Summary of Regional Leaders Gathering

July 24, 2013

Thank you to everyone who participated in OD Network's Regional Leaders Virtual Gathering on July 24, 2013, hosted by the ODN Regionals Committee. Over 20 engaged participants shared challenges and success stories as well as provided input on newly proposed programs to support collaboration across the regional organizations. The objectives for this gathering were to:

- Create new value for regional network leaders
- Learn from each other
- Build the broadest possible ownership of the group
- Have everyone gain at least one good idea

Our agenda started with introductions, moved to soliciting feedback on two proposed tools for collaborating across regionals, invited participants to share success stories and challenges with one another, and finally wrapped up with feedback on this meeting.   Action items and next meeting information are captured at the end of these notes.

I.   Introductions

Please see the appendix for a list of regional leaders, including designation for those who attended this virtual gathering. The meeting was facilitated by members of the OD Network Regionals Committee: Marisa Sanchez, Jim Leming, Darryl Wahlstrom, Christina Bell, and Maggie Shreve.

II.   Proposed Tools for Regional Collaboration

Based on feedback from OD Network's Regionals Committee outreach effort earlier this year, several initiatives were proposed:

1. Frequent virtual gatherings of regional leaders throughout the year to facilitate connecting with one another to share practices, answer questions, solicit ideas and feedback

2. Regionals Knowledge Base to share information about practices essential in launching and managing a regional organization (e.g., tracking financials, recruiting members, setting up leadership teams / committees, setting up web sites, using social media, etc.)

3. Regionals Program Repository to share innovative ideas for monthly programming, including topics, materials, and speakers

The Knowledge Base and Program Repository are designed to be populated by the regionals themselves to share successful practices with one another and be recognized for sharing practices. Using the tools is optional, but the tools can only be valuable if regionals populate them. Tool disclaimer: The tools are connected to the existing OD Network web site platform. Although the tools should serve our purpose,

this platform is probably not the one ODN would have chosen to support regional collaboration if we were able to purchase other technology – we are doing our best with what we have to offer at this time.

Leaders expressed that these tools, once populated, will save their own regionals time, particularly the idea of helping regionals with programming so leaders can focus on growing membership. Below are a few comments from participants:

Really like the idea of learning from each other

I've been passionate about how to leverage programming in [my regional]. I don't think it has to be cumbersome - just title, speaker, slides. This helps us leverage programs across regionals so we can each focus on strategic growth.

We can't think about how to grow membership because we haven't achieved operational excellence around providing programs – we are spending all of our time focused on programming, keeping us from doing other important things like grow membership.

We are known for positive programs and recognize that membership activity correlates to strength of content in programming.

We created a free blog site for folks and saw our engagement go up.

We have a book we put together with all the procedures we use.   We found that when our programs are weak – our engagement is weak. We have a members-only section on the site for sharing. I'm sure we will be able to upload some good ideas to share with everyone.

Using these tools can help make my regional more effective.

I love the idea of the repository. There is a lot of competition for time of OD folks – there's an organization that provides facilitation practice sharing – so people have choices. I like building community around the leaders – ask a question and get feedback

Leaders also expressed concerns about using these tools. Below are related comments:

I know the challenge it can be to get content onto websites. You need to be proactive in getting content from regionals who have something to share. And also with every group, there is a technology gap. Maybe we could have a short webinar, or a PDF, with arrows and clicks to show us how to use the tool. Also, ODN could incentivize people to send in information.

…while we might have the technology, the most valuable thing is having people to call on. I'm a socio-tech person and worried about the focus being too much on technical vs. social. We all have to make this the kind of personal and professional experience we want it to be.

Running this organization is what we do off our desks - we have very little time to build systems that are sustainable. If we are having trouble doing it for own region, doing it for additional regionals feels like a reach too far.

It would be helpful to have a few basic points about what to include - headlines, exec/summary, a lead, and someone to contact – so that we have uniformity in uploading materials.

We should feel comfortable uploading half-baked ideas or materials – the intent is to share and collaborate with one another, not wait for perfection.

Recognize differences in regionals; it's important to find ways to focus on connecting with other regionals

Regional presidents do not have the time to use these tools; ODN should give complimentary memberships to those in our regionals who will be doing the uploading

III. Roundtable Discussion

Regional leaders proceeded to share challenges and best practices with one another. The Massachusetts Bay OD Learning Group shared challenges that were then echoed by many other leaders present:

The issue we are having in Boston is a competitive market- there are a number of organizations competing for mindshare of our members. A survey of members and subscribers found that members tend to be a little less experienced and seeking mentors and connections, and more experienced, independent consultants belong to a sister organization established by someone who set out to attract that group. It's a challenge attracting people to join the board that have the ability to learn the practical operational skills re technology, writing marketing copy, scheduling and organizing events, creating monthly programs and coaching presenters.

