

# Leadership Academy Part II Toolkit

## Executive summary

The purpose of the Leadership Academy Part II Toolkit is to provide management with a framework for offering advanced experiential training opportunities to employees who have already completed the Public Sector Leadership Academy. The toolkit provides a suggested outline for program structure and a number of a la carte templates which can be included, excluded, or expanded upon depending on the interest, size, and capacity of the organization. This toolkit is not intended to be a turnkey operation but rather a base upon which agencies can build to create their own customized solutions.

## Key program features

*What:* Agency-driven, internally-sourced, temporary project(s) similar to the Management Talent Exchange Program (MTEP) in Santa Clara and San Mateo Counties

- Scope should be manageable within a defined timeframe
- Complexity should be sufficient to provide aspiring leaders with a rewarding challenge

*Who:* Leaders and aspiring leaders across the organization

- Department or division heads
  - Identify and scope potential project(s) within purview
  - Ensure capacity to support the project and assists with overcoming major roadblocks
- Project champions and facilitators
  - Pitch and explain the project plan and goals to prospective participants
  - Serve as subject-matter experts, department/division liaisons, and coordinators
- Leadership Academy graduates
  - Graduates of the Public Sector Leadership Academy seeking to cement their classroom learning with practical experience
  - Staff interested in increasing their skill sets, broadening their exposure to the organization, and increasing impact

*Why:* Provide professional development to both project participants and project champions

- Signal to staff members that their skills are valued and that the organization is willing to invest in them further
- Complete projects which otherwise may not have the necessary resources due to capacity constraints, vacancies, and/or skill mismatches by incumbents
- Identify possible career advancement opportunities for staff with hidden or underutilized talents

## Items in the toolkit

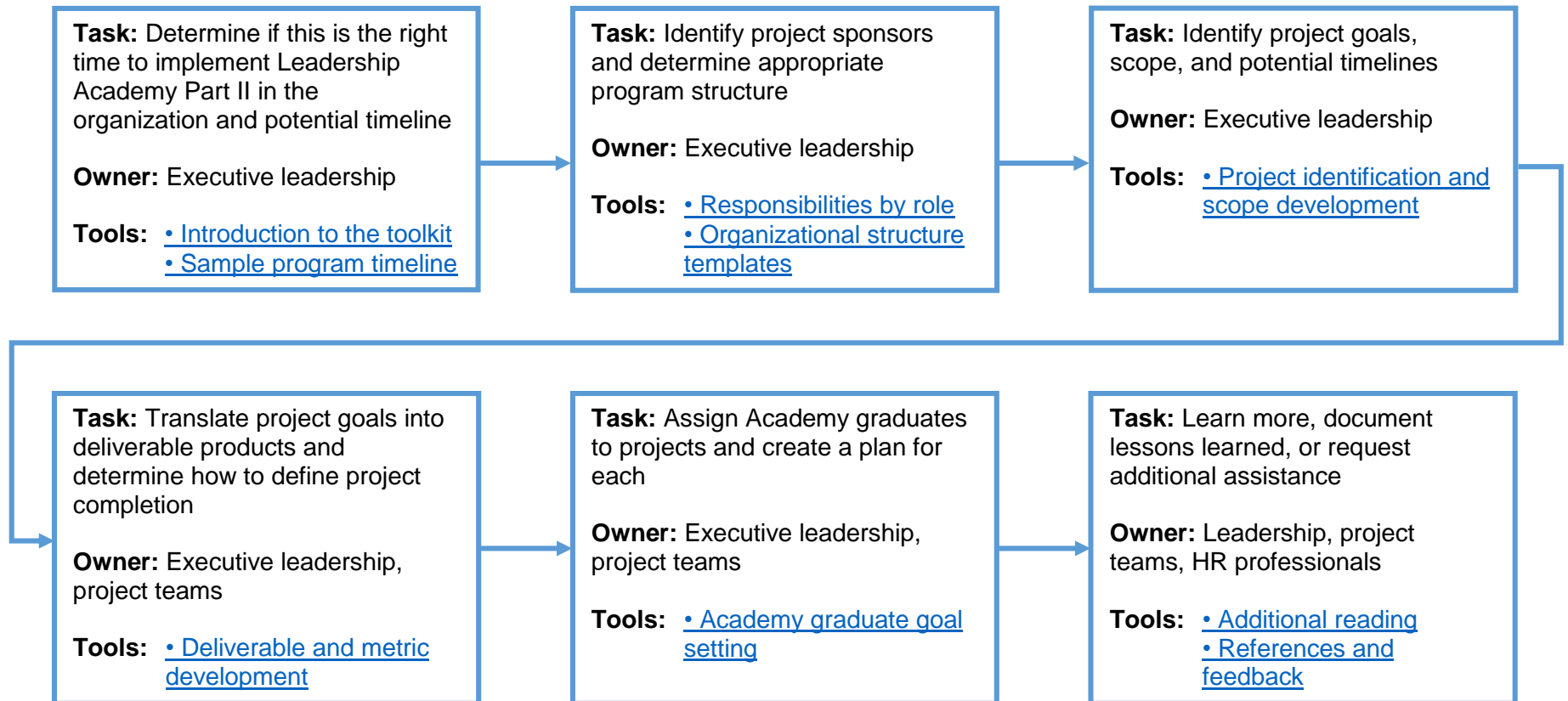
Templates and suggestions to help agencies:

