that would allow us to achieve those higher aspirations.

So this is the under-girding we're going to talk about today: How can we fix the basic foundation of government, the nuts and bolts of it all, in order to free ourselves to go after some of those higher aspirations?"

Opening Remarks
Carolyn Gatz, Director
The Greater Louisville Project



INTRODUCTION

✦ What would a local government look like that is designed to meet the challenges of the 21st century?

✦ How would it be organized? What management tools can help it be visionary, effective, responsive?

✦ And how can the best practices in administration be put into effect at the same time that Louisville officials face the tasks of assuring that services continue without disruption when two traditional bureaucracies make way for a single merged city-county government?

Those questions probably were not on the minds of citizens who voted to create a new metropolitan government for Greater Louisville, inspired by the vision that merger would bring new opportunities to the community and its residents.

But they are at the heart of the challenge that faces the new elected officials of Louisville-Jefferson Metro.

This paper offers some answers to those questions presented by four expert panelists when they met in Louisville on April 25, 2002 with a cross-section of about 50 Louisville-area business, government and civic leaders.

If they had one key lesson to offer, it was this:

Local leaders are likelier to achieve the community's most ambitious goals if they reject a traditional, bureaucratic vision of government in favor of an agile, resourceful, customer-oriented entrepreneurial model inspired by the best practices born in the world of business and honed by leaders in the public sector over the past 10 years.

THE PANEL FRAMES THE CHALLENGE

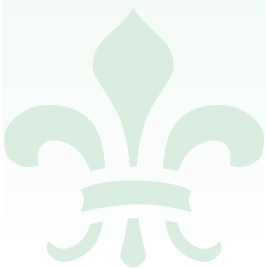
The speakers were:

Ted Gaebler, co-author of the landmark book [Reinventing Government](#). As a consultant who has worked across the U.S. and abroad, he frequently helps governments reevaluate their goals and design new ways to provide services.

"All this requires is for you to take your existing resources —human, technological, capital — and see what you have with new eyes. That's the alchemy of reinventing government."

"Think of today as Architecture 101: We will give you some building blocks, some building materials and you can think about it over the next year, or two, or three — about the ones you want to use."

Pam Syfert, City Manager of Charlotte, N.C., who is a believer in "managed competition" – the solicitation of bids for some traditional government services from private-sector business as well as public providers. Her government also is a pioneer in public-sector use



of a management tool called the Balanced Scorecard. While Charlotte and Mecklenburg County have not merged, they have negotiated extensive consolidation of services over the past 20 years.

"You have a marvelous opportunity. Ask yourself, 'If we were starting all over again to build a city, what would we do differently?'"

Dennis Hays, County Administrator for the consolidated government created in Wyandotte County/Kansas City, KS, in October 1997. While it is smaller than Louisville, that community's recent experiences with merger reflect common challenges — from the nuts and bolts of combining departments to effective communication with the public.

"This is a once-in-a-career opportunity to have a single body set policy for the community, a rare opportunity to speak as one voice ... Take advantage of this time. Wherever you are going as a community, you will never have an opportunity to do this again."

Robert J. O'Neill, President of the National Academy of Public Administration and moderator of the panel. A former executive of Fairfax County, VA, and City Manager in Hampton, VA, he has a record of innovation in performance-based management. An independent, nonpartisan organization chartered by Congress, NAPA assists federal, state and local governments to improve effectiveness, efficiency and accountability.

Louisville is the first city of its size to vote to consolidate local government in 30 years, he said, so it is viewed nationally as a "model for how regions can work together in a more productive way in the 21st century."

"You face a huge opportunity and a daunting task. We think your success will breed significant interest in replication."

WHAT WOULD A LOCAL GOVERNMENT DESIGNED TO MEET THE CHALLENGES OF THE 21ST CENTURY LOOK LIKE?

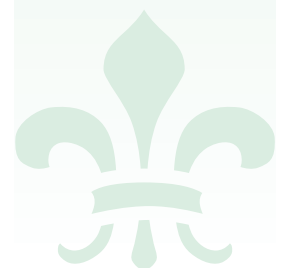
In a word: Entrepreneurial.

It would borrow some of the best qualities from the entrepreneurial business model — setting strategic goals and transforming them into action, encouraging experimentation and finding new ways of solving problems.

It is no accident that Kansas City's chief elected official is called "Mayor/CEO." Or that Charlotte calls its city operating units "businesses" — "We asked ourselves," said City Manager Pam Syfert, "What are we in the business of doing?" Or that Ted Gaebler urges: "We need to take our bureaucrats and let them act like they are owners."

What does that mean?

Entrepreneurial government thinks in terms of citizen/customer needs.



“We’ve always done it this way” may be the traditional mantra. Entrepreneurial leaders build organizations around the outcomes they want for the community — not around decades-old organization charts or rules and long-established operating procedures.

At the same time, they explore creative, non-traditional paths to achieving those goals — by seeking out partnerships, for example, and leveraging their resources to have a greater impact, by working with other community institutions from schools to business.

“Figure out how to take government’s 6 or 7 percent of your local GNP and leverage the other 94 percent to add value to the lives of your citizens.”

Ted Gaebler

Entrepreneurial government asks fundamental questions about its role.

With rising community expectations and limited resources, it looks at the hundreds of services traditionally executed by government and asks questions like: Would citizens define this as a critical mission? Should it be done by this level of government? Can competition cut costs or improve performance? Should we be doing this at all?

“What governments do, the role they play can be decided by you ... Edison didn’t set out to improve the candle. He had in mind an alternative light source. So you need to be thinking that: You need to provide an alternative government, not just a souped-up version of the old government.”

Ted Gaebler

Entrepreneurial government is not afraid to take risks.

The public nature of government means mistakes can wind up as Page 1 embarrassments. But that must not deter the drive to innovate, to create a work culture where new ideas are valued.

“America, in the private sector, can fail its way to success. Didn’t we live through the Edsel to get to the Mustang? Didn’t we live through the debacle of New Coke? The private sector learns from mistakes and goes on. But somehow in government, we think our mistakes are fatal. We need to get that out of our head so we can get to the new ideas and fresh discoveries that will lead us past the status quo.”

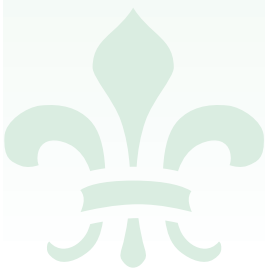
Ted Gaebler

HOW WOULD IT BE ORGANIZED?

Reinvention can take many forms, reflect different approaches, rely upon a variety of tools. What matters is leadership.

It starts with a mission and a vision.

Charlotte, for example, shapes its planning and operations around its mission and vision statements. City government has also established five key focus areas as top priorities: community safety, transportation, development, restructuring government and sup-



porting neighborhoods. City Council committees and specialized cabinet departments that cut across the traditional cabinets are organized around those focus areas, with an assistant city manager responsible for overseeing work in each area.

It builds a community with shared values.

Employees can help articulate the values or principles that will shape their work together — such characteristics as teamwork, for example, appreciating diversity, taking responsibility, respecting new ideas. Once established, it is critical to communicate and reinforce those values: Print them on paycheck stubs. Discuss them in employee e-mails. Robert O’Neill once gave \$50 gift certificates to workers who could recite them when stopped in a hallway. One value of values: They provide a common language. You believe in taking initiative? Then you need to let the employee try her new idea. You want to encourage accountability? Maybe front-line citizen service workers should be authorized to settle modest claims on the spot without three supervisors signing off.

“You keep a strong, talented employee base by engaging them to see that working for city government is not just a job: They are part of achieving the mission and values of that organization. They are part of building their community.”

Pam Syfert

It defines its goals in terms of outcomes.

That is, it focuses on community needs and translates them into goals for government. To take a Charlotte example, the city’s focus on community safety is framed in terms of citizens feeling increasingly secure. In working with neighborhood groups, city leaders learned that reducing crime was just part of the picture. “Small things also made people feel unsafe,” such as graffiti and overgrown vacant lots. At the same time, Charlotte targets larger community challenges influencing crime, such as jobs, education and housing.

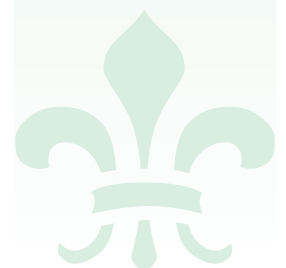
It assesses its work by asking: “Are we making a difference in the community?”

Traditionally, government has viewed its work in terms of “outputs:” dollars spent, calls received, arrests made. The alternative: to carefully choose outcomes explicitly focused on goals set for the organization in the context of community goals. And then carefully select measures designed to track progress toward achieving those goals and outcomes.

For example, to measure improvements in its city neighborhoods, Charlotte has developed a “Quality of Life Index” in cooperation with the University of North Carolina that looks at a dozen indicators ranging from unemployment to the condition of streets and sidewalks. Revised every two years, it is used by government and shared with citizens. It functions as a kind of public report card on the state of the city — and a way to monitor progress over time.

“Cross-functional teams” are where its work gets done.

Call them ad hoc committees. Call them task forces. They call them “Focus Area Cabinets” in Charlotte, where city department heads join forces to plan strategies working across traditional department, and even institutional, boundaries to work on cross-cutting issues and problem solving.



Because the challenges facing cities and communities are complex and multi-dimensional, some governments have gone so far as to eliminate traditional functional departments to organize in new ways by creating parallel structures — by neighborhood, for example. By any name, in any form, it is these collaborative teams drawn from across functional departments that tackle problems most effectively — not just on a temporary basis, not just for special cases, but in day-in, day-out operations. Building new houses alone won't restore a neighborhood in distress, for example. Creating a vibrant neighborhood requires sustained work in arenas from retail development to public safety to cleanup and building a sense of community.

"Historically we have structured government so engineers worked in rooms with other engineers and finance people worked with finance people. But the real high-performance work of the organization is in multidisciplinary teams."
Robert O'Neill

"If you have people focused on what the goals are, you have less argument about turf and more focus on, 'OK, what is the best way to achieve this goal?'"
Pam Syfert

WHAT ARE THE CRITICAL TOOLS?

