Merger Participant Feedback and Adopted Courses of Action

Merger Management Team

August 14, 2014

Merger Management Team (MMT)

- Why was it formed?

- What is current purpose of the team?

- Membership

Formation of MMT

- Originally formed immediately following Merger 01 process improvement in 2001 as the Merger Implementation Team (MIT)

- Purpose to implement the Merger 01 process

- Group's first work effort involved developing a narrative that outlined the steps in the Merger 01 process (also developed MOU, Merger screening criteria, Dispute resolution process)

MMT Current Focus

- Switched from MIT to MMT

- Identifies areas of improvement

- Supports initiatives for process improvements

- Discusses issues as they arise

- Involved in the Process Dispute Resolution Process

MMT Membership/Attendees

Staff from Four Primary Agencies, meets on a monthly basis

NCDOT   Debbie Barbour, Richard Hancock,
Jamie Shern, Rob Hanson, Jennifer Harris,
Teresa Hart, Eric Midkiff, David Smith

NCDENR   Cyndi Karoly, Amy Chapman

DCM   Doug Huggett, Cathy Brittingham

FHWA   Clarence Coleman, Donna Dancausse,
Donnie Brew

USACE   Henry Wicker, Andy Williams

Interagency Leadership Team (ILT) Status

Same Agencies *Plus….*

- NC Dept. of Agriculture and Consumer Services *
- NC Dept. of Commerce*
- NC Dept. of Cultural Resources*
- NC Dept. of Environment and Natural Resources *
- NC Dept. of Transportation*
- NC Wildlife Resources Commission
- US Army Corps of Engineers - Wilmington District
- US Dept. of Commerce - National Marine Fisheries Service
- US Environmental Protection Agency
- US Dept. of Transportation - Federal Highway Administration
- US Fish and Wildlife Service*
- *Governor's Office, Office of Policy*
- *Governor's Office, OSBM, NC GEAR*
- * New agency representative(s)*

ILT: New Beginnings

- Secretary Tata Brief to Governor's Cabinet Governor McCrory Endorsement

- 4 Meetings since Nov 2013

- Focus on……
  - Understanding Agency's Mission and Priorities
  - Identification of ILT Opportunities

Potential Opportunities: Themes

- Support and Advancement of NC's Economy

- Challenges Associated with Population Growth

- Efficient Stewardship & Management of Property

- Efficient Use of Technology

- Planning and Working Together
  - Establishing partnerships
  - Joint Infrastructure Planning
  - Programmatic Approaches
  - Merger Process

ILT: Selected Focus Areas

- GIS
- Merger
- Integrated, Interagency Long Range Planning

Next Meeting:

Sept 19th on GIS and Merger

Merger Participant Feedback

What We've Learned: Strengths and Opportunities

Strengths based on

- 176 Surveys
- Nov 2013 – March 2014
- 18 meetings

Opportunities based on

- 176 Surveys
- Merger Facilitation Workshops: Challenges & Improvements

Merger Survey Questions

Pre-meeting Efforts
- Were packets provided at least 2 weeks in advance?
- Was substantive new or updated info provided that should have been sent prior?
- Was info in packet useful and relevant?
- Were substantial concerns raised that could/should have been raised in advance?

Meeting Effectiveness
- Did participants conduct themselves in a collaborative problem-solving manner?
- Were participants prepared?
- Was meeting efficient and productive?
- Did discussion stay on track with agenda?
- Did team members communicate their agency's views?
- Did team reach concurrence?
- Were next steps and/or actions identified and clearly communicated?
- Were all members present, in person or on phone?

Optional
- What went well?
- What could have been done better?

Our Strengths

- Team members **communicate their agency's views**

- Participants conduct themselves in a **collaborative, problem solving manner**

- **Information in meeting packet** was useful and relevant

- Participants are **prepared**

Themes: Merger Facilitation Workshops

Better define and understand Roles and Responsibilities

- Ensure they are clear, viable and balanced

Enhance our Preparation:

- manage surprises & issues,
- better communication outside of meetings,
- prepare appropriate data & studies,
- better understand project schedule...

Themes: Merger Facilitation Workshop

Keep Discussion/Participation Focused and On Track

- Engage the "right" people; have a manageable number and required expertise; use facilitation techniques

Build Relationships

- Build knowledge, understanding and trust in forums outside of typical merger meetings

Our Opportunities

Surveys

Workshop

Reaching Concurrence

Clarify Roles

Enhance our Preparation:
-Packets 2 weeks in advance; adequate time to prep and review
-Send Updates prior to meeting
- Raising concerns; getting surprises
-Rushing to concurrence
-Communication outside of meeting
-Appropriate data/studies conducted
- Handle issues so don't derail mtg
-Having efficient/productive meetings
-Identify next steps/actions