- Outline of suggested responsibilities by role
- Project identification, summary, and scoping assistance tools
- Program work plan templates
- Deliverable and metric development suggestions
- Participant goal-setting template



## Process outline

The flow chart below outlines many of the steps a Leadership Academy Part II program may take, though no step is mandatory. Each step contains a link directly to the corresponding section(s) - (**Ctrl + Click** to follow).



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## Introduction

### About the Leadership Academy Part II toolkit

The Regional Training and Development Consortium’s Public Sector Leadership Academy is an invaluable opportunity for experienced senior leaders to teach current and future leaders in a classroom environment. As the culmination of a number of Consortium courses meant to provide professional growth, City Managers recognized the opportunity the Leadership Academy provided and asked for ways to continue developing their leaders.

The Leadership Academy Part II toolkit is a framework compiled to attempt to answer City Managers’ request by leveraging experiential learning to build on



the knowledge graduates gained in the Leadership Academy classrooms. Agencies can utilize the toolkit to continue the professional development of their Academy graduates while simultaneously completing projects that advance the agency’s goals.

Modeled after programs such as the Management Talent Exchange Program (MTEP) in Santa Clara and San Mateo Counties and the City of Daly City’s Succession Academy, the Leadership Academy Part II helps to find mutual benefit for employees and organizations by placing current staff members to complete short-term, impactful projects. Projects are sourced internally within an agency and assigned to Academy graduates as part-time assignments lasting anywhere from weeks to months.

In order to accommodate the range of priorities, resources, and cultures between organizations, the Leadership Academy Part II toolkit is organized not as a “one size fits all” turnkey operation but rather as a conceptual framework for finding, scoping, and accomplishing projects. The toolkit provides a number of sample or template tools to organize thoughts and guide program development, each of which may be included or excluded as needed. The remaining key ingredient – knowledge about the organization’s capabilities, culture, and needs – is left to each agency’s respective leadership.

