



2013 Annual Awards Entry Form
(Complete one for each entry.)

Entry Name WCDA Succession Planning & Professional Development Process

Fill out the entry name *exactly* as you want it listed in the awards program.

HFA Wyoming Community Development Authority

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Entry form with description, check(s), and visual aids (optional) must be received by NCSHA by **Monday, July 1, 2013**.

Use this header on the upper right corner of each page.

HFA Wyoming Community Development Authority

Entry Name WCDA Succession Planning & Professional Development Process

Communications	Homeownership	Legislative Advocacy	Management Innovation
<input type="checkbox"/> Annual Report <input type="checkbox"/> Promotional Materials and Newsletters <input type="checkbox"/> Creative Media	<input type="checkbox"/> Empowering New Buyers <input type="checkbox"/> Home Improvement and Rehabilitation <input type="checkbox"/> Encouraging New Production	<input type="checkbox"/> Federal Advocacy <input type="checkbox"/> State Advocacy	<input type="checkbox"/> Financial <input checked="" type="checkbox"/> Human Resources <input type="checkbox"/> Operations <input type="checkbox"/> Technology
Rental Housing	Special Needs Housing	Special Achievement	Are you providing visual aids?
<input type="checkbox"/> Multifamily Management <input type="checkbox"/> Preservation and Rehabilitation <input type="checkbox"/> Encouraging New Production	<input type="checkbox"/> Combating Homelessness <input type="checkbox"/> Housing for Persons with Special Needs	<input type="checkbox"/> Special Achievement	<input checked="" type="checkbox"/> YES <input type="checkbox"/> NO

**Wyoming Community Development Authority
Succession Planning & Professional Development Process
NCSHA Management Innovation Award Entry 2013**

Category: Management Innovation

Subcategory: Human Resources

Entry Name: WCDA Succession Planning & Professional Development Process

For over 35 years, the Wyoming Community Development Authority (WCDA) has financed affordable housing for the citizens of Wyoming. For the majority of those years, WCDA operated with a relatively small staff. The loyalty at WCDA is obvious when you look at the extensive longevity of many of the employees. Over one-third of the current employees are eligible to retire within the next five years. In addition, key employees could potentially leave the Authority through recruitment efforts or other turnover. These separations pose serious risks to the Authority. The risks are more than just the loss of a full-time employee. The institutions knowledge and experience that these long-term employees possess are very important to capture. Without a plan in place for cross training, the history and extensive knowledge walks out the door.

In response to this managerial challenge, the Board and the Director of Human Resources began looking at the potential risk the Authority would face with the retirement and/or turnover of its dedicated employees. Consequently, the Executive Management team and Human Resources Department began to actively pursue a succession planning strategy that strengthened the operations of the Authority and achievement of Strategic Plan objectives through various methods. As a result, WCDA's Strategic Plans over the past three years have included Succession Planning as a priority.

The final Succession Plan established measurable goals, including improving cross training and job shadowing efforts for the Authority. Initially, four phases were developed as components of the Succession Plan. These phases include goals that identify key positions within the Authority, involve management in core function analyses, establish professional development plans for ALL employees, and conclude with monitoring and evaluation of the plan. Action steps to organize the Succession Planning efforts were also incorporated.

Succession Planning phases include:

Phase 1: Identify Key/Critical Positions

- Organizational structure - the position is a key contributor in achieving the organization's mission
- Key task - the position performs a critical task that would stop or hinder vital functions from being performed if it were left vacant
- Specialized leadership - the position requires specialized or unique expertise and skill sets that are difficult to replace
- Potential high turnover job classes - positions in the same job class or occupational group in danger of "knowledge drain" due to retirements or high turnover

Phase 2: Conduct Position and Core Function Analyses

Once key/critical positions and core functions have been identified, the next step is to identify specific skill sets that will be needed by each of the positions through the identification of key competencies. These will serve as the framework in determining existing bench strength within the organizations.

Ask the following questions:

- Why is this position/function key/critical?
- What are the external and internal factors affecting this position/function?
- How will the position/function be used in the future?
- What competencies or skill sets will be required?

- What are our current strengths?
- What are the gaps - competencies/skill sets not possessed by the current staff?
- What strategies will be used to address the gaps?