The last decade has seen an explosion of interest in new management tools and in richer uses of technology in both government and business. The experiences in other communities — and in the private sector — can help Louisville's new leaders make the most of resources and translate mission into tangible improvement and accomplishment.

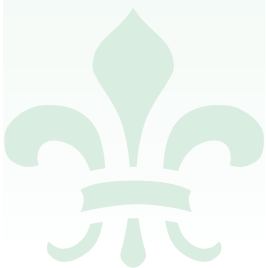
Management structures emphasizing accountability for change.

Well-articulated missions are only as effective as their reflection in the day-to-day work of employees on the front line. Especially in times of change, such as Louisville's city-county merger, it's critical to invest in training and development, said Robert O'Neill: "You ought to spend more, not less, because you're really going to ask people to step up."

Among tools that help build accountability:

✦ **An Employee University** — that is, a workforce training program designed to build a culture around common values, a sense of mission, and a vision for what the government is trying to achieve. In O'Neill's view, managers would attend, then teach it to other workers. That sort of unifying training experience has special relevance for merging governments, said Dennis Hays. After Kansas City's consolidation, some employees felt victims of "a hostile takeover," a perception that still lingers four years later.

✦ **Executive agreements** for managers that reinforce strategic values. One framework suggested by O'Neill sets out three criteria for performance: First, the senior manager must deliver the service — see that garbage is picked up, for example. Second, the manager must do her job in ways that help the city become better at delivering that service down the road — that extra value to the organization of "making sure you are better tomorrow than you are today." If that means taking risks and making mistakes, that's OK in an organization that truly values innovation. Third, to earn the highest performance



rating, a manager would be required to make a contribution to the success of activities in another department or to a broader organizational objective.

✦ **Financial incentives** when goals are met. That could mean pay increases or simple \$300 bonuses for workers when assessment measures show substantial progress.

✦ **An approach called “Venture Teams”** that offers workers, often non-managers, resources — say \$1,000 — to attack a problem: to research who is dealing with it effectively somewhere else and figure out how to replicate it.

“If you could do any one thing that would make a difference, what would it be in your organization? That’s what you want them to focus on. What will make things exponentially better?”

Robert O’Neill

The Balanced Scorecard framework.

First introduced for business, this tool for establishing goals and measuring performance got its public-sector debut in Charlotte after City Manager Pam Syfert read an article in The Harvard Business Review. “I thought, this is exactly what we need.” Its appeal, she said, is the richness of its four perspectives: The customer or citizen perspective. The financial perspective. The internal processes perspective: “Are we developing the structures to help us achieve our goals?” The learning/growth perspective: “Are we helping employees learn and change?”

“For businesses, the financial perspective is at the top. We switched that around and said in our government, in our city, it’s what the customer, the citizen wants from government that’s most important.”

Pam Syfert

Managed competition.

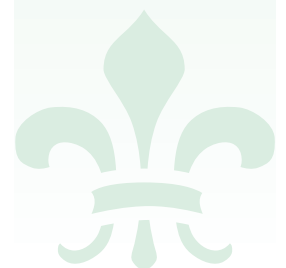
From Indianapolis to Charlotte, cities have put out to bid dozens of traditional government services from garbage collection to building maintenance — letting public departments submit proposals along with private sector businesses. The goal: cost savings and elimination of roles judged less central to government’s mission. Often undertaken in cooperation with employee unions, governments have been able to look for efficiencies without threatening jobs. In some cases public agencies win the contract — and they may also get good ideas from companies they bid against.

“Why is it that in the private sector we worship competition — we know that in America it drives innovation, it raises morale, it increases productivity — but somehow when it comes to government we think we can’t compete?”

Ted Gaebler

Performance-based budgeting.

Just as planning is shaped by a strategy that focuses on outcomes, the budget process can be designed around outcomes. By linking spending and results, such systems help policy makers and citizens determine what activities are cost-effective in reaching their goals and what impact increases and decreases in funding have on programs.



Technology — beyond “repaving the cow path.”

Most governments are only beginning to explore ways technology can reshape operations and relationships. The arenas for change include:

- ✦ **Transparency:** Citizens can read everything from budgets to development plans to public report cards online.
- ✦ **Transactions:** From paying tax bills to applying for permits, more interactions with government can be handled from home or office.
- ✦ **Transformed communications:** Instead of relying solely on the media to get the word out, government connects directly with residents in new ways, via email or cable, for example, announcing the junk pickup schedule, plans for a park or requests for citizen input on a new traffic system.

“Often what we do with technology is make major investments to repave the cow path ... The idea is to ask: ‘Is this a platform that can substantially change the way we do work in order to add value?’”

Robert O’Neill

IMPLEMENTING CHANGE: LESSONS FROM KANSAS CITY AND CHARLOTTE

Managing change is a common theme in the experiences of Kansas City and Charlotte, and each community offers some key lessons.

Kansas City: Making the most of momentum. Getting the word out.

With its four years of post-merger experience, the main message Kansas City’s Dennis Hays has for Louisville-Jefferson Metro leaders is to appreciate the importance of communication.

Public perceptions lagged behind accomplishment as government officials wrestled with practical problems in Wyandotte County, according to Hays. The new government’s employees felt anxiety about change. And some citizen groups, faced with a new government structure, struggled to figure out how to make their voices heard.

“We failed miserably in the area of communication — one with the special-interest groups in the community and two, internally with our employees. Somehow we got lost in the quagmire, the nuts and bolts of doing it and we lost sight of communicating what we were so busy doing.”

Dennis Hays

The creation of a new government also generates a positive energy that it’s critical to harness, said Hays. Wait to make too many decisions and you risk having people “own” the old way and resist change. At the same time, Kansas City has learned change can be achieved only at a certain pace.



“Consolidation is not an event. Consolidation is a journey. In our community we failed to realize that. People said, ‘Did you do it? Is it over?’ Four years later, I can tell you it’s ongoing.”

Dennis Hays

Charlotte: You keep raising the bar.

It’s continuous work on defining, refining and integrating planning and management that makes Charlotte a role model for many communities. Twenty- to 25-year plans for transportation, downtown and land use. Ten-year needs assessments. Five-year capital projects planning. An internal structure that integrates its goals and a variety of management tools right down to individual employee performance plans.

But it took incremental steps over decades to accomplish, said City Manager Pam Syfert. Asked about efficiencies that came from the consolidation of services, she said some, such as a reduced workforce in their police department, unfolded as retirements and job shifts occurred over time: “You don’t achieve them all at once. Our goal is to be fair to the employees.”

And establishing ways to measure government’s effectiveness is a process of continual revision.

“I am a big proponent of finding outcome measures that say, ‘Are we making a difference?’ But you can’t get so wrapped up in the idea that they have to be 100 percent reliable that you will still be having the same conversations 60 years from now ... I’ve come to the conclusion that you figure out what you want to accomplish in your community, what are some ways to do it and come up with measures that are at least halfway valid in helping you figure out if you are doing better or worse and where you can concentrate your efforts.”

Pam Syfert

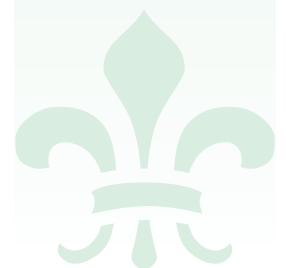
Indeed, that reflects one of the most important lessons from Charlotte: To expect the reinvention of government to be a continual process of experimentation and innovation — a work in progress.

“We just learn and we keep trying. No matter what you’ve done for your community you can always see that there’s a bar out there that can be raised.”

Pam Syfert

“Ask yourself what it is impossible to do — that, if it could be done, would fundamentally change government for the better. And remember, if someone says, ‘That’s impossible,’ it is not a statement about truth, it is about their perceptions.”

Ted Gaebler



A glossary

balanced scorecard: A management instrument that translates an organization's mission and strategy into a comprehensive set of performance measures to provide a framework for strategic measures and management. The scorecard measures organizational performance across four perspectives: financial, customers, internal practices and learning/growth.

core process: The fundamental activities or group of activities so critical to an organization's success that failure to perform them in an exemplary manner will result in deterioration of the organization's mission.

mission: An enduring statement of purpose; the organization's reason for existence. The mission describes what the organization does, who it does it for and how it does it.

outcome measure: An assessment of the results of a program activity as compared to its intended purpose.

output measure: Tabulation, calculation or recording of activity or effort.

performance goal: A target level of an activity expressed as a tangible, measurable objective against which actual achievement can be compared.

performance management: The use of performance measurement information to help set agreed-upon performance goals, allocate and prioritize resources, inform managers to either confirm or change current policy or program directions to meet those goals and report on the success of meeting those goals.

performance measure: A quantitative or qualitative characterization of performance.

performance measurement: A process of assessing progress toward achieving predetermined goals, including information on the efficiency with which resources are transformed into goods and services (outputs), the quality of those outputs (how well they are delivered to clients and the extent to which clients are satisfied) and outcomes (the results of a program activity compared to its intended purpose) and the effectiveness of government operations in terms of their specific contributions to program objectives.

stakeholder: Any person or group that can place a claim on, or influence, the organization's resources or outputs; is affected by those outputs; or has an interest in or expectation of the organization.

strategic goal: A long-range change target that guides an organization's efforts in moving toward a desired future state.

strategic objective: A broad, time-phased measurable accomplishment required to realize the successful completion of a strategic goal.

strategic planning: A continuous and systematic process whereby guiding members of an organization make decisions about its future, develop the necessary procedures and operations to achieve that future and determine how success is to be measured.

vision: An idealized view of a desirable and potentially achievable future state; where or what an organization would like to be in the future.