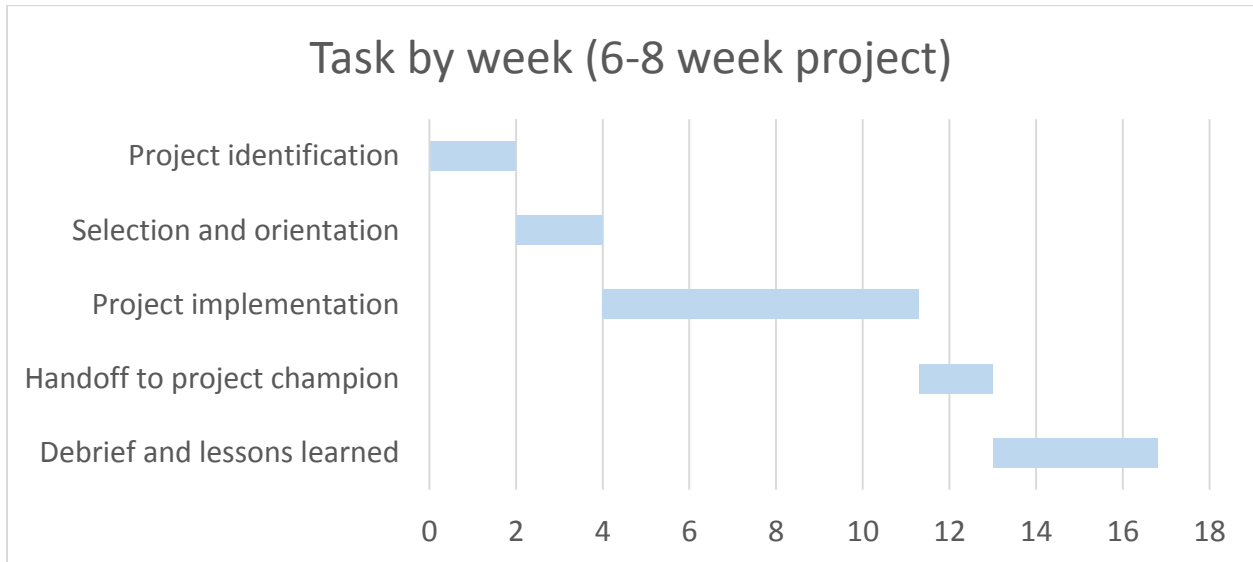
### Example projects

Scope	Desired outcome	Size and timeline	Project basis
Major project, large organization	End-to-end review of the budget development process	Multiple staff members, full-time, 12-16 weeks	<b>Public Sector Principles:</b> Full-scale process redesign is not conducive to incremental change
Major project, small organization	Development of comprehensive onboarding process for new hires	Single staff member, full-time, 8-12 weeks	<b>Employee Engagement:</b> Requires full-time commitment and knowledge of organization
Minor project, large organization	Assessment of neighborhood’s preferred communication techniques	Variable depending on staff availability	<b>Civic Engagement:</b> Valuable knowledge but not critical to the agency



## Sample program timeline

Timelines, steps, and dependencies vary between organizations, but a typical work plan may span approximately twice the expected project length.



Link: [Gantt chart template](#) – use this template to easily create and modify program or project work plans

## Suggested responsibilities by role

The critical responsibilities are that of the project sponsor and the Academy graduate participating in the project, but additional roles may be available as the project scope and organizational capacity allow.

### Project sponsor

**Role:** The project sponsor has broad latitude to determine which projects meet organizational goals, what resources are available for the project, and what constitutes project completion. Project sponsors are likely not involved in day-to-day project completion, but have the influence and resources to help remove major roadblocks that Academy graduates may encounter.

#### Responsibilities:

- Identify potential project(s) within purview
- Ensure that there is sufficient capacity within the scope of authority to support a project
- Assist with overcoming major roadblocks

**Organizational level:** Directors, Managers

### Project champion

**Role:** The project champion is the day-to-day liaison with the Academy graduate and works to build buy-in as the project is developed, answer department- or division-specific questions, and serves as the subject matter

expert with regard to the skills and knowledge necessary to successfully complete the project. The project champion is also responsible for ensuring that work products are implemented upon project completion.

