Introduction

The Central Shenandoah Planning District Commission (CSPDC) adopted its first Strategic Plan in 1999. It was updated in 2007 and then again in 2013 during a strategic needs assessment conducted by the Southeastern Regional Directors Institute (SERDI). The 2019 Strategic Plan includes a thorough review and analysis of the three prior strategic plans and updates the information and sets new goals for the CSPDC.

About the CSPDC

The Central Shenandoah Planning District Commission (CSPDC) was created on September 30, 1969 pursuant to the Virginia Area Development Act (Title 15.1, Chapter 34, Sections 15., 1400, et seq., Code of Virginia as amended). By law, it is considered to be a subdivision of local government. It provides regional and sub-regional planning and technical support services to its members; five cities and five counties, eleven towns and many public agencies within its boundary. Its member localities are the cities of Buena Vista, Harrisonburg, Lexington, Staunton and Waynesboro and the counties of Augusta, Bath, Highland, Rockbridge and Rockingham. The CSPDC works with its member jurisdictions, communities and agencies to provide high quality planning, technical assistance and facilitation of services that address local, regional and state needs in an innovative, timely and cooperative manner. CSPDC provides services to a geographic area of 3,439 square miles with a population of 301,529 making it the Commonwealth’s largest planning district in the area and the 7th largest in population.

Main Products and Services: CSPDC provides planning and technical support services to its members and customers in twelve functional areas as set forth in the Regional Cooperation Act, Sec 15.2-4207, Code of Virginia as amended. The agency’s “product” is service to its members, other jurisdictions and agencies by conducting studies and planning for a multitude of programs including, comprehensive planning, transportation and public transit, solid waste management, water and wastewater utilities, housing, community and economic development, water resource management, outdoor recreation, disaster mitigation and education, and environmental services. Additionally, the agency produces reports, maps and other services as requested by its members and stakeholders.

The services mentioned above are provided to members and stakeholders via the planning and support staff. Planning staff have particular areas of expertise, such as disaster mitigation and pre-disaster education training; demographic and statistical analysis; environmental, transportation, infrastructure and community facilities planning; comprehensive plan updating; strategic planning facilitation; regional issues facilitation and project development; etc. These staff work with representatives from member organizations to perform studies and develop project and program recommendations.
Organizational Environment

Mission, Vision, Values: CSPDC’s organizational culture is one that is focused on providing high quality planning and technical support services to its members and other agencies. Its values reflect the highest standards of professionalism and respect for members, customers and diversity. Being a small organization, decision making is relatively flat. Employees are empowered to make decisions and to act in the best interest of the organization and customers within the constraints of law, regulations and agency procedures. There is a strong commitment to excellence.

Vision: To be recognized and respected as leaders in regional and local planning issues by providing exceptional support to the local governments of the Central Shenandoah Valley Region.

Mission: To help communities and agencies within the Central Shenandoah Valley work together by providing high quality planning, technical assistance and facilitation services that address local, regional and state needs in an innovative, timely and cooperative manner.

Structure and Governance: CSPDC is organized and formed as a subdivision of government, per the standards set forth in the Code of Virginia. It operates with a 21- member Board of Commissioners appointed by the ten member localities. The member localities are the counties of Augusta, Bath, Highland, Rockbridge and Rockingham and the cities of Buena Vista, Harrisonburg, Lexington, Staunton and Waynesboro. The Board is comprised of elected officials, appointed officials and private citizens. The number of Board members per locality is allocated on a percent of population formula with each locality having a minimum of one member. Augusta and Rockingham counties each have four members; Harrisonburg has three members; Staunton, Rockbridge County and Waynesboro each have two members, and Highland and Bath counties and Buena Vista and Lexington each have one member.

Board of Commissioners - 2019

Augusta County
Marshall Pattie, Treasurer
Vickie Moran
Leslie Tate
Butch Wells

Bath County
Edward Hicklin

City of Buena Vista
Billy Fitzgerald

City of Harrisonburg
George Hirschmann
Sal Romero
Adam Fletcher

Highland County
Kevin Wagner, Vice Chair

City of Lexington
Frank Friedman, Chair

City of Staunton
Carolyn Dull
Sharon Angle

Rockbridge County
Jay Lewis
Chris Slaydon

Rockingham County
Rick Chandler
Ned Overton
Rhonda Cooper
Kim Sandum

City of Waynesboro
Terry Short
Rusty Johnson
Board members are appointed for terms of three years. Every June the Board elects new officers and a seven-member Executive Board that serve for a three-year term. The Executive Board provides for the day-to-day governance of the agency while the Board of Commissioners provides for broader policy matters, approves the annual budget, etc. The Board has approved by-laws and policies to govern the agency.