Source: U.S. National Performance Review



LEGISLATIVE LEADERSHIP: VISION AND VALUES

June 18, 2002

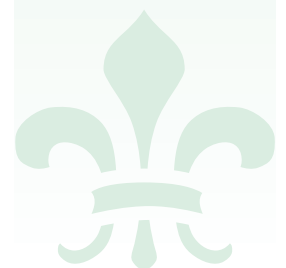
“Local legislators have a tough job. They are directly and most intimately accountable to the people in their neighborhoods who elect them ... yet by themselves, acting as individuals, local legislators have very little direct control over the means to solve anybody’s particular problem ... Nor can they as individuals pursue a grand vision to make Louisville a better community.

It is that dilemma — the pressure for immediate, local, neighborhood-level constituent concerns balanced with the big-picture community needs — that we want to talk about.”

Opening remarks
Carolyn Gatz, Director
The Greater Louisville Project

“If we are to make merger make a difference, if we are to take advantage of this new, once-in-a-lifetime opportunity to create a government that works, we cannot have politics as usual. Today we hope to explore a better way.”

Opening remarks
C. Dennis Riggs, Chairman
The Greater Louisville Project



INTRODUCTION

The juggling act faced by any new local legislator is challenging:

- ✦ Fresh from the election fray, how do you shift gears from politics to policy?
- ✦ After the intense individual quest for votes, how do you commit to the collaboration needed to get things done?
- ✦ How do you work effectively with colleagues you may know only from their campaign advertising?
- ✦ Chosen by residents in your district, how do you balance responsiveness to their neighborhood concerns with the need for big-picture decision-making that tackles major community problems?

For the 26 members of the new Louisville-Jefferson Metro Council, the stakes are even greater: They will help create and lead the new consolidated city-county government approved by Jefferson County voters in 2000. And they will inherit the ambitious aspirations that referendum reflected — to embrace a new agenda for the community and ultimately to make a difference in the quality of life for its citizens.

Working together to create a common vision, strategic plan, and values is the most important step in meeting those challenges: That was the clear message from national experts when they met with an invited group that included all Metro Council candidates as well as local government and civic leaders in June 2002.

This paper describes strategies outlined at that meeting with emphasis given to the Local Government Leadership Model developed at the University of Virginia's Weldon Cooper Center for Public Service. It also seeks to capture the spirit of that workshop — government's real-world quest to live the promise of democratic ideals.

"Democracy is a trust and the officers of government are trustees and both the trust and trustees are created for the benefit of the people."

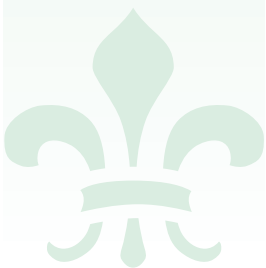
Henry Clay 1829

"Democracy is not a tearing down. It is a building up ... It does not destroy, it fulfills. It is the alpha and omega of man's relation to man ... Its foundation lays hold upon eternity."

Calvin Coolidge 1916

"The experience of democracy is like the experience of life itself — always changing, infinite in its variety, sometimes turbulent and all the more valuable for having been tested by adversity."

Jimmy Carter 1978



THE PANEL FRAMES THE CHALLENGE

The workshop leaders were:

Robert Matson, Director of Leadership Development at the Weldon Cooper Center for Public Service and director of the center's Senior Executive Institute at the University of Virginia. A former president of Ricker College and vice president of Kent State University, Matson has an Ed.D. degree from Indiana University. He helped develop the high performance government model, which emphasizes the need for strong leadership and teamwork throughout organizations — not just at the top — to achieve goals. Working for more than 15 years with local government and councils, Matson said he seldom encounters communities facing a transformation as dramatic as Louisville's.

"You've leapt off the cliff and are saying, 'We're going to develop this on the way down.' You must be lying awake thinking how to take advantage of this opportunity."

A. Tyler St. Clair, a faculty member at the Weldon Cooper Center. A graduate of James Madison University, she worked for eight years in Lynchburg, Va., city government as an internal organizational development consultant. At the Cooper Center, her chief focus is on implementing a governance model to help city councils provide collective visionary leadership.

"Democracy is a very powerful thing ... We want to tap into the core values that caused you to step up and run, to say, 'This could be a better place.'"

Robert J. O'Neill, President of the National Academy of Public Administration (NAPA) and organizer of the session. A former executive of Fairfax County, Va., and city manager in Hampton, Va., he has a record of innovation in performance-based management. An independent, nonpartisan organization chartered by Congress, NAPA aims to assist federal, state and local governments improve effectiveness, efficiency and accountability. NAPA views Louisville's merger with intense interest, he said, because it is the first city of its size to vote to consolidate local government in a generation.

"This is a significant, perhaps a seminal, event for local governments in the United States right now. If you are successful, you will become a model for communities all over the country to come visit and see in the 21st century how you operate for the greater good."

LEGISLATIVE LEADERSHIP: ONE MAJOR BALANCING ACT

"Everything about the nature of running and getting elected to a local legislative body will push you to concentrate your time, your attention and your energy on serving your immediate constituent needs at the grassroots level — and that's as it should be."

"That's why local legislative bodies are elected by district. And yet you're all running because you, like us, want to make merger make a difference."

*C. Dennis Riggs, Chairman
The Greater Louisville Project*



It is easy to imagine the differences that could divide the 26 new members of Louisville-Jefferson Metro Council: Politics, race, gender, age, education, work experience. There will be government veterans and newcomers. City dwellers, suburbanites, fiscal conservatives, champions for society's have-nots, managed-growth proponents, laissez-faire advocates. The list could go on and on.

It is harder to see how they will come together, as they must, to face the urgent agenda that confronts them.

That is the challenge that collaborative leadership models seek to meet: To appreciate the diversity at the heart of the democratic ideal and then build upon underlying common values — a deep concern for the quality of life in the community. To recognize responsibilities elected officials have to district voters — but to create a structure to help them address larger, more complex issues and strategic goals for the whole community.

The University of Virginia model, based on an adaptation of the Carver Model of Policy Governance (page 21) offers a template for moving beyond politics to focus on policy.

Those models recognize challenges inherent in the job and offer strategies to help decision makers focus on issues of compelling importance, develop written statements of goals and values, and create a framework for working together.

“There is a very distinct difference in the skills and the roles between getting elected and governing ... How do you represent the constituency in your districts, which there will be an enormous pressure to do ... But at the same time how do you make the sum of the parts greater than the individual parts themselves?... When do you collaborate? When do you fight? What are the rules of engagement?”

“All of these are things you are going to have to master on the fly. This is the equivalent of changing the tires on the truck while moving 60 miles an hour.”
Robert J. O’Neill

Switching from politics to policy is just one of the challenges that makes local government different from other leadership jobs. Among others:

✿ Citizens, in an era of flashy marketing and consumerism, may view elections as a business transaction.

“They want a quick return on their investment. How do you show you have a plan and may need to slow things down a bit?”
Robert Matson

✿ Decision-making occurs in a fast-paced environment and in public view. Complex factors — including deeply felt political values — shape debate.

“It’s a world of no right answers. There’s a lot of conflict and compromise.”
A. Tyler St. Clair

✿ It can be hard to get meaningful feedback on your accomplishments and effectiveness.

“How do you know if you are doing a good job? You may have to wait until the next election.”

Robert Matson



SPECIAL CHALLENGES FOR METRO COUNCIL MEMBERS

Members of Louisville-Jefferson Metro Council will face a unique universe of additional challenges as new members of a new body in a new government. Among those listed by the candidates and other workshop participants:

- ♣ Reassuring citizens and employees, as one participant put it, that services will be provided from Day 1 and continue ... We need to hit the ground running.
- ♣ Helping government organize itself, as one council candidate described it: a very untypical and hugely demanding and time-consuming task.
- ♣ Considering in a methodical-and-prioritized way the hundreds of ordinances previously enacted by Louisville and Jefferson County governments.
- ♣ Managing the pace and intensity of the workload — a participant suggested a schedule of debate so you're not dealing with 15 controversial issues at once.
- ♣ Facing unusually high public expectations. We're going to have a number of constituents in every district who're going to say, "You said you would do this. Do it by Friday."
- ♣ Coping with uncertain budget conditions.
- ♣ Confronting issues in providing services to areas with different histories and expectations: the City of Louisville, dozens of small cities and large unincorporated areas.
- ♣ Facing uncharted internal council alliances — from the political to the geographic — and defining the council's relationship with the new Metro Mayor.

One Model: Vision and Values help operate at a higher level

"In the legend of King Arthur of Camelot, Arthur was successful in removing the sword from the stone where all others had failed because he knew the heart of the people and was committed to a vision which met their needs ... That fable contains powerful parallels for local elected leadership today ... Today's world requires a collectively committed elected body to bring forth the magic of democracy."

*Weldon Cooper Center for Public Service
University of Virginia*

In the day-to-day crush of demands, it would be natural for a time-pressed elected representative to succumb to the lure of the in-basket school of time management — simply coping with the endless flow of immediate problems.

But that would be a fatal mistake, said Robert Matson:

"If you wind up at the end of the year and have solved all the problems that come across your desk, what have you really done? Not much in terms of leadership."



The center's Local Elected Leadership Model sets out a strategy aimed at creating a vision for the community and guidelines for collaborative decision making. Its goal: to help focus on policy and the substantive, complex underlying issues that challenge communities in these rapidly changing times.

Its payoffs include increasing the effectiveness and efficiency of council operations: Time invested early in establishing a clear vision for the community and structure for council member roles provides a context for setting priorities and a basis for evaluating issues.

The process, usually initiated through a series of retreats and guided by experienced facilitators over several months, has five steps.

1. Forming strong working relationships. Council members who know one another's strengths, philosophies and personal histories have a greater potential for overcoming differences to collaborate on solving problems. They are also more able to find common ground if they can understand the political values that shape others' perspectives as issues are debated.

Four key political values defined by University of Kansas professor John Nalbandian, are outlined in the Cooper Center model: efficiency or cost-consciousness; concern about individual rights; belief in the importance of social equity, that is, treating all citizens equally; and a commitment to representation, to being sure all shareholders are heard.

"Understanding perspectives can help council members work together. The whole idea is that people may come at an issue from different places."