**Responsibilities:**

- Pitch the project to potential project participants
- Serve as the subject-matter expert and department/division liaison
- Exercise a relatively wide scope of authority in order to ensure that recommendations are pursued
- Overall responsibility for implementation

**Organizational level:** Managers, Mid-managers

### Program facilitators

**Role:** Program facilitators work organization-wide to source, scope, develop, and coordinate projects but are not involved in the day-to-day work of any single project. This role is ideal for a training coordinator or generalist project manager responsible for agency-level special or training projects.

**Responsibilities:**

- Solicit projects from division/department heads, help to define scope, and facilitate communication of projects to organization
- Help to identify skill sets of participants and match those participants to projects
- Provide some coordination between project champions and participants (e.g. scheduling, conflict management, resource identification)
- Check in on timelines and ensure that projects continue to move forward
- Provide year-to-year continuity for the program

**Organizational level:** Varies

### Academy graduates

**Role:** Employees who have completed the Public Sector Leadership Academy and who want the opportunity to put those skills into use in a hands-on setting. Academy graduates do the majority of the work for identified projects and are responsible for meeting the goals and providing deliverables outlined by the project sponsor.

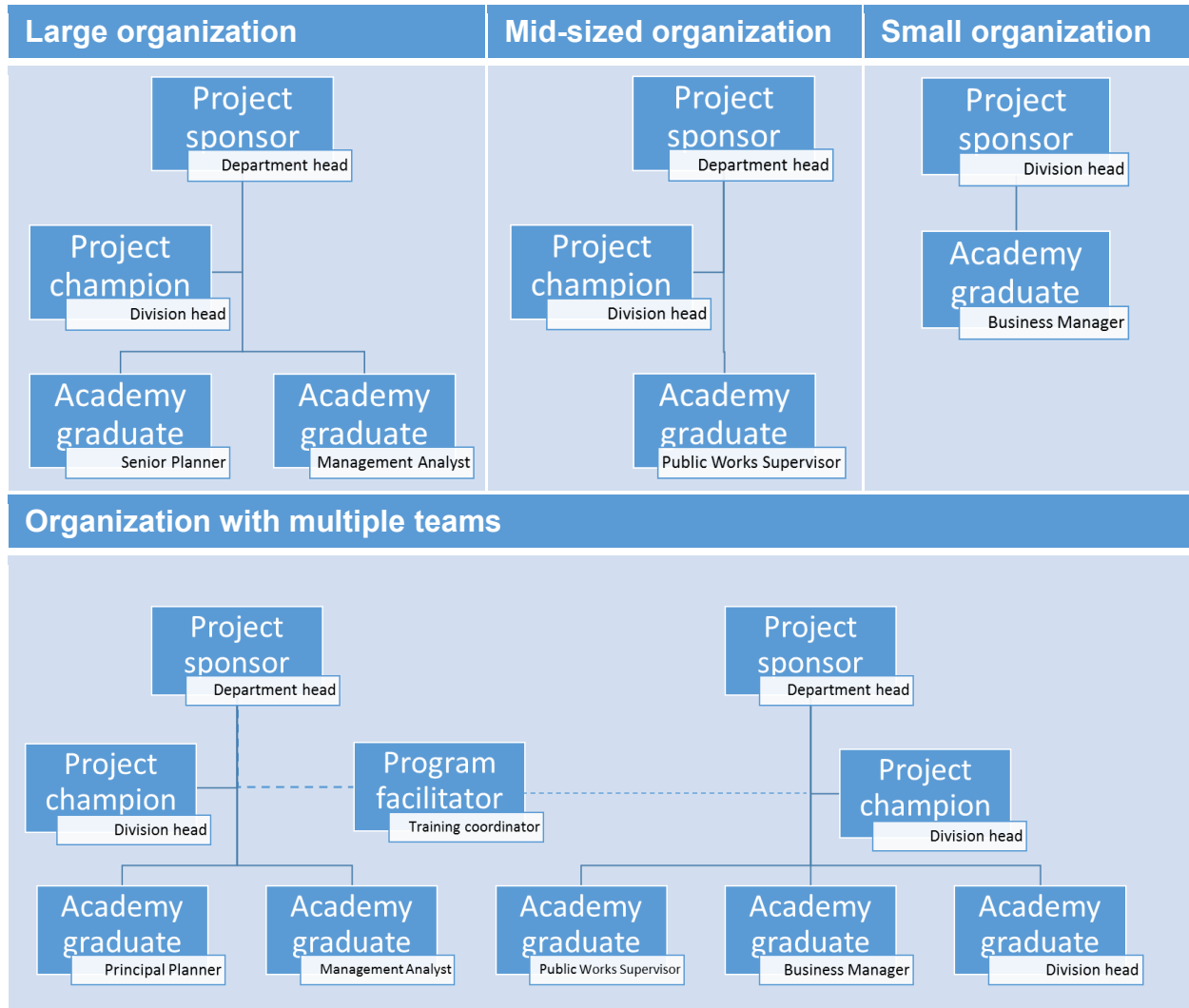
**Responsibilities:**

- Desire to develop leadership skills and provide additional value to the organization
- Complete the project deliverables and goals as determined by the project sponsor
- Identify personal developmental goals
- Provide feedback to improve future iterations of the program

**Organizational level:** Varies

## Organizational structure templates

Project structure is scalable and dependent on a given agency's resources, including staff available. For smaller organizations, this may mean a program which involves only two people on a single team, while larger organizations may see dozens of Academy graduates organized into multiple teams. Included below are examples for large organizations, mid-sized organizations, and small organizations.



## Project identification and scope development

As an agency-driven effort, Leadership Academy Part II projects are internally-sourced by the organization's leaders. Agency leadership is ultimately responsible for determining which projects are selected, how Academy graduates are assigned to projects, and how teams are structured. Strategies for assigning Academy graduates to projects may vary depending on the number of projects, interested graduates, or supporting resources available.

