

SUMMARY OF PERFORMANCE REVIEW RESULTS

Ms. Julie W. Regan, Executive Director
Tahoe Regional Planning Agency
December 13, 2023

Process:

Feedback on Julie Regan's performance this year is based on the time frame of December 2022 to November 2023. Ms. Regan wrote a self-assessment of her overall accomplishments for the above noted time period, which was e-mailed to two groups consisting of: all Governing Board members, all TRPA Staff members. All respondents were sent a confidential, anonymous survey link which asked for feedback on Ms. Regan's level of overall goal attainment and her performance on TRPA Core Leadership Competencies. Respondents rated her performance using a scale of *Exceptional, Fully Effective/Achieved, Effective/Achieved, Partially Effective/Achieved, Conditional Achievement/Needs Improvement*. In addition, there were three open ended questions (one asked for feedback on the ranked competencies, one was reflective of the past review period, and one focused on the future).

Additionally, a third group of agency partners was also asked to evaluate Ms. Regan's effectiveness as the Executive Director of the TRPA. This survey consisted of 4 questions that were ranked from Strongly Agree to Strongly Disagree, and 6 open ended questions that requested feedback on Ms. Regan's strengths, what the partner agency would like to see the Executive Director start doing, continue doing and stop doing, as well as feedback and suggestions for the next one to two years.

Response Groups and participation rates from TRPA Staff and Governing Board:

Governing Board: 7 (19%)

TRPA Staff: 30 (81%)

Overall Results: Both Respondent Groups

Both groups – representing 37 respondents – marked Julie *Exceptional* for 47% of all responses, *Fully Effective/Achieved* for 37% of all responses, *Effective/Achieved* for 11% of all responses, *Partially Effective/Achieved* for 2.5% of all responses, and *Needs Improvement* for 2.5% of all responses for all questions posed.

Specific Results: Both Respondent Groups

Question 1: Referring to both your own experience and Ms. Regan's written summary, please rate her overall level of goal attainment for December 2022 to November 2023:

35% ranked Ms. Regan Exceptional, 46% ranked her Fully Effective/Achieved, 16% ranked her Effective/Achieved, and 3% ranked her Needs Improvement.

Rankings based on TRPA's Executive Director Core Competencies:

- **Leadership:** Seeing the big picture and the large landscape. Having a clear vision for the future of the agency and its mission and being responsive in setting direction to the Board's priorities.

51% ranked Ms. Regan as Exceptional, 32% Fully Effective/Achieved, 11% Effective/ Achieved, 3% Partially Effective/Achieved, and 3% Needs Improvement.

- **Strategic Management -- Shaping Strategy & Driving Execution:** Keep abreast of important trends. Constantly assessing the organization's status and perceptions of its effectiveness. Foresee obstacles and can solve problems. Also foresee opportunities and know when to step through an open door.

41% ranked Ms. Regan as Exceptional, 41% Fully Effective/Achieved, 11% Effective/Achieved, 3% Partially Effective/Achieved, and 5% Needs Improvement.

- **Breadth & Depth of Business Knowledge:** The Executive Director must be or become conversant in Tahoe knowledge, familiar with the underpinnings of a broad spectrum of specialized topics and operational details of a multitude of complex systems, and work in cross-functional capacity.

68% ranked Ms. Regan as Exceptional, 22% Fully Effective/Achieved, 8% as Effective/Achieved, and 3% Partially Effective/Achieved.

- **Communication, Influencing, and Negotiation:** This skill set is far reaching and complex, including the ability to positively influence, negotiate, and inspire trust with a mix of fairness, candor, respect, ethics, and integrity.

54% ranked Ms. Regan as Exceptional, 35% as Fully Effective/Achieved, 8% as Effective/Achieved, and 3% Needs Improvement

- **Seasoned & Critical Thinking:** Seasoned judgment -- sort through complex issues and relationships, determine the critical information, make tough calls at the right time. Break through external and internal resistance. Anticipate and manage problems before they escalate. Manage through ambiguity, with imperfect information and around political shoals.

27% ranked Ms. Regan as Exceptional, 54% Fully Effective/Achieved, 11% as Effective/Achieved, 5% Partially Effective/Achieved, and 3% Needs Improvement.

- **Interpersonal & Self-Management:** The abilities to be adaptable, confident, versatile, drive for success, understand others, and model desired behavior.

54% ranked Ms. Regan as Exceptional, 32% Fully Effective/Achieved, and 11% Effective/Achieved, and 3% at Partially Effective/Achieved.

Open Ended Questions:

Themes from the optional “Comments” based on the rankings of the core competencies can be summarized as follows: “Ms. Regan has done an amazing job building and supporting the team; still finding her way into new role, look forward to watching her style and leadership evolve; enthusiasm and energy are remarkable; has accomplished a great deal in her one year as Executive Director; great example of collaboration and coordination; knowledgeable about the dynamics in Tahoe; listens to staff; appreciate the leadership and facilitation brought to the Board as we have transitioned staff, and Board. Her performance is strong and focused, organized strategic priorities. Marginal effort to garner Board priorities. Not clear when and how Board members can initiate consideration of issues. Do not always feel I am getting the real information.”

When asked to comment on which results stand out from the year, themes addressed staff retention, openness and support/encouragement of staff, feeling part of a team, effectively managed transition, instills confidence with staff, demonstrates responsiveness and improvement of her leadership, communication and approach to guiding the agency, took action on a number of items the Board identified in the strategic planning effort, progress on Destination Stewardship, Housing initiatives, increased funding and 7-7-7.