A. Tyler St. Clair

2. Building a collective picture of the community's future. The council, often working with the mayor, crafts the critical elements of a 10- to 20-year vision — a document that serves both as its goals and as a source of inspiration for government and for the community. Such a vision is both concrete and grounded in values: A strong sense of direction anchored in higher moral purpose, as Matson put it.

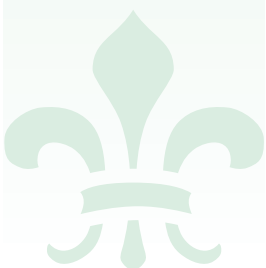
"Let's brainstorm what's right in Louisville and Jefferson County. What's part of the present that must be preserved? How do we preserve the heart of who we are as a community? And then also, what needs to be changed?"

One reason this well-articulated vision is so critical is that, Matson said, democracy is designed to fly apart. With elections, leaders can change. Having the community's most sacred view of its goals in writing provides a road map — subject, of course, to revision.

"Vision is a kind of constancy of purpose, how we check the rightness of our decisions."

Robert Matson

3. Developing principles to drive each project toward the vision. These are values to guide decision-making by both the council and the staff. Louisville might state as a principle that it's critical for its economic well-being to work on developing economic vitality in adjoining counties in southern Indiana and Kentucky. It might make it a principle to consider the intent of old city and county measures as it evaluates procedures. It could put down in black and white its commitment to seeking partnerships with business and other public entities to achieve its goals.



“A good vision by itself is just a dream ... so the question is: ‘How do you, as an elected body, lay out how you want all policies to drive toward that vision?’”

Robert Matson

4. Choosing effective operating guidelines. These are the values that shape how council members work with each other and government staff — their roles, expectations, procedures. “How are we going to make decisions?” is how A. Tyler St. Clair describes it.

Understanding the importance of daily decisions made by government departments, the council might underscore in its guidelines its commitment to working cooperatively with the mayor, who appoints those administrators.

Louisville might choose to have as a guideline that staff will always bring alternative recommendations to the council, not just one option.

One operating guideline example used in Lynchburg, VA: The council formulates policy by determining the broadest policies before progressing to more narrow or specific application decisions.

“You are stepping up to a clean slate. Your work culture will evolve and will be there for those who come after you. You want to craft a work culture that will be worth inheriting.”

Robert Matson

5. Engaging others. It’s valuable to involve the community in shaping and enacting the shared vision. It enriches the process to harness the talents, diversity of opinion, values and energy in the citizenry and it also helps the dream move forward. Poor voter turnout and citizen apathy are not grounds for discouragement about involvement in what Matson calls proactive, pre-problem creation of a vision.

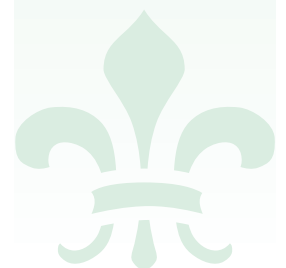
“If you get them involved in the framing of your vision, you have some real feeling of togetherness around what we want this community to be ... You have an opportunity for bringing people on board, for moving into a new phase of democracy.”

Robert Matson

NEXT STEPS/FINAL THOUGHTS

The Local Elected Leadership model outlines a process: It generally takes a few months after an election for legislators to be ready to engage in the challenges of governing. It begins with a retreat, which launches the process. Building working relationships generally precedes substantive visioning. And the focus is not on immediate issues — but on the longer-term. Over four to six months, written documents begin to reflect their collective thinking as Council members and government officials develop a long-term vision and strategy for one community.

The project of embarking on a formal, guided process of organizational development will be up to the council during its first months in office, Greater Louisville Project Director Carolyn Gatz said. The day’s workshop underscored the challenge that lies ahead for the new Council. And it offered a provocative framework for thinking about the highest calling of the legislators’ role.



“The point is that there’s a reason for the new council to engage in developing itself so that it can function at a higher level — the greater coherence and commitment that would emerge from a process like this would lead to the collective vision this community really needs.”

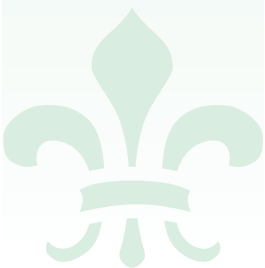
Carolyn Gatz

“You are going to establish the legacy of what this council is going to leave behind: We are going to leave you to wrestle with that.”

Robert Matson

“Democratic institutions are never done. They are, like living tissue, always a-making.”

Woodrow Wilson 1889



LEADERSHIP LESSONS FROM THE CARVER MODEL

For boards and commissions, the policy governance model developed by John Carver and Miriam Mayhem Carver is often viewed as a breakthrough — bringing thoughtful leadership to a new level. Its spirit is embodied in many facets of the Local Elected Leadership Model presented at the best-practices workshop by faculty from the University of Virginia.

The language elaborating on some of its core principles is resonant and potentially inspiring for governmental legislative bodies such as the Metro Council. Three examples:

♣ Board decisions should be predominately policy decisions. And boards should formulate policy by determining the broadest values before progressing to more narrow ones.

“Board policies should be the expression of the board’s soul ... From the stage of musing to the stage of black-on-white documents, in the practice of policy governance, these policies are the product of the board itself ... If the board’s wisdom is not reflected in these policies, a central feature of real board leadership has been missed.”

♣ A board should define and delegate rather than react and ratify.

“Boards are accustomed to approving plans brought to them by staff. But there are predictable problems caused by this traditional practice. The very act of approving forces boards to become entangled in trivia ... The obstruction this constitutes for staff creativity and agility is a severe disadvantage to the organization.”

♣ Determining the end goal is the pivotal duty of governance.

“The justification for any organization lies in what difference it can make ... Focusing on ends ensures that the board tackles the difficult questions ... of what good is to be done for whom and at what cost.”

*From the **Carver Guide: Basic Principles of Policy Governance**, John Carver and Miriam Mayhem Carver, Jossey-Bass Publishers, San Francisco, CA.*

POLITICAL VALUES

In the political arena, decision making revolves not just around technical recommendations or financial bottom lines but around political values. Many community issues tap into a mix of such values — and understanding them can help council members work together and with their constituents.

Representation: This is the deep-seated belief that government responds to the will of the people through elected representatives. The wishes of citizens should be represented in governing bodies. If a public policy is going to have impact on a group of citizens, that group should have the opportunity to be heard.



Efficiency: Citizens expect government to be run with concern for resource management. This is achieved through cost-consciousness and rational, analytical decision making and through an emphasis on expertise and professionalism.

Individual rights: Citizens are granted legal rights that protect them from arbitrary decision making by government. These rights may be expressed in the Constitution and in state and local laws and regulations.

Social equity: Frequently, citizens are treated as members of groups rather than as individuals. As group members, they expect treatment equal to members of other groups. For example, people living in one neighborhood expect to receive a level of government service similar in quality to that received in other neighborhoods.

*John Nalbandian
University of Kansas*



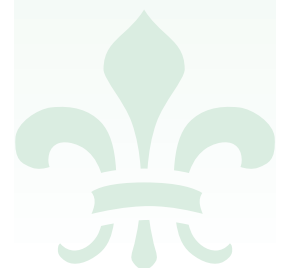
NEIGHBORHOODS: MISSION CONTROL AND BUILDING BLOCKS FOR RESPONSIVE GOVERNMENT

August 28, 2002

“Strong neighborhoods, living your life around neighborhoods, organizing a city around neighborhoods, is not a program ... It’s a way of thinking and doing business and the way you are as a city.

Stop any of our officials and they will tell you we are a city of neighborhoods and we are about the quality of life in those neighborhoods. It doesn’t mean that we don’t love big-ticket projects, that we don’t love office buildings, that we don’t love the San Jose Sharks. But we love our neighborhoods more. We love them first. And we love them all.”

Del Borgsdorf, City Manager
San Jose, California



INTRODUCTION

If a neighborhood has a crime problem, chances are it's not just a police issue. It may involve boarded-up or abandoned buildings, vacant lots, families who are struggling, teenagers with nothing to do. So how does a local government effectively tackle that complex mix of challenges?

Or consider a different dilemma — a city that has many older neighborhoods with deteriorating housing. For years, it has spread around its limited housing-rehab budget, rescuing a home here, a home there. But officials begin to wonder: Could a different strategy have more impact?

Year after year, it's the "squeaky wheels" — community activists who speak out forcefully and have political savvy — who always seem to win city funding for their projects. Is that fair to neighborhoods that aren't so well organized? Is there a way to level the playing field?

These kinds of challenges are encouraging cities across the U.S. to rethink the traditional relationship between government and neighborhoods. They are embracing strategies that link City Hall and citizens in a closer partnership.

- ✦ "Cross-functional" neighborhood teams — groups of government employees with roots in traditional departments like police, fire and public works — may become the base unit for delivering city services and tackling complex problems in geographic areas in the community.

- ✦ Local governments are organizing neighborhood associations in all parts of their communities and providing leadership training. The goal is to engage residents and give *all* residents a vehicle and voice to work with government, setting priorities and solving problems.

- ✦ Citizen satisfaction — government service as viewed from the perspective of the citizen's front porch or the end of the driveway — is increasingly viewed as the test of whether government is doing its job. Start with that outcome as the bottom line and changes ripple through an organization, reshaping everything from budgets to job descriptions.

Those kinds of neighborhood-based initiatives were described by three long-time government managers when they met with an invited group of more than 50 Louisville community and neighborhood leaders, officials, citizens and Metro Council candidates at a "best-practices" workshop in August, 2002. In presentations and question-and-answer sessions, the three described their experiences with a variety of initiatives and approaches in a half-dozen cities from Richmond, Virginia, to San Jose, California.

If they had one lesson to offer Louisville leaders, it was this: Neighborhood initiatives can be the catalyst to do more than simply combine city and county departments in one new bureaucracy. Neighborhoods lie at the heart of a city's mission. And they can be the key to an "incremental revolution" that will reshape and ultimately create a more effective, efficient and responsive government.