### Key considerations

- There should be some measurable impact on the organization's goals
- Skill development ideally utilizes some of the Public Sector Leadership Academy's course topics
- The scope should be manageable within a defined timeframe
- Projects may be part-time alongside regular job duties or full-time for a limited duration
- Complexity should be such that aspiring leaders will find it challenging and rewarding

### Sample project solicitation prompts

- Title of the project
- Short description of the project (200-500 words)
- Project goals
- Minimum skills required
- Additional skills or interests which would be valuable
- Expected time requirement, for instance:
  - 20 hours/week for 8-12 weeks
  - 40 hours/week for 6 weeks
  - 200 total hours over 6-8 weeks
- Example deliverable(s)
- Project champion

## Deliverable and metric development

Successful projects necessarily start with a definition of what constitutes success. Goals are the results that projects should produce, deliverables are the specific work products to be completed, and a metric is the standard to which a deliverable is held.

### Key considerations

- Overall workload and expectations should match the time/duration allocation for the project
- The SMART acronym – Specific, Measurable, Achievable, Relevant, Time-bound – is a good baseline for developing goals, deliverables, and metrics
- There may be room for interpretation or changes in deliverables – be clear where this is or is not the case
- Metrics should be objective and clearly define the difference between a deliverable that meets expectations and one that does not





## Goal outline template

Project goal	Deliverable	Metric
What do we want this project to accomplish?	What product(s) should be turned in/handed off at the end of the project?	What criterion/criteria will be used to determine whether a deliverable meets expectations?
<i>Example:</i> Understand the current onboarding process	“Current state” process map including steps, owners, and dependencies	Identification of at least four process steps and three stakeholders
<i>Example:</i> Identify the differences in a given process between departments	Visual reference sheet or set of checklists	Successful analysis highlighting substantive differences between Departments A and B

## Participant goal setting

One goal in implementing the Leadership Academy Part II is to provide professional development opportunities for the organization’s Academy graduates. Goal setting may be used as an input to project assignment and should be incorporated at some point early in the overall process.