When asked to make suggestions for the next one to two years, responses ranged from “keep up the good work, be more verbal during GB meeting; let go of some approvals and delegate to others to improve work flow; keep talking to staff and checking in; monthly communication that ties the work we are doing with our strategy and timelines; don’t oversubscribe yourself and take time to reflect and think strategically; delegate; assess projects, programs and initiatives and be realistic about staff capacity and timelines; lead discussions on mobility options; continue board retreats and community engagement meetings; have more tough technical conversations that are not so easy and slickly laid out; be okay with causing waves; challenge staff and board to be more focused and selective on issues we choose to engage in.

Feedback from Agency Partners

Agency partners answered 4 questions that were ranked from Strongly Agree to Strongly Disagree, as well as 6 open ended questions. The responses are as follows:

1. The Executive Director of the TRPA works collaboratively with me and my organization to push forward key initiatives for the Tahoe basin.

75% Strongly Agreed and 25% Agreed

2. The Executive Director of the TRPA exhibits strong communication skills that are clear and effective.

75% Agreed, 25% Disagreed

3. TRPA's Executive Director is effective at establishing, building and maintaining relationships while helping build consensus among partner groups.

100% Agreed

4. The Executive Director of the TRPA understands the broad spectrum of specialized topics and issues facing the Lake Tahoe Basin.

75% Strongly Agreed, 25% Agreed

Open Ended Questions:

Please provide any comments you would like to add based on the questions answered/ranked above:

I think the Executive Director and the organization are losing the public relations battle with the anti-development groups. I'd like to see her focus on a stronger comms plan to change the narrative; Julie has a very strong grasp of all that is going on in the Tahoe Basin and the surrounding area. She is politically savvy. She communicates well with me and others. She has established many relationships during her career at TRPA that are beneficial to meeting the agency's mission; I have the utmost respect for Julie and am honored to work with her. There is no question that she is passionate about her role, the organization and the team she has built over the last year. She is a strong thought partner and leader in the community and a superwoman in her engagement in many things inside and outside of work. I think she has the potential to be an effective and exceptional leader.

What would you say are the TRPA's Executive Directors strengths:

Her vast knowledge of the issues, the history of the Basin, the relationships she has with leaders within and outside the Basin. Her ability to navigate through and collaborate with others to resolve issues. Her upbeat and solution oriented attitude; The executive director's willingness and ability to forge new relationships and work on strengthening existing relationships has proven to be valuable. The executive director and TRPA branched out through the Destination Stewardship initiative to bring the private sector to the table, one of the first times agencies and visitor organizations worked together. The executive director also has a great ability to step out in a public or political forum to speak about the Basin's successes and needs; Passion; knowledge of the players, issues and historical context in Tahoe; building an exceptional team at TRPA; responsiveness; willingness to meet on tough issues, dedication and experience.

What is one thing that you would like to see TRPA's Executive Director start doing?

Develop a communication plan to take control of the redevelopment narrative. It feels incredibly divisive in the Basin right now. She needs to step up into a leadership role in this space; Better coordination with me prior to Washington, DC visits especially when meeting on issues of mutual concerns with the Federal Delegation; TRPA has appropriately been focused on destination stewardship, housing, and transportation recently. These are incredibly high priority issues for the Basin. However, I believe there are stronger linkages between these issues and environmental health than we may understand with the current state of knowledge. I think there is an opportunity for the executive director of TRPA to drive an effort to better understand the linkage between these issues and environmental health so that Basin managers can align their efforts to yield the greatest impact; Take tough stands on issues that might be controversial, elevate the agency's role in accountability and implementation of plans and mitigation requirements, speak more honestly with the public and be less of a "cheerleader" for the organization.

What is one thing you would like to see TRPA's Executive Director continue doing?

Convening partners to help solve problems; sharing her insights of the issues and ideas for addressing them; I encourage the executive director of TRPA to continue to connect with peer agencies in smaller settings than TIE to really understand each other's priorities and pressures; Supporting and empowering her team and engaging with the broader conservation community to bring outside solutions to Tahoe,

What is one thing you would like to see TRPA's Executive Director stop doing?

Ignoring the current hostile environment in the Basin; Pause in creation of new plans until we can collectively make progress on current plans and objectives.

Looking forward to the next one to two years, what one idea or suggestion would you make to TRPA's Executive Director?

Step up into a true leadership role and address the growing group of anti-development folks. The TRPA's reputation is in need of repair right now. It won't happen overnight, but it's critical to the health of the Basin to shift this dynamic; make meaningful progress around Destination Stewardship and finding the right balance between ecological health and human occupation and development of the Lake Tahoe Basin; leverage the wealth in the Tahoe Basin to address the needs of the Basin and not depend so heavily on government funding, which is always an uncertainty; The extremes of climate change are having a much greater and acute impact on the Basin than previously imagined. I think there is value in TRPA's executive director bringing together managing agencies to have a conversation about taking a more holistic view around land management needs and concerns when it comes to administrative actions like permitting. Similarly, I think TRPA can help initiate a conversation and coordinate among managing agencies about how to best protect our communities from the impacts of extreme climate events and agencies roles in mitigating those; Shift resources and attention to ensuring implementation of mitigation measures and assessment of benchmark and regional goals.