THE PANEL FRAMES THE CHALLENGE

The speakers were:

Connie Bawcum, who spent 10 years as Deputy City Manager in Richmond, Va. Richmond's initiatives included nine district teams that plan and set priorities with the help of neighborhood associations and nonprofit, business, civic and tenant groups. "Neighborhoods in Bloom" is the city's strategic housing revitalization program. Community Assisted Public Safety is a multi-departmental effort to target problem properties.

"It's the neighborhoods. It's the neighborhoods regardless of the city you are in. And it's the neighborhoods regardless of the political structure that governs your city. It's the neighborhoods that create a foundation. If you have strong neighborhoods, you're likely to be stronger as a city, as a community."

Del Borgsdorf, City Manager for San Jose, CA., where, he says, neighborhood service is the city "mantra." A 30-year veteran of public management, he served as Assistant City Manager of Charlotte, N.C., where he helped create its "City Within a City" program. That program originally targeted 72 neighborhoods in the core city, using a set of quality-of-life indicators to focus efforts on improvement and chart progress. San Jose's Strong Neighborhoods Initiative includes neighborhood plans, teams and goals defined in terms of outcomes for residents.

"No matter how you come at local government, it's incremental revolution that counts. It takes a long time for local governments to change their stripes, their cultures, their way of doing business."

Valerie A. Lemmie, City Manager since April for the city of Cincinnati. She served earlier as City Manager in Dayton, Ohio, where neighborhood-based planning takes several forms, including leadership training for community groups and elected neighborhood priority boards, established in 1969, which provide institutionalized citizen participation.

"If you want something different, you have to structure it, organize it, account for it and measure it differently ... Everyone says they want to change the system but usually that means they want everyone else to change."

ORGANIZING AROUND NEIGHBORHOODS: A NEW FRAMEWORK FOR LEADERSHIP

"It has to be mission driven if it's going to be neighborhood focused. And you have to mean it. Cities have forever counted stuff. We can tell you, for example, that Parks and Recreation served 694,00 people last year. Then we did ratios and said, 'We served them at a cost of \$6.12 per class ... we're more efficient than anyone.'

"What we don't do is, 'Who cares? What difference did it make?' If I'm standing in my driveway and there's garbage on the street after the crew goes by, the service sucks. It doesn't matter if it's \$2.11 a mile if it looks ugly. We don't measure ugly and customer satisfaction."

Del Borgsdorf



Change doesn't come overnight to governments that have long organized around functional silos and measured work by its processes: arrests made, road-miles paved, tons of garbage collected. Change takes root step-by-step.

Cities with experience in neighborhood-based initiatives have learned that they represent a starting point for change that reverberates throughout government — starting with how it defines its mission, reshaping how it approaches its work, changing its relationship with residents, revamping job descriptions and, perhaps most important, redefining the way it evaluates its performance.

It is a process, even when given a hearty jump start with strong leadership and training, that is likely to take time. Programs in other cities offer vivid examples of how those steps come together.

***“Cross functional teams”*: Where the work gets done**

“In the traditional structures of government — the Department of Solid Waste, the Department of Public Works, the Division of Police — each assumes a specific function in the range of services that a neighborhood needs ... But as the world has grown increasingly complex, neighborhood problems cross departmental lines. So, the theory is, the work should also cross departmental lines.”

Carolyn Gatz, Director, The Greater Louisville Project

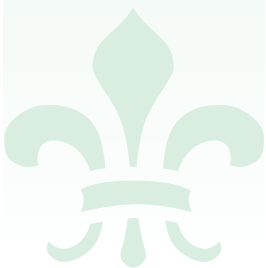
No single blueprint exists as a guide for creating effective teams. Think of junior high school as one model, suggested Robert J. O'Neill, president of the National Academy of Public Administration, when he introduced the idea of cross-functional teams at the first Greater Louisville Project workshop on government organization in April, 2002. City workers keep “homerom” — a traditional department — as a home base. But they spend their problem-solving time with a team of representatives from other departments serving their assigned geographic territory.

Such teams offer distinct advantages.

Teams keep the focus on community needs, not departmental turf. It's the governmental equivalent of Marshall McLuhan's “The medium is the message.” The structure of government institutionalizes your priorities: delivery of services to citizens in a defined geographic area – all services.

“They do not care how we are organized,” said Del Borgsdorf. “They only care that we deliver.”

Teams solve problems more efficiently. Around a table, teams can brainstorm and resolve complex questions on the spot. Out in the community, they encourage every worker, as a team member, to expedite problem-solving. One example: A city worker finds an empty house surrounded by tall weeds and an abandoned car across the street from where he goes on a routine housing inspection. A neighbor tells him the resident is in the hospital. The inspector dispatches the social worker to visit her to get forms signed, calls to get the yard cut and arranges to have the car taken to a city lot for storage. Those steps shore up the neighborhood and represent exemplary public service.



Teams build on community strength. By serving neighborhoods, they start from a position that acknowledges the integrity and assets of the community as it exists for its residents.

Teams are ‘smarter.’ Not all neighborhoods have the same problems. Dedicated teams allow staff to get to know the particular strengths and challenges of each neighborhood and tackle its unique mix of needs more effectively.

Teams motivate. You meet your “customers” at neighborhood meetings. You see the problems in the communities first hand — not just on paper or via phone calls from a desk in City Hall.

Teams keep the focus on ‘the foot of the driveway’ or from the front porch. A community needs a streetlight? In a traditional structure, it is possible to view the processing of a requisition for a streetlight as mission accomplished. Not if the outcome is the bottom line. From the neighborhood perspective, only one question counts: Is the light on?

Neighborhood Assessment: Cornerstone of Planning

The richness of city life may come from the tapestry of neighborhoods that make up its fabric. But how does local government tailor services to places with such different stripes and patterns?

Neighborhood assessment is critical. The need for community-wide neighborhood planning, a recommendation in the Brookings Institution’s study of Louisville, “[Beyond Merger](#),” was underscored by workshop speakers.

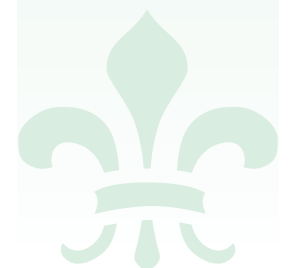
Neighborhood plans serve as statistical portraits. They define demographics, land use, economic characteristics and other factors over time — information that is useful for government, neighborhood leaders, and private-sector interests, from lending institutions to land developers. They define neighborhood strengths and challenges.

Plans build government-neighborhood partnerships. The creation of a neighborhood plan is often a joint effort. That process can harness the knowledge of neighborhood residents and reflect their concerns — as well as the technical skills and experience of government planners and community development staff.

Plans get citizens and government ‘on the same page.’ An assessment — data-rich and detailed, illuminating both assets and challenges — provides a common basis for working together.

Neighborhood plans help government plan strategically. By looking at all neighborhoods, cities can find patterns, focus their energies and develop neighborhood-based strategies. The Brookings report on Louisville highlights Kansas City’s system of identifying neighborhood “typologies” — categories that broadly describe their condition. That city’s classifications — developing, conservation, stabilization and redeveloping — help the community set priorities and goals and invest strategically.

Plans provide a baseline to assess progress. They can help answer the question of whether city initiatives are having an impact. Has that housing program brought more young residents to that neighborhood? Are students missing less school, thanks to new health facilities? Have new businesses been drawn to crucial commercial strips?



Neighborhood empowerment: A richer partnership

"Traditionally those who knew government best got things done and they guarded that knowledge jealously ... You make it fair so everyone knows the rules of the game and everyone gets to compete."

Valerie Lemmie

"The way to make sure everyone has a voice is to help every neighborhood get organized."

Connie Bawcum

At the heart of many neighborhood-based initiatives is a notion that may seem radical: Organized neighborhoods with strong leadership make better partners for government. With their knowledge and dedication to their community, neighborhood leaders provided with leadership training can be allies, colleagues, fellow problem-solvers and a strong reality check on whether government is really delivering.

For that reason, many cities are investing in community organizing in neighborhoods and building leadership by providing training for residents.

Community-wide neighborhood organizing 'levels the playing field.' It puts on more equal footing the diverse neighborhoods throughout a community — from those with well-established neighborhood associations to those that have no tradition of coming together to address common concerns.

It builds community strength. Finding cohesiveness is healthy for neighborhoods and residents. As neighborhoods find their voice, it inevitably opens government to new perspectives.

Over time, trust and collaboration can translate to a truer democracy. Neighborhood leaders who are partners can help set priorities. They may more easily see "big picture" issues beyond their boundaries. And they also have the knowledge and savvy to hold government more accountable. It 'de-mystifies' government. Whether they open "neighborhood academies" on weekends or sponsor for-credit courses through local colleges, more and more governments offer leadership training for neighborhood leaders.

"It is a lot different when residents come to the city council with a completed neighborhood plan that they helped develop and own than when they come to complain about a problem. They sing! They say things like 'I have never felt so proud to be a part of this city. I feel like you are on my side.' It changes the chemistry of the relationship. You are not responsible for it all."

Del Borgsdorf

"Citizen engagement creates improved government performance because it provides a higher level of accountability ... Bureaucrats can hide from citizens who don't know how government works ... None of us wants to spend our days with citizens in our face complaining about what isn't getting done."

Valerie Lemmie

"Over 14 years, a positive relationship of trust built up gradually. The city would say, 'There's a problem. How can we work together to solve this?'"

Connie Bawcum



Putting it all together: How it works in the community

“The first principle of neighborhood responsiveness is that all neighborhoods are not the same. One size doesn’t fit all. Some are more deteriorated. They have different needs. They have different strengths. And once you’ve started prioritizing neighborhoods, you’ve lit the fuse.”

Del Borgsdorf

How does government focus on community needs and customer service yet deal with the realities of limited resources and competing pressures?

The workshop speakers offered a number of case studies — examples from their experiences in both day-in, day-out decision making and establishing sometimes-controversial strategic programs. Among them were these stories.

The neighborhood laundry list: Data speaks louder than words

If neighborhood residents are strong advocates for their community’s needs, they are likely to have a long list of potential projects for a city’s to-do list. But in a culture where a real partnership is encouraged and planning has occurred, there can be a different kind of give-and-take over priorities, said Del Borgsdorf.