The Board of Commissioners and Executive Board meet on an every-other month schedule in regular meetings and more often as necessary. Executive Board meetings generally precede regular Commission meetings.

The Board of Commissioners appoints the Executive Director. He/she is appointed, based on merit, for an indefinite term and serves at the pleasure of the Board. The Executive Director is the Chief Executive Officer of the agency and is responsible for its day-to-day management, budgeting, advising the Board on matters of policy and implementing Board policy. The Executive Director appoints all employees of the agency.

CSPDC currently employs thirteen (13) full-time employees and two (2) part-time employees. There are three (3) Program Managers and a fiscal officer, i.e. department heads with supervisory responsibilities of the staff. The Program Managers and fiscal officer report directly to the Executive Director. Four (4) employees have more than 10 years of service with the CSPDC and three (3) of those have more than 20 years of service.
Strategic Planning Process

In 2013, the CSPDC engaged the Southeastern Regional Directors Institute (SERDI) to assist in determining key issues that the CSPDC needed to address to ensure its relevancy to the local governments, State and Federal agencies, and partner organizations throughout the region.

The SERDI staff conducted surveys, one-on-one interviews, and focus groups discussions. The findings of the survey, interviews and focus group discussions generally focused on whether the CSPDC can play an important role as the “convener of the region” as the place where the public and if applicable, the private sector leadership come together to focus on the opportunities, challenges, and issues that face the future of the region. The full report is attached.

The 2019 Strategic Plan update included a thorough review of the SERDI Assessment as well as previous strategic plans and updated the information, determined which goals had been met and added additional goals. Based on this review and update the following goals and strategies have been developed for the CSPDC:

Goal #1 - Improve communication and working relationship among Commissioners and CSPDC members

- Conduct an annual “facts and issues” input session in each county or sub-region with all elected officials being invited to attend; with the CSPDC staff and officers chairing and facilitating the meeting.
- Provide a formal orientation for new Board members. The purpose of the orientation is so new members (as well as veteran members) understand the history of the organization, why it was formed, the ownership, the mission, the work program, staff capacity, and its offerings, etc.
- Build and strengthen the working relationships with local government professional staff.
- Host regularly scheduled topic-specific roundtables with local government staff, i.e. planners, economic development staff, public work directors, GIS professionals, etc. and any applicable regional partner professional staff.
- Provide additional structured opportunities for stakeholder engagement.
- Lead engagement meetings with key staff of each local government.
- Continue to hold regular meetings of the region’s Chief Administrative Officers.
- Allocate time at the end of every meeting for local government representatives on the Commission to update other members on a key project being undertaken by their community.
- Examine the feasibility of rotating the Commission meetings throughout the region.
- Examine feasibility and interest of a “Regional Tour” that would allow Commission members the opportunity to see PDC projects.
- Engage Commissioners in projects in their localities or area of expertise via Commission meeting reports, project events, project meetings, etc.
• Prepare summaries of activities for Commission members so they can share these activities with their respective Council and Board members and their staff.

**Goal #2 - Increase awareness of CSPDC services and showcase CSPDC’s accomplishments**

• Develop a communications/outreach/public relations process that includes social media, news announcements and email blasts; as well as outreach presentations to local governments, council civic clubs, etc.
• Survey localities and organizations to identify needs and assess perception of PDC.
• Prepare a monthly newsletter to highlight our work and the work of our member governments and expand the number of recipients who receive the newsletter.
• Develop presentation for funding agencies that demonstrates results of which funding has provided. (video, final report with photos, etc.)
• Prepare news releases for major studies and notable achievements to highlight important accomplishments of the CSPDC.
• Respond to media requests as quickly as possible.
• Provide news releases/public presentations when new data is published or prepared.
• Update and maintain CSPDC website(s) (currently the CSPDC hosts and maintains six websites in total).
• Schedule routine marketing calls to localities and funding sources and organizations.
• Develop Annual Report and distribute widely.
• Document successful projects, i.e. photographs, slides, video, PowerPoint presentations, and news releases.
• Create and distribute PDC agency brochure(s).