Phase 2 will be completed using the most critical key positions eligible for retirement ranking in the A, B, or C categories. The employee with status A, B, or C, their supervisor, and the Director of HR, will together complete a Key Position Analysis form.

Once all have been completed, the Director of HR will compile the data and report back to the Succession Planning team. At that time, the Succession Planning team may add items necessary to the key position. An employee pool will be developed based on experience, skills, and professional development as addressed in Phase 3.

★Phase 3: Develop Professional Development Plans - Begin Cross-Training/Job Shadowing

Professional Development is a combination of Phases 1 and 2. This is where the reviews of the individual positions and core functions are rolled into one document and gaps and strategies are formulated at an organizational or departmental level. In this phase, the strategies to overcome the gaps are outlined to include target completion dates, responsible parties and required resources.

In conjunction with the Phases 1 and 2, annually employees receive performance evaluations where they collaborate with supervisors to incorporate professional development strategies both for their specific job duties and professional growth. At any level, employees are encouraged to participate in the Professional Development Level I, Professional Development Level II, and Professional Development III. Please see attachment for further details on each PD Level.

Phase 4: Monitor, Evaluate, Revise

Ongoing evaluation and adjustments are vital to effective Professional Development planning, as well as the Succession Plan process. Although the PD plan covers a 3-5 year period, it should be reviewed at least annually to ensure flexibility in the event of growth within the Authority. If WCDA does not regularly review its plan efforts, it runs the risk of failing to meet goals and not having the ability to rapidly respond to unanticipated changes.

★Phase 3 is a crucial component of the Succession Plan. Establishing a Professional Development plan during performance evaluations is imperative for ALL team members, and is an effective way of meeting the Succession Planning goals. Succession is not only for those retiring employees or key players, it is also coverage for all areas of the Authority in the event a team member is gone for an extended period of time or leaves WCDA permanently. ALL team members at WCDA are encouraged to participate in professional development by taking classes, trainings, workshops, webinars, participating in one of the PD Levels, or working on a college degree.

Professional Development Levels (PD Levels) were created to address gaps, as well as provide a level of motivation to the process.

PD Level I – WCDA 101: 1-2 year program

The level includes courses in MS Word, Excel, PowerPoint, Business Writing, Public Speaking, and Bonds 101. There is no requirement to apply. Interested individuals simply provide the HR Department a letter of interest. Once the team member has completed the courses required, they may proceed to PD Level II. No education or years of experience are required for this level. If they have already completed the courses through other venues, proof with a transcript or certificate satisfies the requirements.

PD Level II—WCDA Leadership Academy: 1 year program

This level is designed for those not yet manager or new managers wishing to enhance their skills. Interested team members must apply and are accepted by a panel of four, including Executive Management. If not chosen, they may apply again. Requirements for Level II include an Associate degree with experience, a Bachelor degree with no experience, or at the least a combination of education and experience preapproved by executive management. Length of employment at WCDA will be considered exclusively.

The Leadership Academy is offered every other year and includes an on-site comprehensive leadership training offered by Peregrine Leadership Institute. This component develops individuals into capable leaders, synchronized with the WCDA strategic plan and operating perspectives for the Authority. Each participant is assigned a coach/mentor within the Authority, separate from their own manager that they meet with every two months during the course of the year. The coach/mentor provides a written summary of coaching sessions for the training file to HR. Additionally, participants are encouraged to cross train and job shadow others at WCDA to learn the inner workings of the entire organization. Another requirement of PD Level II is that the participants must develop an Authority-wide project to address agency operations. In 2012, the participants conducted a Values-based Cultural Awareness Initiative to introduce and encourage living the WCDA values. Finally, PD Level II requires that participants attend other professional development trainings that are specific to their jobs, as well as NCSHA trainings such as the Notre Dame Executive Leadership Institute.

PD Level III—Supervisor Bootcamp: 1-3 year program

This level is recommended for all current managers. No application is required, rather a letter of interest provided to the HR department. Participants must review and understand WCDA Policies and Procedures as they pertain to management responsibilities, complete courses in Business Writing and Coaching, as well as the Complete Supervisor Program Certificate from Mountain States Employers Council. Another component of PD Level III is that the managers encourage and live the WCDA values as stated in the Strategic Plan. Finally, this level requires that participants attend other professional development trainings that are specific to their jobs, as well as NCSHA trainings.