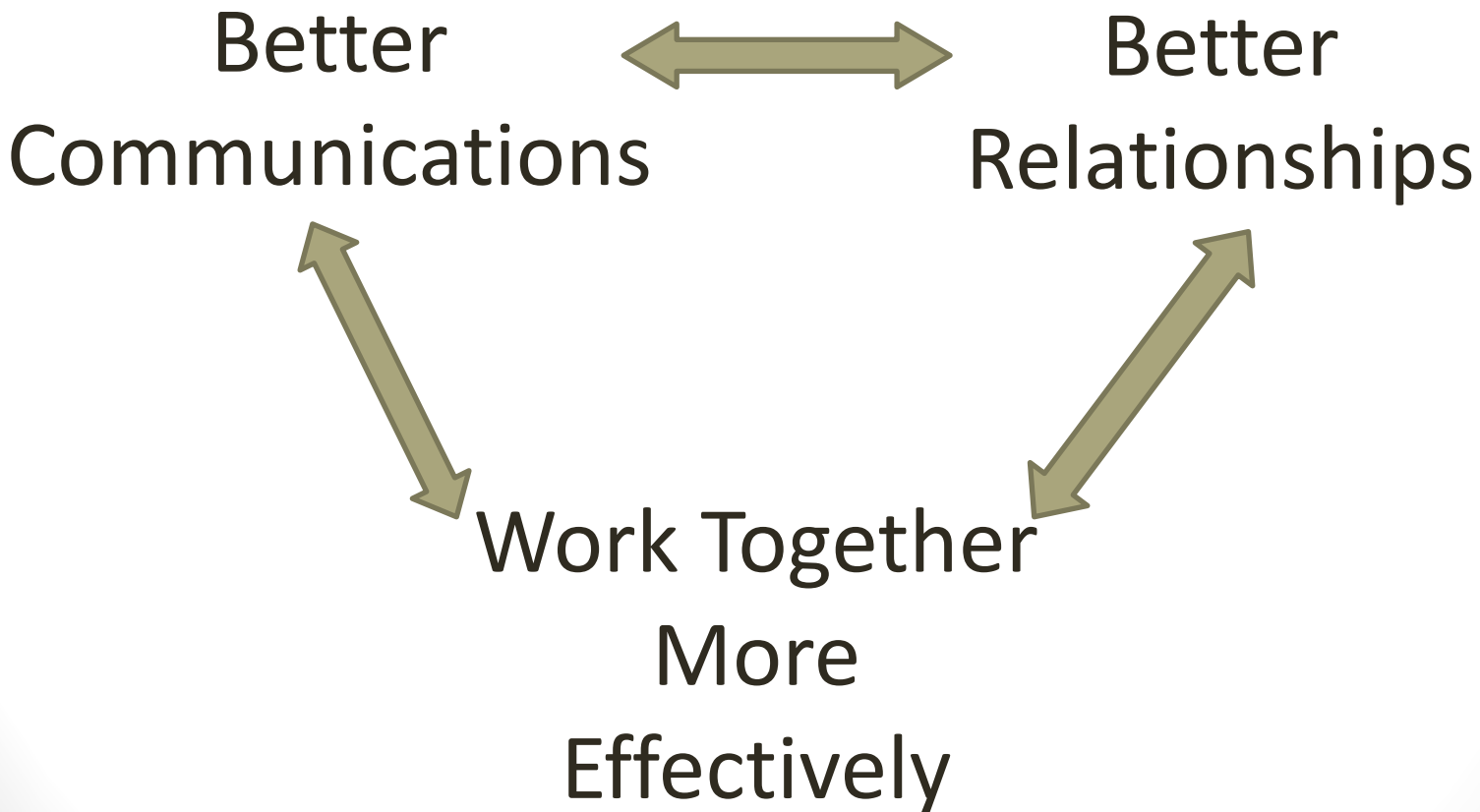Ensure all members attend

Build Relationships

Keeping Meetings Focused
Discussion on track with agenda

Our Courses of Action

Participant Desired Outcomes

Better Communications ⟷ Better Relationships

Work Together More Effectively

Hold Regular Interagency Forums

Why:

- Continue to build and enhance relationships
- Provide education and training across organizations

How:

- Bi-monthly Interagency Meetings: standard format and varied/expanded (larger venue, audience)

Topics:

- October (standard): NCDOT Project Timeline
- December (expanded): Showcase Agency (DCR) and MMT Effective Strategies
- Early 2015 (standard): Results of Transportation Prioritization Process

Hold Regular Interagency Forums

Possible Topics:

- Different Agencies' Missions and Responsibilities
- Hot Topics/Recurring Issues
- Sharing "Effective Strategies Toolkit"
- Project Accomplishments and Lessons Learned
- Skill-building Sessions: communications; facilitation, conflict management; etc.

- Others????

Hold Interagency Training

Why:

- Continuous Improvement/skills building
- Continue to build and enhance relationships

How:

- MMT Sponsored; 1-2 each year

 2014- 2015 Topics: (technical or skills)

- Conflict Management/Resolution – by June 2015
- NEPA (August 2014)

Future:

- Negotiation Skills
- Effective Communication
- Time Management
- Technical Topics (NEPA, Clean Water Act, etc.)
- Merger Process

Develop & Promote Effective Strategies

Why:

- Continuous Improvement; enhance how project teams operate

How:

- MMT update/clarify Roles and Responsibilities

- Document standard expectations and examples of effective strategies

- Share at December 2014 Interagency Forum

- Establishes basis for "Effective Strategies Toolbox"

Develop & Promote Effective Strategies

Possible Format and Topics:

Before Meeting

- Confirm issues prior to meeting
- Pre-meetings (in person, webinar, phone…)

During Meeting

- Project schedule timeline
- Planning next milestones and actions

Post Meeting

- Follow-up on actions
- Keep team updated on project status

       -newsletters, electronic project files/sites

       - Informational meetings