**Goal #3 - Strive for improved and more effective project management to ensure that the best service is offered to the region and its localities**

• Engage in an on-going examination of existing programs to determine areas to a) phase out, b) emphasize, and c) modify.
• Maintain and continuously update regional data center on PDC website to include data links for economic indicators and Census data related to our region.
• Publish Facts and Figures and other economic publications.
• Encourage uniformity of data in the region. Act as a resource.
• Create workspace for outside researchers.
• Host and sponsor workshops on topics that are relevant to the region and the localities; i.e. Opportunity Zones, Chesapeake Bay WIP, Solar Ordinance, Broadband, etc.
• Provide grant writing services, grant administration, and grant identification.
• Conduct studies, develop plans, prepare reports and provide project management services that are impactful for the region.
• Stay abreast of state and federal initiatives that benefit the region.
Goal #4 - Create a professional and well-trained staff and conducive work environment.

- Expand staff skills to improve the visibility, clarity, and purpose of our products.
- Encourage staff to pursue training opportunities to ensure they possess the technical skills and knowledge required to produce a quality product and provide professional advice.
- Sufficiently cross-train professional staff and cross-train at least one individual in Accounting and Payroll to provide needed back up.
- Update job descriptions for each staff member to ensure that changes in responsibility are recognized in the job description.
- Develop succession plan for Executive Director and other key staff.
- Hold staff and program managers meetings on regular basis in order to discuss deadlines, staff assignments, scheduling, budgets and project management.
- Explore the feasibility and use of project management software.
- Offer public speaking, meeting facilitation, leadership training, and presentation skills training to staff.
- Provide opportunities for networking and partnerships with localities and other organizations.
- Develop pre- and post- project evaluation checklist including budget analysis.
- Standardize office procedures to ensure increased efficiency and effectiveness.
- Develop and use new-employee orientation program.
- Improve automation of office procedures and record keeping.
- Develop and maintain a technology plan to ensure technology needs are met in a timely manner and replace or up-grade technology as needed.
- Modernize, replace, up-grade office furnishings and maintain modern conference space.
- Equip office with appropriate audio-visual and technology equipment, i.e. Power point, large screen monitor, and video conferencing.

Goal #5 - Prepare for the future and explore new frontiers and partnerships for new service and program and funding.

- Develop strong relationships with our state and federal partners and assist with rollout of new programs.
- Work through VAPDC to supplement and complement the efforts at the state level.
- Pursue grant programs that support the Commission’s mission or directly support a request from a local government or key stakeholders.
- Explore “new frontiers and partnerships” for new services, programs, and funding.
- Seek out strategic private foundation alliances.
Central Shenandoah Planning District Commission
SERDI Voluntary Strategic Assessment
January-February 2013
Complete Record Report

About the Central Shenandoah Planning District Commission

The Central Shenandoah Planning District Commission (CSPDC) was established by the Virginia Legislature on September 30, 1969 as one of the Commonwealth’s 22 Planning District Commission’s (today there are 21). The district serves the 11 towns and counties of Augusta, Bath, Highland, Rockbridge, and Rockingham; and, the cities of Buena Vista, Harrisonburg, Lexington, Staunton, and Waynesboro. The CSPDC works with its member jurisdictions, communities and agencies to provide high quality planning, technical assistance and facilitation of services that address local, regional and state needs in an innovative, timely and cooperative manner.

About the SouthEast Regional Directors Institute

The SouthEast Regional Directors Institute (SERDI) is a voluntary professional development association for regional council executive directors and where appropriate, their councils and state associations in 12 southern states including Virginia. At the request of a member council, SERDI will design and conduct a strategic assessment of and for the council.

This complete record report of the SERDI CSPDC Voluntary Council Strategic Assessment contains an executive summary, which includes SERDI staff observations as well as recommendations resulting from work with participating Board, staff and other regional leaders throughout the process.