“You can say to a neighborhood, ‘You can have 100 things you want us to do but we are only going to listen to the top 10 and we are probably only going to do the top 3 ... and not all of those if the first one has a huge price tag.’ So neighborhood leaders pare back the list.”

But at the top is a teen center. Next comes a road repaving. Now the problem is: City officials don’t agree with those priorities. This neighborhood has an aging population — that’s clear from the neighborhood assessment’s demographic data. As for the street paving — a detailed city survey of all road surfaces shows it is not in bad shape compared to many others.

“Political compromise is part of it. But we do a lot of neighborhood-based data collection so you cannot simply come in and argue. You change a lot of minds when you can say the neighborhood resident’s median age is 52 and by any objective analysis of traffic and pavement conditions, that street comes in 104th.” The bottom line, said Borgsdorf: Good data makes good neighbors.

Making strategic choices: Profiles in courage

A few years ago, city officials in Richmond, VA, decided they needed to make a drastic change in how they were spending housing and neighborhood revitalization funds. Spread over 20 neighborhoods, Connie Bawcum said, the real impact was negligible. “We were saving a house, helping a family and losing the whole block around them.”

The solution: to triage.

They decided to focus the Neighborhoods in Bloom program on just six neighborhoods — and within those six, to target specific blocks. “When you have neighborhoods with



that kind of need,” she said, “it takes some really gutsy people to say, ‘We can’t serve them all.’”

To choose the six neighborhoods, three groups — city officials, neighborhood leaders and a housing-sector task force — worked independently. They evaluated 49 neighborhoods, using demographic, crime and housing data as well as other indicators. On a more subjective level, they assessed the strength of neighborhood organizations as potential partners.

To their amazement, said Bawcum, when the three groups came together after working separately, all three had the same five neighborhoods on their lists of top priorities. They voted to choose the sixth.

“It was the most incredible public process I’ve ever witnessed ... Someone from a neighborhood that wasn’t chosen actually stood up at a meeting and said, ‘I want my neighborhood to be part of Neighborhoods in Bloom. But I know this process has been so fair, so inclusive, that I accept this list.’”

Since then the program has attracted about \$3 in private investment for each dollar in public funds it has invested. “We are starting to turn the corner in many of the neighborhoods,” said Bawcum.

Count among its priceless successes, neighborhood organizing and governmental courage, said Greater Louisville Project director Carolyn Gatz, who has spent eight years doing community development work:

“The organizational capacity, the neighborhood organizing, that allowed a process like that to occur — it is a huge feat to be at a point where neighborhood residents can come together and set priorities among areas. And the willingness to make investments strategic rather than everyone competing to carve up the pie — that is phenomenal in my experience.”

The Team Approach: All-out war on problem properties

- ✿ A house with a reputation for drug trafficking.
- ✿ A park that gives neighbors shivers after dark.
- ✿ Boarded-up storefronts at a key intersection.

In Richmond, some residents felt the city didn’t have an effective system for dealing with the urban eyesores and troublesome crime spots that can make neighbors feel their area is in decline.

In response, the city started a program called Community Assisted Public Safety (CAPS), which uses cross-functional teamwork to tackle problem properties. Citizens help identify the top 10 problem addresses in each of six city districts. Then city officials get to work.

In a typical case, several city departments may have heard about problems at a particular address, said Connie Bawcum. But they have dealt with them at different times in an uncoordinated way:

“The police would be there today, code enforcement would be there next week, the social worker the week after that. The light bulb finally came on: If everyone went out there right now and addressed everything to the max, then maybe we wouldn’t be going to the same property over and over.”



The strategy — “to throw as many legal remedies at every problem property that we can” — involves police, zoning, health, fire, tax enforcement, fire and building and environmental code enforcement staff.

It’s supported by a half dozen other agencies and includes citizen participation. Government lawyers “are very aggressive about taking folks to court.” It has huge fans in the neighborhoods but the team-oriented problem solving approach has been a stretch, she said.

“It isn’t the culture of the rest of the organization.” So, she said, it remains a work in progress.

Putting it all together: Reshaping life inside City Hall

*“Every employee, given important work to do, exceeds your expectations.”
Del Borgsdorf*

The “incremental revolution” of changing government can translate to “huge shock” for government workers. Their jobs may be transformed.

No more quiet days in that cubicle at City Hall. Now there are daily team meetings, regular night outings to neighborhood events, new guidelines to meet to get a raise. You’re a traffic engineer — but that doesn’t stop people out in the community from complaining to you about broken park swings and garbage-strewn alleys.

So it goes when you are on the front line of change: “If it doesn’t get from a city council table to the front seat of a patrol car,” Borgsdorf said, “it didn’t happen.”

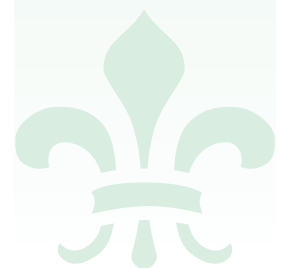
But how does government manage to get its front line mobilized?

Communication is critical. From mission to performance measurement, big-picture issues need explaining. “Weekend warring” with city employees is one strategy for getting people on board and up to speed. In terms of department heads, said Borgsdorf, “the honest term would be insisting on this approach.”

Employee groups are at the table “from Day 1.” Labor unions were plugged into new initiatives in Dayton and San Jose as they were planned. “It’s important to get their input because they know what’s going on,” said Valerie Lemmie, “and because it gets their buy-in ... They don’t want to see all this happening and not be a part of it.”

Training is essential. Aside from any new technical skills, don’t underestimate the challenges in new ways of working with colleagues and citizens, said Valerie Lemmie. “Don’t assume people know how to function in teams — or when to call a meeting, how to listen or how to write an agenda. Older workers may even see teamwork as cheating — they grew up in a culture that emphasized individual effort.”

Job descriptions — and how you evaluate workers — need to change. In San Jose, for example, police officers are expected to spend 35 percent of their time in non-crime-related activities — in “neighborhood-based problem-solving,” said Del Borgsdorf. He also sketched out contrasting profiles for a job-training placement worker.



✿ **Traditional model:** She is at her desk 8-5, handles intake, links applicants with jobs, measures success in numbers placed.

✿ **Alternative version:** She works in a community that has said its No. 1 priority is creating neighborhoods where residents feel safe. John is repeatedly mentioned as a key player in juvenile crime in one area. So this job placement worker visits that neighborhood for several evenings, meets John's grandmother, gets to know her. Eventually she meets John. She finds him a job that gives his life new structure and meaning. Crime problems diminish.

"Worker A placed 246 people. Worker B placed 1," said Borgsdorf. "You've got to decide what the outcome is that you want to accomplish."

Recognize that culture change is gradual. "You can't change the entire organization at one time," said Lemmie. Borgsdorf said, "A lot of the problem is us, the full-time paid career employee ... One reason I am so enamored of neighborhoods as an organizing principle is that there isn't the patience. There is energy."

But make clear that culture change is mandatory. You've provided training, coached workers in terms of vision and values and given them a chance to perform. You've given it time — maybe even years — and they don't buy in? "If I don't want to go there," said Valerie Lemmie, "I can leave."

Lessons for Louisville: Final thoughts

The three speakers offered some parting words for Louisville leaders.

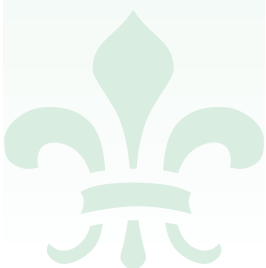
Understand that change is disturbing — and merger alone will inevitably propel city leaders, workers and citizens "outside their comfort zone," said Valerie Lemmie. But the potential payoff for making change in business-as-usual is profound.

"The vacuum, the citizenship gap, the dead-air space between citizens and their government is what you have to face. You have the challenge and the opportunity to close the gap — to have a seamless relationship between your community and its government."

Valerie Lemmie

Where would Connie Bawcum start? "I can't think of a better place to start than to create a public report card — establish four or five of the most important things you want to accomplish. They are very specific. They are very measurable. They are very public. And then say, 'OK, we organize to reduce crime by X percent,' or whatever. Start with the big-picture outcome and let the culture change as you focus on that."

"Create something new," said Del Borgsdorf. "You have an unprecedented opportunity here. Don't simply merge government structures unless they are perfectly effective. Build a new organization ... You will never have all the answers. Setting the direction is the main thing."



Stimulating ideas – and questions – from Louisville participants

“Beyond Merger: A Competitive Vision for the Regional City of Louisville,” the report by the Brookings Institution Center on Urban and Metropolitan Policy released in July, 2002, listed creating strong neighborhoods as one of five key strategies for a competitive cities agenda.

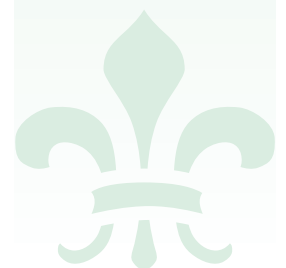
“Quality neighborhoods are a precondition for city competitiveness. These communities of quality must include neighborhoods with vital residential areas and commercial markets ... places that gather families with a mix of incomes ... places with amenities such as parks, libraries and community centers.

“Competitive cities build neighborhoods that are livable and distinctive and offer residents a range of housing, transportation and recreational choices.”
Beyond Merger Report

If workshop speakers “sowed seeds” of new ideas, as one put it, the participants had several chances during the day to mull over which ones should take root.

Here are some of their responses — and some questions they raised.