The WCDA Succession Plan has proven a successful response to managerial challenges. Measureable improvements and outcomes include:

- The implementation of job shadowing
- Cross training throughout the Authority
- The development of written procedures for each job and department
- Successful completion of professional development plans

These are ongoing efforts that drive the Succession and Professional Development Plans. The cost of the trainings do impact the Human Resources annual budget. Nevertheless, the benefits of Succession Planning and better prepared team members outweigh those costs demonstrating an effective use of Authority resources. The success of the plans and achievement of strategic goals and objectives are illustrated by positive responses on the annual Employee Satisfaction Survey providing measureable results.

Attachments:

WCDA Succession Plan
WCDA Professional Development Levels
Values-based Cultural Awareness Initiative



SUCCESSION PLANNING

Professional Development Process

Succession Planning involves management and supervisory positions and roles. There are four (4) phases recommended to the WCDA Succession Planning Process

- Phase 1: Identify Key/Critical Positions with Retirement Status
- Phase 2: Conduct Position and Core Function Analyses
- Phase 3: Develop Professional Development Plans—begin cross training/job shadow program
- Phase 4: Monitor, Evaluate, Revise

Phase 1: Identify Key/Critical Positions with Retirement Status

A position is considered key or critical if...

- Organizational structure—the position is a key contributor in achieving the organization's mission
- Key task—the position performs a critical task that would stop or hinder vital functions from being performed if it were left vacant
- Specialized Leadership—the position requires specialized or unique expertise and skill sets that is difficult to replace.
- Potential high turnover job classes—positions in the same job class or occupational group in danger of “knowledge drain” due to retirements or high turnover

Phase 2: Conduct Position and Core Function Analyses

Once key/critical positions and core functions have been identified, the next step is to identify specific skill sets that will be needed by each of the positions through the identification of key competencies. These will serve as the framework in determining existing bench strength within the organizations. Ask the following questions:

- Why is this position/function key/critical?
- What are the external and internal factors affecting this position/function?
- How will the position/function be used in the future?
- What competencies or skill sets will be required?
- What are our current strengths?
- What are the gaps—competencies/skill sets not possessed by the current staff?
- What strategies will be used to address the gaps?

Phase 2 will be completed using the most critical key positions and individuals (see page 5) ranking in the A, B, or C categories. The employee with status A, B, or C, their supervisor, and the Director of HR, will together complete a Key Position Analysis form.

Once all have been completed, the Director of HR will compile the data and report back to the PD Team. At that time, the PD team may add items necessary to the key position.

Phase 3: Develop Professional Development Plans—Begin Cross-Training

Professional Development is a combination of Phases 1 and 2. This is where the reviews of the individual positions and core functions are rolled into one document and gaps and strategies are formulated at an organizational or departmental level. In this phase, the strategies to overcome the gaps are outlined to include target completion dates, responsible parties and required resources. See *Professional Development Status Worksheet* and *Talent/Acceleration Pool Applicant Profile* below.

Phase 4: Monitor, Evaluate, Revise

Ongoing evaluation and adjustments are vital to effective Professional Development planning. Although the Succession Plan covers a 3-5 year period, it should be reviewed at least annually to ensure flexibility in the event of growth within the Authority. If WCDA does not regularly review its plan efforts, it runs the risk of failing to meet goals and not having the ability to rapidly respond to unanticipated changes.