Following this executive summary, is the appendix which contains the following: (1) online membership survey and survey results (2) the complete record of the three focus group sessions held with regional leaders at Harrisonburg, Lexington, and Fishersville. Additionally, the CSPDC staff held a briefing-discussion session with the SERDI staff, and (3) PowerPoint of the assessment process presented at the February 6, 2013 CSPDC Board work session.
Executive Summary

SERDI Staff Observations

Before trying to understand the place or role(s) of the CSPDC to its region’s local governments and other local, regional, and state organizations, it must be recognized that the region that the CSPDC serves presents a challenge in building regional collaboration and focus. First and foremost, the CSPDC region is the largest PDC region in the Commonwealth at 3,439 square miles. Three of the counties contain the majority of the region’s population and all five of its cities. The other two counties are rural in nature, one of which is the least populated county in Virginia. The two counties are divided from the other three by multiple mountain ranges. Instead of it being a region that contains one major economic center by which the region is built around, the CSPDC region contains multiple economic centers that are divided by multiple miles. The layout of the region is often mentioned as a reason why regional collaboration and approaches are dismissed as too difficult.

It was clear in the review of the online survey responses, focus group sessions, and the Board of Directors work session, that there is a recognition that the CSPDC staff has done well in providing programs and technical assistance to its local governments and other organizations in the region, however, there is a question of whether the CSPDC can play an important role as the “convener of the region” as the place where the public and if applicable, the private sector leadership come together to focus on the opportunities, challenges, and issues that face the future of the region. The “convener” role is an increasingly important role for regional councils throughout the United States. The doubt that currently exist about the CSPDC playing that role goes back to the configuration of the region discussed previously, and, the diversity of the rural and urban make up of the communities have previously brought doubt that regional approaches were feasible or practical.

While there have been regional efforts and accomplishments supported by the CSPDC over its history, the region’s local governments have traditionally thought of the CSPDC as a technical assistance and grant writing organization period. The CSPDC’s local governments have not generally seen themselves as the owners of the CSPDC. The Board of Directors recognized at the February 6th work session that they have not done a good job of communicating back to the local governments and other entities regarding the initiatives, efforts, and accomplishments of the CSPDC Board and staff. It is recognized that if the CSPDC is to maximize its effectiveness, relevance, and support to the region’s local governments and to the region as a whole, that it must have its owners (local governments) fully engaged and using it as the place where the region’s public leadership comes together to address the opportunities, challenges, and issues that are regional in scope.

Recommendations for Consideration
Based on the survey, focus group and Board of Directors’ work session, the following recommendations are made for consideration:

• Ownership. It is important that the local governments in the region understand that they are the owners of the CSPDC. The officers and the executive director should prepare a
technical memorandum to outline the purpose and charge of the CSPDC, clearly
delineating the ownership of the organization.

The technical memorandum should be sent out with a cover letter from the Chair and
Executive Director calling for a meeting of the current Board to discuss the governing
structure and responsibilities of the Board and local governments to the organization
emphasizing the importance to reconnect to their organization and to discuss how the
CSPDC can maximize its role in supporting the region’s community economic
development enhancement and future.

Taking into account private sector or citizen membership that may be required as a recipient
of federal program funding (EDA and ARC), the counties, cities, and towns, need to make
a commitment of their involvement to the organization and to how the ownership is
represented on the Board.

• **An annual facts and issues input session should be conducted in each county with all
elected officials being invited to attend; with the CSPDC staff and officers chairing
and facilitating the meeting.** A work session should be held in each county (the
independent cities and towns that are contiguous to the county will participate in that
county session) once a year. Each county supervisor and city and town member and mayor
should be invited. Also participating in the meeting should be the officers, the executive
director, and if applicable, key senior staff, and the CSPDC Board members from the
applicable jurisdictions.

The session should be two-fold. It is an opportunity for the elected officials to hear about
their CSPDC. It is an opportunity to not only tell them about the purpose of the organization
but also, highlight the various programs and assistance offered through their organization.
Second, and maybe more important, it is an opportunity for the input from the elected
officials in those jurisdictions regarding their issues that the CSPDC might be able to
address, and possibly, if it is an issue across the region, to address on a regional basis.

• **A formal orientation program should be implemented for all Board members.** It is
important that the executive director develop an orientation program for all Board members
whether they are newly appointed or long standing in their membership. The new members
need to understand the history of the organization, why it was formed, the ownership, the
mission, the work program, and its offerings, etc. The veteran members always benefit
from a refresher course.

While it is time consuming, it will be time well spent. The executive director should
conduct the orientation at the workplace or other location of the board member’s choice.