- ♣ Merger is an opportunity for local government to rethink its mission and structure.
- ♣ Don’t just combine city and county departments. Create something new and better.
- ♣ Cross-functional teams — city workers from different departments organized around neighborhood areas — seem like an effective way to serve residents. But it may be a challenge to get employees to buy in — unions and civil service workers, in particular.
- ♣ Cultivating strong neighborhood organizations will be healthy for the community and an effective tool for creating effective government/citizen partnerships. But how do you create such groups in suburban areas without a tradition of neighborhood organization? Just how do you define “neighborhood?” And how do you help new neighborhood leaders learn the language and process of government so they can effectively connect?
- ♣ It’s important to “expand the table” — that is, to engage involvement beyond the regulars who never miss a public meeting. The prospect of neighborhood groups playing a role in responding to citizen complaints — not just in identifying them — also held appeal.
- ♣ Evaluating government’s effectiveness in terms of customer service — that is, “from the driveway” — makes sense. But doesn’t government also need to look at larger patterns across neighborhood lines — big-picture issues?
- ♣ The new Louisville-Jefferson Metro Council, the legislative body of the new government, will face a parallel challenge to be attentive to district concerns but also to grapple with the community’s larger needs.
- ♣ It makes sense to “triage” community needs and target neighborhood problems. As one participant put it, “One size doesn’t fit all.” Or as another put it, “Equal may not really be fair.”



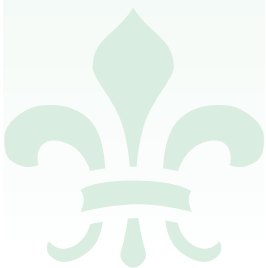
✿ Training for neighborhood leaders is a good idea. “We don’t even have a common language,” said one resident. “The public doesn’t know the language bureaucrats speak.”

✿ Neighborhood-based cross-functional teams should serve territory drawn to overlap the district lines for Metro Council seats. That would encourage cooperation and collaboration and “de-politicize” the process.

✿ The notion of a “citizenship gap” or disconnect between government and the people it serves has special resonance in light of Louisville’s government consolidation. Merger has both raised community expectations and increased fears among some residents that change may mean their voices are not heard.

✿ Changing the culture of government will be a challenge.

✿ The time frame Louisville faces seems daunting: With merger just a few months away, it seems like an overwhelming task to be innovative yet keep basic services stable.



WORKFORCE DEVELOPMENT: EDUCATION, EMPLOYMENT & ECONOMIC VITALITY

October 29, 2002

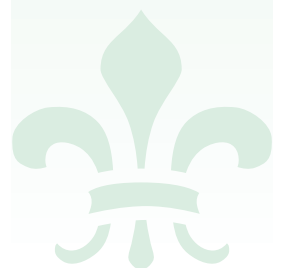
“Louisville has a lot of interesting and exemplary workforce programs. But what we need to think about as we hear ideas today is not to take one idea here and one idea there — but how to knit together a seamless system.

We have to do it all ...

We view this as the threshold or doorway to begin talking about education and the skills of our people and the importance of those skills in our competitive position in an emerging global economy.

This may be the single most important challenge facing our city.”

Carolyn Gatz, Director
The Greater Louisville Project



INTRODUCTION

A crisis may raise the issue: A big employer threatens to leave town if it can't find a more stable, skilled workforce.

Quieter change may gradually erode jobs and optimism in a once-vibrant manufacturing sector.

A researcher may raise the cry: Down the road looms a troubling gap between the needs of local businesses and the size and skills of the working-age population.

Or the message may be delivered through a series of unsuccessful attempts to court the high-paying, "knowledge-based" businesses energizing other regional economies.

All those scenarios — familiar to Louisville and other communities across the U.S. — reflect the forces that make workforce development a critical priority for any city.

The education and workforce development challenge is one of the most crucial issues facing Louisville, said the Brookings Institution's report, "Beyond Merger: A Competitive Vision for the Regional City of Louisville."

Education and employment are part of a complex system that shapes both a region's economic health and prospects for individual prosperity that translate to brighter futures for families and children.

These days it is territory in turmoil — jolted by the decline in manufacturing jobs; the emergence of a global economy; and the growth of knowledge- and technology-driven companies as key players in developing well-paying jobs.

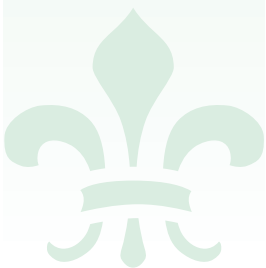
It is already challenging Louisville's educational system, economy, and social fabric, Beyond Merger said.

The regional city's population is aging. It has experienced a "brain drain" – losing a larger portion of its young adults than other cities. Educational attainment is relatively low. Racially and geographically, it is a community increasingly divided into "haves" and "have nots." For now, its jobs remain concentrated in the Regional City of Louisville-Jefferson Metro — but the report said that is beginning to change, heightening the risk of a community marked by suburban sprawl with a "hollowed-out" core at its heart.

Louisville must marshal its resources for change, the report said.

The merger of city and county governments marks a key opportunity to address the workforce development challenge.

At a "best practices" workshop on this topic, four speakers — representing cities from Boston to San Diego — shared ideas about how to do that.



Their common message:

- ✦ Start with a clear mission.
- ✦ Provide leadership — starting with the mayor and the school superintendent and including leaders of all levels of post-secondary educational institutions, government, job-placement and -training entities, community-based organizations and the private sector.
- ✦ Invest in professional staff to serve as catalysts and coordinators. They are critical to keeping that wide-ranging group of players at the table, to guiding programs, to developing funding.
- ✦ Develop data to guide the work – research on labor-market and occupational trends that can shape decisions, assessment tools that can help evaluate whether programs are making a difference.
- ✦ Catalyze and support a wide array of training programs from community colleges to very small community-based organizations. “Think of the system for workforce training as a market, not a system.”

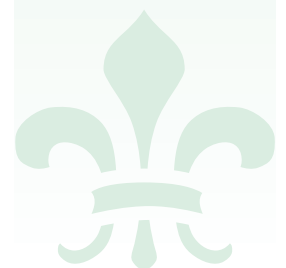
The panel: Four voices, distinct perspectives

The speakers were:

Neil Sullivan, Executive Director of the Boston Private Industry Council (PIC). The PIC serves as Boston’s Workforce Investment Board, with initiatives ranging from one-stop career centers to welfare-to-work programs. At the same time, it works closely with the local public school systems. Its \$30 million budget includes state revenue and money from the private sector. Its top leadership includes the head of the Federal Reserve Bank of Boston, the mayor’s chief of staff, the superintendent of schools, the regional redevelopment authority, college presidents, the local ministerial alliance. Its main focus is lower skilled workers and Sullivan sees workforce development as a critical tool to raise community aspirations.

“As you develop workforce strategies to meet the labor and skill needs of your economy ... I hope your mission and zeal focus on those people left out of the mainstream economy. You could actually put a huge dent in poverty by addressing the isolation that race, class, culture and past practice have allowed to evolve.”

Dr. Karin K. Pettit, President of Corporate College, a venture of Cuyahoga Community College in cooperation with the Greater Cleveland Growth Association, the area’s Chamber of Commerce. A former North Carolina community college president, Pettit shepherds a venture that offers employers a single place to connect with programs at any of the area’s 22 institutions of higher education. Her perspective is shaped by extensive “global benchmarking” — travel and research into progressive workforce development in countries from Singapore to Scotland. “They have their act together. These folks are eating our lunch while we are sitting here thinking should we or shouldn’t we move forward.”



“Consider your community colleges’ roles in economic development. They are flexible, innovative, accessible, entrepreneurial ... It’s important to realize what an asset you have. Are you really taking advantage of it?”

Terri Bergman, Director of research at the San Diego Workforce Partnership. A 15-year veteran of the employment and training field, she has overseen extensive labor-market research in San Diego ranging from highlighting industry “clusters” with strong salaries and potential for growth to analyzing essential job skills in key occupations in target industries. One lesson she has learned:

“The right people are key. You want to be sure the people around the table speak for their industry, speak for their educational institution, have the ability to marshal their folks for the next step.”

Dr. Stephen Mitchell, Director of Workforce Connections in southwestern Pennsylvania. Its work has included analysis of regional industry clusters and collaboration with educational institutions. They have targeted community-based organizations as key resources in identifying pools of entry-level workers and building skills. And they have initiated programs to address the challenge of how employers and the region can retain talented workers — a seldom-addressed aspect of workforce development.

“All our workforce stuff is set up for an industry economy, not a labor-market economy with churn and change that requires individuals to take charge of their careers, be ‘career-literate,’ flexible and responsive — and where employers view talent as an asset ... We’re weak on information. We don’t understand the changing economy.”

The big picture: Framing the challenge

“We know workforce development is the stepsister of economic development. We know that it’s important. But we don’t think we can do a whole heck of a lot about it because it is so complicated. So everyone talks about workforce but no one does anything when they are elected. “It starts with the mayor making a public decision that workforce and education are a top priority.”

Neil Sullivan

The complexity of workforce development is its most formidable challenge, the four speakers said — especially set against the constant churn of change from the shifting economic, political and global landscape.

Key questions for education and workforce training providers:

- ✿ What is your mission, given your community’s needs, commitment and resources?
- ✿ What strategies are most critical for addressing those goals — for creating a system that works?
- ✿ How can you keep your community engaged over the years it takes to build on successes?



Mission and metaphor: The leadership role

A mission statement is an important launching pad. It focuses the work on the big picture. It provides a reference point over time – and that role is particularly valuable in a realm that requires long-term effort by a network of individuals and organizations. Here are how the speakers distilled their roles and their goals.

Neil Sullivan, with the Boston PIC, describes its work as:

*“A **system** — a structured set of relationships, with leadership and resources lined up behind those relationships so they can do something with education, training and access to opportunity.”*

The PIC mission statement: “To connect the young and adults of Boston with careers in the mainstream economy.”

Karin K. Pettit, of Cleveland’s Corporate College, calls it:

*“A comprehensive **employment service system**” where the community college serves as a “**broker**” or “**portal**” into the world of education, training, employment, and finding skilled workers.*

Stephen Mitchell, of Pittsburgh Workforce Connections, says:

*“We are a **workforce architect**. Our job is to look at the human-capital system and say, ‘What are the building blocks we need to create an effective market?’ Then we are supposed to identify the contractors to put those systems into place.”*

*The goal: “To create a world-class **human-capital market** in southwest Pennsylvania ... The region is the product.”*

“The notion of a market was purposely chosen,” he added. “It’s different from talking about a system. A system implies you can get your hands around something and exercise some control.” And workforce development, some would say, “is too messy. If we try to get our hands around it, we are never going to succeed.”