STEP 1: Organize Professional Development Planning Efforts

- Gain Executive Management support
- Establish a Professional Development Planning Team
- Conduct a kick-off meeting with the Professional Development Planning Team
- Develop a Professional Development Plan

STEP 2: Identify and Prioritize Professional Development Problems/Issues

- Establish a definition for key/critical and hard-to-fill positions
- Identify retirement status of positions
- Identify and group key/critical and hard-to-recruit positions together (see page 4)
- Conduct a risk analysis and identify high risk areas to address initially

STEP 3: Identify Critical Competencies for Key/Hard-to-Recruit Positions and Core Functions

- Gather competency information from supervisor, employee, job description, and HR
- Identify critical competencies
- Define competencies and identify behaviors that demonstrate them
- Compile information for all key positions, report to Succession Team

STEP 4: Identify and Evaluate Applicant Pools

- Identify applicant pools
- Collection info on competency levels of employees in applicant pools
- Identify competency gaps

STEP 5: Identify and Implement Strategies and Programs for Professional Development and Cross Training

- Develop recruitment plans and temporary strategies for getting work done during vacancy periods
- For each competency gap, identify strategies and programs to increase competency level of employees in applicant pools—professional development plans
- Establish metrics and targets for developing applicant pools
- Communicate opportunities to managers and employees

STEP 6: Evaluate the Program

- Review progress towards reaching goals and targets, adjust problems and strategies if necessary

IDENTIFIED KEY POSITIONS AND CORE FUNCTIONS

CORE FUNCTIONS

- *Accounting
- *Information Systems
- *Servicing → Construction, REO
- *Compliance in Federal Programs Department

KEY POSITIONS—3 levels

LEVEL 1: VITAL—Hard to Recruit

- *Executive Director
- *Deputy Executive Director
- *Director of Finance/Administration

LEVEL 2: MID—VITAL

- *All Director positions and Controller
(Director of MIS & Facilities; Director of Federal Programs; Director of Office Administration; Director of Human Resources; Director of Single Family Programs; Director of Mortgage Loan Servicing)

LEVEL 3: BENEFICIAL

- *Construction Manager
- *REO Manager
- *Collections Manager
- *Loan Review Manager
- *Communications Manager

ROLES & RESPONSIBILITIES

Succession Plan Team

- 1) Team owns process and plan
- 2) Select key positions
- 3) Establish communication strategy—what will be said to who?
- 4) Determine time line for plans (date we hope to have plan in place & begin)
- 5) Review internal candidates pool – should include ALL employees initially
- 6) Establish a budget for staff development (HR Budget & departmental Budgets)
- 7) Review and update plan regularly

Individual Managers

- 1) Determine knowledge, skills, abilities, emotional intelligence, etc. needed for key positions
- 2) Identify potential internal candidates for key positions—CROSS TRAINING
- 3) Assess risk of vacancy in each key position (quits, terminations, re-organization of roles, retirements, other)
- 4) Determine skill gaps among internal candidates
- 5) Communicate with employees to educate about plan and assess career goals
- 6) Manage communication issues

Process Steps: Identify and Select High-Potential Employees

The *Professional Development Status Worksheet* (see above page 5) illustrates positions that should receive the highest priority in the planning strategy. However, limiting the strategy to only select positions would limit the number of potential leaders targeted to receive leadership developmental opportunities, and who could fill leadership vacancies.

WCDA should develop a talent/acceleration pool of high-potential employees to receive enhanced developmental experiences. By using a talent/acceleration pool, WCDA can increase the number of employees who will be prepared to step into higher-level jobs.

Choose a Succession Team that will need to exercise care in developing a plan for selecting high-potential employees for the pool. This team should consider the following when identifying high-potential employees:

- WCDA will be expending significant resources on the enhanced development of those in the talent/acceleration pool – it is important to include only those who have real potential for leadership positions.
- It is equally important to develop a process that ensures that every employee with the skills and leadership potential are fairly and thoroughly considered for participation.
- WCDA will want to ensure that the selection process results in a diverse group of employees to include in the talent/acceleration pool.

Building the WCDA Talent/Acceleration Pool

Nomination Criteria: WCDA's size, organizational structure, pay system regulations and culture will in part determine the nomination criteria to use. Employee requirements to consider include:

- Educational level/degrees
- Years with the agency
- Current or prior supervisory experience
- Classification level

It is important to remember that we are basing your criteria on the future potential of the employee, rather than their current capacity.

Use the *Talent/Acceleration Pool Applicant Profile* to help determine the type of criteria for WCDA to use to nominate employees to the Talent/Acceleration pool.

Management Nomination: A system where management-initiated nominations may include some high-potentials is to be considered. Requesting managers nominate by providing the

information on the *Talent/Acceleration Pool Applicant Profile* will provide a more complete picture of the nominee's background and capacity.