One suggestion is to develop a orientation/Board Members 3-ring notebook should be
prepared that includes (1) an overview of the CSPDC which includes mission, staff
profiles/expertise, programs, Board member roster, etc. (2) Calendar of Meetings and other
events for the year (3) By-Laws (4) Enabling Legislation (5) etc. The notebook should have
pockets and dividers for the member to keep Board and other information materials that
are provided to him/her during the year. By providing this notebook, it will obviously be necessary for the Board materials to be three-hole punched.

- **Development of a Communications/Outreach/Public Relations Process.** Communication both internal and external are keys to the CSPDC becoming more relevant to its ownership and the partner organizations and the general citizenry of the Central Shenandoah region.

The executive director in concert with the staff should develop a strategy that includes social media, newspapers, television, and email blasts; as well as outreach presentations to local government council and commission meetings, civic clubs, etc.

The focus of the outreach should always be to inform the region of the CSPDC activities and to bring to light challenges and opportunities that region and its communities are facing. The ultimate goal in developing the communications/outreach strategy is to greatly reduce/eliminate people saying they really don’t know much about or know what the CSPDC does.

- **First, it’s about the region. Second, it’s about technical assistance, grant writing, and program administration.** This is the formula of successful and relevant regional councils in 2013 and beyond. It is a break from the traditional/historical regional council role of technical assistance; grant writing, and program administration period.

With the previous discussion regarding the geography and logistics of the CSPDC region, this is a particular challenge, but a challenge that must be tackled and if done right, can greatly enhance the role and relevancy of the CSPDC to its local governments, its partners, its region, and beyond.

The first step is to acknowledge that geography including topography and multiple economic centers exist and are a challenge to regional approaches to opportunities and issues that face the Central Shenandoah region.

The second step is to pronounce that there are challenges, opportunities, and issues that face the region regardless of a community’s location and whether its rural, urban, suburban, exurban. Acknowledge that status will very much decide how addressing a challenge, opportunity, or issue will take place and be implemented. Acknowledge that the size and complexity of the region will demand sub-region strategy development and implementation.

The third step is to bring the chief elected official from each county, town, and city in the region together with or without their manager/administrator to identify the truly regional challenges, opportunities, or issues that, if addressed would be beneficial to the region (could also come from the annual county information sessions).

The fourth step will be to identify how the CSPDC staff and Board can help the chief elected officials address the identified topic and to identify how strategies and their
implementation can be addressed on a sub-regional basis. Depending on the challenge, issue, or opportunity, sub-regions may vary. If this process is successful, the CSPDC will naturally become the “convener of the region,” the neutral place in the region, seen by all as the place to consider the regional task at hand.

Finally, when the CSPDC begins to focus more of its attention on regional initiatives and strategies, its role of its staff providing technical assistance, grant writing, and administration become important in a very supportive, pertinent, and significant way.

- **Hosting regularly scheduled roundtables of local government staff.** As part of the reconnecting of the owners to their CSPDC, and focusing on the big picture regional opportunities and challenges, it will be important to build and/or strengthen the working relationships with local government professional staff, and secondarily any applicable regional partner professional staff. The CSPDC should host on a regularly scheduled basis, roundtable sessions with planners, public work directors, GIS professionals, etc. to share best practices and/or to consider the current challenges facing the region in their expertise area, or to address how to best handle directives coming from Richmond or Washington, DC.

- **Being Complimentary or Supportive to Communication Efforts with the State.** Communication of thoughts, needs, concerns, approaches to serving local governments through PDC efforts in collaboration or cooperation with state government is a major objective of the Virginia Association of Planning District Commissions. There was enough comment made during the assessment process regarding having as good a relationship with Richmond as possible that efforts should be made at the CSPDC regional level to supplement and complement the efforts at the state level.

Consideration should be given to the late fall or December CSPDC Board meeting being focused on the upcoming Legislative session...inviting the region’s legislative delegation. Other regional councils have found holding such a meeting very helpful in strengthening the understanding of the council with their delegation, and provide an opportunity for the delegation to discuss their upcoming legislative session. It also gives local government leaders the opportunity to provide input to the delegation of the local perspective of how Richmond is helping or causing issues for local government in the region.

Building upon the efforts of the state association with key state agency heads, consideration should be given to having the executive director and officers visit with those agency heads once or twice per year in Richmond and/or invite applicable agency heads to be a guest speaker at a CSPDC Board meeting.