Leaders shared some of their practices that address this challenge:

…programs [in South Florida ODN] have a different quality than SHRM, ASTD events. Those truly interested in OD find those events are more about networking than dialogue. So our events, really engaged in interesting dialogue. How to ensure that is part of our brand.

Two things have worked for us [in St. Louis]. We had to challenge our mind-set for who we let in the door (hard to do since we're so inclusive) – so we've put a lot of thought to how we get the hard core OD folks instead of trainers. Training focus drives OD people away. We average about 60-70 people attending our programs, but many are non-members. We are very clear on who our members are. We have an annual conference – Sept 25th – full day on OD strategy. Lots of dialogue. We have graduate student interns. How do we get people to do more things that are

meaningful in the community? Have graduate student interns with 1 year posts, practicum students – e.g., create good onboarding programs. Two awards for grad students in science.

Philly died on the vine and we are now trying to revive it. We've had some of the issues, like Boston, have a Steering Committee also, but took the approach to follow the energy of the members. Instead of programs, those people who had an issue in their work, such as intergenerational work, that became a day long program with 60 people. Many who attended were not members but we got members out of it.

Christina will ask the DFW technology expert to submit a writeup on WordPress and other practices being a low-tech and low-cost organization recognized as Outstanding Regional org in 2010.

Several leaders reported excellent results using Wild Apricot to design and host their web sites.

We [Denver] try to streamline everything - have no membership, low fees, those job searching or external with no gig attend for free. Because keep at a minimum, our website is LinkedIn, and use Google docs for invitations. Every year have an RFP process to fill our programming schedule, we listen to our members, and they become the faculty to present the topics. We create really interactive programs.

[Minneapolis] organization started 40 years ago, but the board is in transition. Where does the membership want to go - national/international, or local community? We have job descriptions, and by-laws, looking at having an outside administrator for our technologies.

IV.   Connecting

Participants expressed a desire to know more about each regional to facilitate reaching out to one another for assistance. As a follow-up to the call, Julie Rapacki (Minneapolis) drafted a list of information regionals might want to know about each other:

- Organization Name
- Website address
- Contact person and information (name, email, phone)
- Geographic region served
- # of Members
- # of Non-member network (non-renewing members, attendees at programs, social media connections)
- Types of activities (speakers, newsletter, job postings, forums, social media, certification, knowledge sharing, thought leadership, internships, other)
- Type of network (stand alone membership organization, committee meetings, special interest groups, group within larger organization)

- Tax status elected - 503(c)(3); 501(c)(6), other
- Organizing principles (democratic, self organizing, robert's rules, following the energy)
- Membership concentration (internal practioners, external consultants, for profit, non-profit, government, students, academic, scientist, 1-5 year practioners, 5-10 practioners, 10+ years of practice)
- Growth cycle (new, re-forming, stable, declining, facing increased competition, at a cross roads)
- If provide speakers or other programs, average size of attendee
- Method of obtaining member feedback (survey, case-by-case, regular forums, other)
- Affiliations, sponsors or hosts (Corporate, Educational Institution, ASTD, SHRM, Coachs, Facilitators, Psychologists, Other)
- Use of technology (minimal, basic, social media, virtual, leading edge)
- % of annual budget committed to outside vendors and administration.
- Strategic planning (none, informal, formal)
- Succession planning (none, informal, formal)
- Funding (volunteers, self, membership, sponsorships, program attendance, past revenue, other revenue)

V.   Wrap up

Feedback on meeting

- I appreciate the time and effort to run this call
- Invaluable to hear other people's experiences and look forward to connecting with other more
- Virtual connection is preferable as participants have a financial barrier to join or attend face to face meetings
- Our board is going to be happy to get this information
- I value the contact and ability to reach out

Action items

- Regionals committee: discuss request to delegate complimentary membership to non-presidents and present any recommendations for policy changes to ODN Board of Trustees for vote. Current presidents can email odnetwork@odnetwork.org to request complimentary membership to ODN.
- Regionals committee: provide access to regional knowledge base and program repository to those regional presidents holding a current membership or complimentary membership
- Participants: provide comments on Julie Rapacki's draft list of information regionals may want to share about themselves
- Participants: share your ideas for topics for upcoming meetings, including topics you think would best be discussed in person during the upcoming Regionals Caucus October 6th in San Jose, CA
- Participants: if you know someone who might be interested in helping OD Network update its web site to increase usability, please contact Christina Bell (cbell@odnetwork.org)

Next Meeting: The Regionals Caucus will be held at 9:00AM on October 6th in San Jose CA, in concert with the OD Network Annual Conference. To make the most of our time face-to-face, this meeting will

be designed as a very interactive session; remote attendance cannot be accommodated. We hope you will join us for this Caucus and the Annual Conference.