### Key considerations

- Participant goals should follow a similar form to project goals, e.g. using the SMART criteria
- Participant goals will likely differ from their current skill set – projects should allow room for this
- In cases of direct conflict, leadership should make a determination whether participant or project goals are subordinate

### Sample goal-setting questions

- Would your preferred project develop current skills or new skills?
- Which skill or competency would you most like to hone?
- Which Leadership Academy topic (e.g. Civic Engagement or Ethics) would you most like to focus on?
- Is there a position within the agency which exemplifies the skill set you would like to build?
- Following successful completion of this project, how would your stellar resume bullet describe it?

## Additional reading

Articles and web pages from the City of Daly City, ICMA, MTEP, and Harvard Business Review all describe the virtues of similar programs, linked below its respective excerpt.

*“I-MTEP offers a wealth of personal and professional development opportunities. It also provides an excellent vehicle for collaboration and*



*problem solving for employees and department heads. Participants can step outside their comfort zone and are tasked with researching, developing, and presenting solutions to the city's current operational challenges.*

*Employees exit the program with a greater understanding of their individual strengths and weaknesses and with sharpened analytical, management, and interpersonal skills.”*

[Martel, P., Maltbie, S., & Bond, J.](#) (2011, May). What Will Help Next Generation Leaders Advance? Daly City's Internal Management Talent Exchange Program Is the Future. *Public Management*. [Pages 18-20]

*“MTEP accelerates the development of aspiring leaders because it goes beyond classroom education and provides new real-life experiences in another organizational environment coupled with candid and helpful coaching”*

Management Talent Exchange Programs. (n.d.). Retrieved November 8, 2017, from <https://icma.org/management-talent-exchange-programs>

*“The purpose [...] is to give small and medium sized local government agencies employee exchange opportunities so that participants can develop new experiences, competencies and relationships.”*

Management Talent Exchange Program – Building leaders. Building organizational capacity. (n.d.). Retrieved November 8, 2017, from <http://discovermtep.org/>

*“It's far more effective to pair classroom training with real-life exposure to a variety of jobs and bosses—using techniques like job rotation, special assignments [...], and ‘action learning,’ which pulls together a group of high-potential employees to study and make recommendations on a pressing topic”*

Conger, Jay A., and Robert M. Fulmer. “Developing Your Leadership Pipeline.” *Harvard Business Review*, December 2003, <http://hbr.org/2003/12/developing-your-leadership-pipeline>

## Caveats, references, and feedback

Still unsure about some important details? Want to hear from others who have implemented similar programs? Looking for additional materials? While similar programs have been successfully implemented in some agencies, this program is new to the Consortium in 2017. Participation and feedback will help improve the program and answer some of these questions for future participating agencies. Please send feedback to any of the steering committee members [listed on the Consortium's web page](#) to help shape next year's iteration!



## Helpful contacts

Name	Agency	Title	Email
Shawna Maltbie	City of Daly City	Director of Human Resources	<a href="mailto:smaltbie@dalycity.org">smaltbie@dalycity.org</a>
Maria Saguisag-Sid	City of Brisbane	Principal Analyst	<a href="mailto:mcssid@ci.brisbane.ca.us">mcssid@ci.brisbane.ca.us</a>
Lenka Diaz	City of Menlo Park	Human Resources Manager	<a href="mailto:lddiaz@menlopark.org">lddiaz@menlopark.org</a>
Dan Jacobson	City of Menlo Park	Interim Finance and Budget Manager	<a href="mailto:dcjacobson@menlopark.org">dcjacobson@menlopark.org</a>

## Other resources

[Public Sector Leadership Academy brochure](#) – curriculum and instructors for the Public Sector Leadership Academy

### [Microsoft Office – Gantt project planner](#)

“Gantt project planner.” *Office Templates*, 14 May 2017, <http://templates.office.com/en-us/Gantt-project-planner-TM02887601>.

[Google Forms](#) – Easy to use digital forms to solicit project ideas, organizational interest, updates and more