Union Sanitary District

- $304.33 annual fee per home— one of the lowest in the SF Bay Area
- Award Winning Operations

- Started 1918
- 328,000 Customers
- 130 Employees
- 25 million gallons of waste water treated each day
Employee Growth & Development

- Part of the Strategic Plan
- Objective: Maintain a highly competent, flexible workforce
- Initiatives:
  - Competency-based training program
  - Leadership School
The Need:

• Shortfall in developing utility management skills of future leaders
• Drain of institutional knowledge will affect Bay Area utilities ability to manage their organizations
  • Retirements of Baby Boomers
  • Lack of supervisory and general utility management skills in organizations in the Bay Area.
• Our immediate concern: The retirement of two treatment plant Supervisors in the next eighteen months.
Program Development

- Research
- Management Support
- Focus Groups
- Budget
- Training for Mentors
The Leadership School Program consists of three components.

1. Completion of Ohlone College on-line coursework
2. Attendance at in-house courses
3. Participation in a Mentoring Program & Project
Ohlone College coursework:

- Mandatory courses through Ohlone College On-line Business Supervision program
  - Fundamentals of Supervision, Management of Human Resources, Leadership in Organizations.
- Completion of 1 additional Ohlone course
- Final grade of C or above
- Course work done on own time
- Registration fees/books reimbursed through USD Employee Education Policy
Online Classes

- Increased flexibility
- Online check-in two times per week
- Blog discussion requirements
- Written assignments
In-house courses:

- Concurrent enrollment in an Ohlone class
- Topics presented by USD staff
- Approx. 14 half-day sessions over 12-18 months
- Provide additional information to complement class work and provide opportunity to discuss what’s learned
- Focus on public sector and USD-specific policies and processes.
- Students must demonstrate satisfactory attendance & performance
Internal Course Subjects

- Transitioning to a Supervisor
- Leadership
- Team Development
- Communication
- Employee Relations
- Recruitment and Selection
- Employee Performance Management
- Safety/Workers’ Compensation
- Strategic Planning and Performance Measurement
- Budgeting and Procurement
- Customer Satisfaction
- Time Management and Organization
- Facilitation and Problem-solving
- Change Management
Mentoring Program:

• Executive Team members are mentors
• Training was provided by a consultant
• Mentors will provide:
  ▫ Orientation to the role of Supervisor at USD
  ▫ Leadership and management development
  ▫ Introduction to USD organizational systems and culture
Mentors will:

- Foster and sustain a productive relationship
- Maintain confidentiality
- Be accessible
- Listen actively; ask questions; make observations
- Promote responsible decision-making
- Act as a role model
- Motivate and support the mentee to achieve his/her goals
Participants come from all parts of the organization.

<table>
<thead>
<tr>
<th>Participants</th>
<th>Mentors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Principal Engineer</td>
<td>General Manager</td>
</tr>
<tr>
<td>Associate Engineer</td>
<td>Collection Services Manager</td>
</tr>
<tr>
<td>Planner/Scheduler</td>
<td>CIP/Customer Services/EC Manager</td>
</tr>
<tr>
<td>Chemist</td>
<td>Administrative Services Manager</td>
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<tr>
<td>IS Administrator</td>
<td>Treatment Plant Manager</td>
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<td>Plant Supervisor</td>
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<tr>
<td>Storekeeper</td>
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<tr>
<td>Accounting Specialist</td>
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</tbody>
</table>
Selection Process

• Submit a Written application:
  ▫ Why do you want to participate in the program?
  ▫ How you have demonstrated leadership skills?
• Commit to completing the program within 24 months
• Provide a letter of recommendation from a USD management or staff person
• Selection Panel: ET member, Supervisor, HR rep, Union rep
Minimum qualifications:

- Passed probation in their current USD position
- One year of experience in a journey-level or higher position (could be outside USD)
- Demonstration of leadership skills on the job
- Satisfactory job performance
Selection Process

- 13 Applicants
- Panel reviewed the applications and made a recommendation for participation to the GM.
- 8 employees were selected
- We wanted the group to be the right size for robust conversation and collaboration.
Mentees developed goals to work on with their Mentors.

- Goals are focused on professional development and behavior changes.
- Mentees also developed action plans and a method of measuring whether they’ve met their goal.
- Mentees apply what they learn in their area(s) of influence:
  - Supervisor
  - Project Manager
  - Union Leader
  - Team Leader
  - Committees/Taskforce Leader
Operational Considerations (aka: the small print):

- Management can limit participation based on resources and operational needs.
- Scheduling of in-house courses is subject to change based on operational needs.
- The program can be changed by management at any time.
- Management will evaluate the costs and benefits of the program after the first series is completed.
- Participation in the program does not constitute a promise of promotion.
## Return on Investment

<table>
<thead>
<tr>
<th>Components:</th>
<th>Assumptions</th>
<th>Cost per Participant</th>
<th>Cost for 8 participants</th>
</tr>
</thead>
</table>
| 6 month mentor relationship          | Twice monthly meetings for 6 months, for 60 minutes, with mentor, on District time.  
                                        | 12 hours x 8 employee @ $40/h  
                                        | 12 hours x 4 WGM @ $80/h | $1440                  | $11,520                 |
| USD in-house training                | 14, 3 hour sessions  
                                        | Prep =9 hrs (6 prep, 3 teaching)@$60/h  
                                        | Participation=3hrs @$40  
                                        | $1,500 /class  
                                        | 8 employee participants  
                                        | Prep costs will go down after first series. | $2625                  | $21,000                 |
| Ohlone on-line BS certificate program | 5 courses over 18 months @ $120/class  
                                        | 8 employee participants | $600                  | $4,800                  |

**Totals**:  
$4665  
$37,320
Return on Investment

Expected Benefits:

• Expanded leadership capabilities
• More productive new Supervisor (sooner)
• Reduced risk and cost of performance problems, disciplinary actions, grievances, arbitrations, etc.
• Reduced risk of regulatory and legal violations
• Reduced training cost for future Supervisor positions when filled by participants.
• Reduced turnover of high performers
Return on Investment

Evaluation:
- Track time involved in program
- Post-training surveys
- Interviews with participants and managers (Antidotal measurement)
- Future: # of participants promoted to management
Progress so far:

- Mentors/Mentees began meeting in May
- Presented 3 in-house courses before taking a summer break
- All participants completed one Ohlone course and are registered for another in the Fall
Q & A