



IOWA FINANCE
AUTHORITY

**IOWA FINANCE AUTHORITY
PLANNING WORKSHOP
December 5 and 6**

Honey Creek Resort near Moravia, Iowa

Facilitator: Bob Rafferty, The Rafferty Group

Monday, December 5 – 5:30 p.m. Social Hour

6:30 p.m. Dinner

7:15 p.m. Discussion, Setting the Stage for Tuesday

Tuesday, December 6 – 8:00 a.m. – 3:30 p.m.

Objective of Session

- Board members gain better understanding of the Iowa Finance Authority
- Board members gain better understanding of each other and staff
- Board members develop shared sense of vision and mission of the organization
- Draft of high level goals developed
- Board and staff roles are clarified in achieving vision, mission and goals of the organization

Monday Dinner Session

- Introduction to the potential of Iowa Finance Authority
 - With the Iowa Finance Authority's key programs, what societal goals were being addressed? We want to answer the question - What is the Iowa Finance Authority's role? Why does it exist?
 - What are the passions, hopes, interests of individual board members and staff regarding IFA?

Tuesday Session

Icebreaker, Introductions

Review discussion from night before – what are IFA’s key roles? What is its mission?

- Review strengths, weaknesses
- Discuss – how can the Iowa Finance Authority have the most significant impact on its mission?

Dialogue with Staff in Key Areas

- Being realistic, but assuming innovation, creativity and execution, what ideally would the Iowa Finance Authority look like in 5 years? What results would it hope to achieve? This will involve targeting top 3 to 5 key areas.

Board Roles and Staff Roles

- How should the board operate to best support and enable IFA to achieve the identified results?
- What would the staff responsibilities and roles be?
- Delegation of Authority

Conclusion, Next Steps