Appendix. Regional Leaders and other Primary Contacts

OD Network keeps Regional Contact Information on its web page http://www.odnetwork.org/?RegionalContacts (menu navigation: Network of Networks / US Regional OD Networks / Regional Contact Information)

Regional Network	President/Chair/ Primary Contact	Email	Attended 7/24 Gathering	Other Leader(s)	
Arizona OD Network (AzODN)		eaharwood@hotmail.com			
Bay Area OD Network	Christine Hunter	office@baodn.org			
Capital City Organization Development Network	Douglas Hartshorn	Holodeh@yahoo.com	Y		
Central & Western NY OD Network		wsapiro@localnet.com			
Central Texas OD Network		sjwells@earthlink.com		Suzanne Young	slyoungnyc.gmail.com
Charleston OD Network		userbill9098@cs.com			
Chesapeake Bay OD Network	Jill Hinson	jhinson@cbodn.org			info@cbodn.org
OD Network of Chicago	Maggie Shreve	Maggie_Shreve@rush.edu	Y		admin@odnchicago.org
Cleveland ODN	Rafaela Reyes	rafaelareyes1@gmail.com	Y		-
Dallas/Ft. Worth OD Network		christina.bell@sbcglobal.net	Y		
Downtown Indy OD Network		Selsey@exacttarget.com			
Great Lakes OD Network		akincaid@otterbein.org			
Greater Cincinnati/Dayton OD		odncincy@aol.com			
Greater Orlando OD (GOOD) Network	Erica Sorrell	president@goodnetwork.us	Y		
Heartland OD Network (HODN)		Gwen.Weakley@kcpl.com	Y		
Houston OD Network	Wayne Dorris	wayne@people-people.net			

Indianapolis OD Network		kimchesky@netscape.net			
Maine OD Network		darcyc@maine.rr.com			
Massachusetts Bay Organization Development Learning Group	Charley Matera	cmatera@mbodlg.org	Y	Clarissa Sawyer	csawyer@mbodlg.org comms@mbodlg.org
Mid Florida Regional OD Network		Eagletraininggrp@aol.com			
Minnesota OD Network		boardchair@mnodn.org	Y		
New Jersey OD Learning Community	Tara Seager	njodgroup@gmail.com			
OD Connection of NE Ohio	Mary Ann Hogan	contact@odconnection.org			
OD Network Long Island	David O. Schwartz	info@odnetworkli.org			
OD Network of New York	Mark Berns	mberns@odnny.org			
OD Network of San Diego	Melissa Steeg	President@sdodn.org			
OD Network of Western New York	Michael Cardus	create.learning@gmail.com	Y		
OD On The Edge	Lynne Ingersoll	lynneingersoll@bellsouth.net	Y		
Omaha OD Network	Jamie L. Kelly	jlkelly@oppd.com president@omahaodn.org		Todd Conkright	pastpresident@omahaodn.org
Oregon OD Network	Jackie Barretta	president@odnoregon.org	Y		
Oregon OD Network	Tammie Walker, PHR	tammiewalker99@gmail.com	Y		
Organization Change Alliance - Atlanta	Carla Gracen	carlagracen@organizationchange.org	Y		
Organization Development Network - Greater Denver Region (ODN-GDR)	Debi Cohen Lake	debra_cohen@hotmail.com	Y	Holly Pendleton	hollypendleton@gmail.com
Organization Development Network for the Miami Valley		mmiller025@woh.rr.com			
Pacific Northwest OD Network	Rachel	info@pnodn.org			

	Dexheimer				
Philadelphia Region OD Network		jeffreybr@pcom.edu	Y	Jim Leming ?	jimleming@aol.com jerry@jasbmanagem ent.com
Sacramento Area Organization Devlopment Network		president@saodn.org			
San Antonio Association for Organizational Development	Pepper Wilson	president@saaod.com			
SFL ODNetwork	Chris Chiterro	info@sflodn.org	Y		
South Bay Organization Development Network	Cherie Del Carlo	cherie@sbodn.com	Y		
Southern Nevada OD Network	Daryl Ann Moore	snodnet@gmail.com			
St. Louis OD Network	Vicki Tardino	vicki_tardino@alumni.um ass.edu	Y		
Triangle OD Network of NC	Lynn Duff, MA, MC	Lynn@Talentbuilders.net	Y		todnadmin@todn-nc.org
Western New England OD Network		mike@create-learning.com			
Zambia	Daniel Lyatumba	lyatumbad@gmail.com			