Terri Bergman, of San Diego’s Workforce Partnership, puts it this way:

*San Diego’s “**regional comprehensive plan**” has three goals — to “attract high-value jobs, to link education and training to the local job market, and to limit sprawl.”*



What are key strategies for addressing the workforce challenge?

If the community sets its sights on building a world-class workforce development system, what are key pieces of the picture it needs to consider?

It may not matter who is at the head of the table, just so everyone is around the table. Leadership can come in various forms — from the mayor to the school superintendent to an agency head. What seems to matter most in terms of making progress, the speakers said, is that individuals with real authority work side-by-side in meetings and develop strong working networks across institutions so decisions can be made.

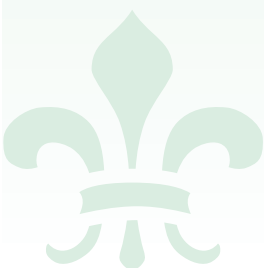
Partnerships are at the heart of the work. Every speaker described programs based in cooperation and collaboration: College programs in which one higher-education institution recruits students for others, acting as an intermediary to meet employer needs. “Industry clusters” working together to attack common concerns. Business-and-school partnerships that range from mentoring to on-the-job training to boost student school achievement. Connections with faith- and community-based organizations because of their close ties and deep roots in the community.

Take stock of what you know. The collection and analysis of data about employment patterns, education and labor trends are key. San Diego, where defense-spending cuts dealt the economy a blow in the 1990s, offers a rich example of how research can guide planning. Terri Bergman started looking at 16 industry clusters, from biotech to horticulture to entertainment. To become a focus of workforce development, she said, a cluster had to be “export-oriented” — that is, it had to bring more money into the region than it sent out — an indication it could be a driver for the economy. San Diego wound up targeting 10 clusters — five in traditional industry areas, five in technology-oriented areas. She has analyzed 85 occupations in those clusters and identified five skills central to each occupation — a step toward increasing understanding of skill strengths and deficits in the workforce. San Diego has produced workforce development plans for eight clusters. Coming up this spring is a series of “industry summits” for five clusters: bio-sciences, communications, computer and electronics, medical services, visitor services.

Work with ‘industry clusters’ — but know their limitations. The identification and analysis of key employment sectors or “industry clusters” was discussed by all four panelists. That can serve several objectives: as a tool for sorting where you are and where you want to go; as a structure for pulling together employers so they focus on common problems. But Bergman and others said most workforce programs — and business communities — seem to be able to target only a few clusters at a time. The willingness of local business to mobilize is often shaped by how urgently they view their problems. “To some extent, it’s got to be an industry in crisis,” said Bergman. “They need help. They want help.” It is also important to remember, she said, that even your largest clusters may represent only a small segment of the region’s economy.

Consider what you don’t know. In the changing job market, some experts, including Mitchell and Bergman, argue that it is important to stay conscious of the ways traditional strategies, research and data fall short. Two examples:

✿ Educational attainment may have once been a key to understanding labor force needs. No more, said Mitchell. “The degree or certification a worker has may have no bearing on whether they can do the job. You need to know more about real skills and competencies needed to perform jobs. And we know next to nothing.”



✦ The cost and effort of hiring to fill vacancies is formidable, but most workforce development programs haven't targeted human-resource management strategies aimed at retaining workers, said Mitchell. As an example, he cited the nursing shortage in the Pittsburgh area: In one sense it isn't a shortage. Many registered nurses live in the area, but they left hospital jobs because of the working environment. The challenge is how hospitals can make nurses' worklives more satisfying to lure them back. "We can train and educate all we want," said Mitchell, "but we haven't paid enough attention to what we can do to keep people in the workplace."

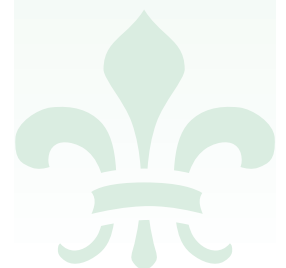
Build strength in key educational institutions. That starts with the kindergarten-to-12th grade system — a point forcefully echoed in the [Beyond Merger](#) study. It reaches up to the Ph.D. level — just a few top-flight scientists can create a nucleus for community bio-tech or research businesses. In between, along with the whole range of post-secondary education, the community college system can play a particularly crucial role if it is flexible, responsive to trends and employer needs, accessible to immigrants and non-traditional students, willing to combine remedial work and specific skill development.

Make your system user-friendly. It should feel "seamless" or "one-stop" to its users. For a citizen, that can mean all jobs are listed in a single database, for example, or that by registering for training at one site, your information is automatically logged into a central registry. "Friendly" can also mean toll-free numbers, a single form used at all offices, access to master job lists through any computer, automatic e-mails about relevant new job openings. For an employer, it can mean a request for training sites or identification of a single contact with a workforce system that does its coordinating behind the scenes. "Companies really want one single contact just as our customers in the one-stops do," said Karin Pettit.

Make sure workers get worklife skills, not just job training. A common concern of employers in today's labor market is "soft skills" — understanding how to dress and act in a work environment; learning how to work effectively with a team of colleagues. Comfort with technology is important. Also helpful are experiences that bridge the gap between classroom learning and job applications, from internships to mentoring and shadowing programs.

Develop financing sources that can support the system. Over and over, the panel members said it's critical to be realistic about the staff needed to provide the connections in the workforce arena: to bring people together, to coordinate programs, to collect data and assess progress. You need "bilingual" intermediaries who speak the language of both education and business. "If you don't staff it with highly skilled professionals," said Neil Sullivan, "it's not going to happen." Financial resources vary by program — from federal dollars to a variety of other sources. Boston's PIC receives substantial funding from the state of Massachusetts, as well as private-sector partners. Pennsylvania's Workforce Connections is supported by eight foundations. The Corporate College is financed by a \$52 million bond issue it will pay off through funds generated by selling its services.

Get workforce issues on the public's agenda. Education, jobs, opportunity and a city's economic health are bedrock issues in the lives of families and a community. So do your work in the public eye, the speakers said, if you want to generate public support. Make it meaningful for the community. Share your successes. Be up-front about conflict. "I specialize in creative controversy," said Neil Sullivan. "We're trying to communicate with people. My infotainment skills have got to be equal to reaching the populace in their busy lives."



Create a community culture that takes seriously the social values linked to access to education and meaningful work. It makes sense from a practical perspective to tap into all segments of the community to bolster labor force needs — from immigrants to people with mental and physical disabilities, to older workers. It may be critical if a city's working-age population is not large enough to meet employers' needs. Helping minorities, the poor and others left out of the mainstream economy, says Neil Sullivan, "just makes a better city, a better Louisville."

"In Boston, there is a general understanding in the employment culture, that we address social and economic issues through private sector participation ... It's not just about demanding the community get better at educating its kids. You get actively involved. That's the quantum leap."

Neil Sullivan

Some final thoughts for Louisville

As the new Regional City of Louisville rolls up its sleeves to tackle workforce development, here are some key notions to keep in mind:

Invest in the system: "This has to be somebody's job," said Terri Bergman. "Somebody has to be evaluated based on their performance. If it's just an add-on, it's not going to happen."

Keep a realistic time frame — and prepare for the challenge of assessing progress: Three to five years is a reasonable time frame to see initiatives come together, said Stephen Mitchell. But as programs begin to work, you will have to develop a variety of ways to assess their effectiveness. "What does accountability look like in a network? How do you measure if partnerships are working well? ... How do you evaluate programs? What outcomes do you look at? Are there things you can quantify? Do you rely on success stories? What about value-added high-end employers? And how about the job market becoming more inclusive?"

Stay flexible and ready to respond to change and new challenges.

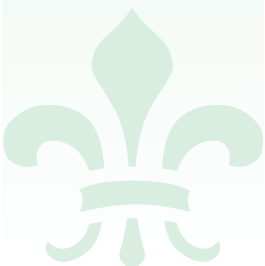
Says Karin Pettit: "That's what the new economy and new demands are all about."

Stimulating ideas — and questions — from Louisville participants

As the four workshop speakers shared their experiences, the Louisville participants had several chances during the day to meet in small groups and highlight the ideas they felt had special relevance for the community.

Most of the 75 local participants had experience in the worlds of education and workforce development — and had some strong reactions and recommendations. Among their comments:

✦ It will be important to establish clear leadership and strong relationships if Louisville is to make substantial progress in workforce development. "We're very hopeful the Metro Mayor can make sure everyone is at the table so they all play a part and are accountable for that part."



✿ “We have random acts of excellence in this community but there is no coordination.” In the workforce realm now, “We don’t have a common vision or agreement about what we are supposed to be doing.”

✿ “Our group has a high degree of frustration. We’ve talked about these problems a long time and haven’t really gotten very far. People are eager to get to it or put it aside and admit we can’t.”

✿ Louisville has a lot of overlap in this realm. “We need a clearly articulated mission or it’s really easy over time and in various organizations to lose focus.”

✿ “Intermediaries” are needed here — people to connect the education/training and employment sectors. “That’s a huge piece that’s missing here.”

✿ Louisville has a need for new funding models.

✿ The idea of global benchmarking is appealing — we need to get good ideas from a wide range of resources and it makes sense to look abroad as well as around the U.S., especially since we compete globally economically.

✿ “We don’t have a clear ‘go-to’ organization for employers to contact.”

✿ A big challenge is how to have those difficult discussions about race, culture, class in a community where achievement and access to opportunity varies widely.

✿ We need a comprehensive marketing strategy in Louisville.

✿ If an employer benefits from a program that cuts turnover of its workers, as companies such as UPS and Norton Healthcare have learned, it saves money on hiring and training. And that could be a revenue source that benefits the workforce development system.



Acknowledgements

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For more information on The Greater Louisville Project, its best practices sessions and transcripts, and the report, [Beyond Merger: A Competitive Vision for the Regional City of Louisville](#), go to:

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