The Selection Process: An established screening process will assist nominees to the talent/acceleration pool in order to help management decide who to select. The screening process outlined below is sufficient; there are also some additional optional steps from which to choose that could be developed.

- a) **The Succession Planning Team does an initial screening:** the team or manager can use the nomination materials and the *Talent/Acceleration Pool Nomination Summary* to summarize the information from the individual nomination forms.
- b) **Management returns forms to Human Resources** to nominate employee into the applicant pool.
- c) **Employees cannot self-nominate at this time.**

HOW LEADERS DEVELOP



Assignments	<ul style="list-style-type: none">*Full job change*Job restructure based on development needs*Special projects & assignments*Temporary assignments
Feedback & Coaching	<ul style="list-style-type: none">*360 assessment feedback and evaluation*Coaching by a skilled manager*Mentoring by other employees or managers
Training	<ul style="list-style-type: none">*Motivated by self-development*Coursework*Conferences, seminars, workshops*Community Involvement

Succession Team

- 1) Team owns process and plan
- 2) Select key positions
- 3) Establish communication strategy—what will be said to who?
- 4) Determine time line for plans (date we hope to have plan in place & begin)
- 5) Review internal candidates pool – should include ALL employees at beginning
- 6) Establish a budget for staff development (HR Budget & Departmental Budgets)

COMMUNICATION STRATEGY:

- 1) **Objective:** To inform management, employees, and the Board of Directors about the purpose and objectives of the Succession Planning efforts at WCDA, and the specific contents of the Authority's plans.
- 2) **What is Succession Planning—TALKING POINTS:** This plan will ensure the Authority is able to recruit, develop and retain in-house team members and new hires to fill each key role at WCDA. Succession Planning works in conjunction with Performance Evaluations, WCDA Values, Departmental Procedures, and individual Professional Development Plans.

NOTE: Succession Planning is NOT a promise to promote, rather an avenue to develop our current team members and ensure all areas of the Authority are covered in the event of a vacancy. No member of the Authority should assume or expect participation is a guarantee of further employment or promotion. **EMPLOYMENT AT THE AUTHORITY IS AT WILL AND TERMINABLE. TERMINABLE AT WILL MEANS THAT EITHER THE AUTHORITY OR THE EMPLOYEE MAY TERMINATE THE EMPLOYMENT RELATIONSHIP AT ANY TIME, FOR ANY REASON, WITH OR WITHOUT NOTICE OR WITH OR WITHOUT CAUSE. NO PROVISION IN EMPLOYMENT POLICIES OR ANY OTHER POLICY, PRACTICE OR PROCEDURE SHALL BE INTERPRETED TO LIMIT THIS RIGHT IN ANY WAY. This includes the Succession Plan.**

- 3) **Steps to Implement Succession Planning:** The following are steps that may be or have been implemented to begin the process.
 - Phase 1: Identify Key/Critical Positions with Retirement Status
 - Phase 2: Conduct Position and Core Function Analyses
 - Phase 3: Develop Professional Development Plans—begin cross training or job shadow program, other trainings as indicated on performance evaluation
 - Phase 4: Monitor, Evaluate, Revise
- 4) **Solid Foundation to the Succession Plan:** The Authority's leaders are committed to the steps and process of the plan.
 - The Board of Directors will hold Executive management fully accountable to drive the program.
 - The Executive Director will hold management fully accountable and drive the program.
 - Senior and Mid-Level management are the champions of the plan and key to developing team members. All management will communicate the same phases, talking points, and steps throughout the process to all team members.

- Human Resources is responsible for overseeing the plan, meeting with Executive Management, and maintaining documents, as well as supporting all management and team members throughout the process.
- Employees are responsible to obtain the knowledge and understanding of the program through communications, presentations, the Link, and professional development planning with supervisors. Employees are responsible to ask questions of HR or management for clarification.

5) *How will the plan be communicated?*

The *Executive Director and Deputy Executive Director* may communicate the plan to all team members at a special Staff Meeting dedicated to Succession Planning.

The *Director of Human Resources* may ensure the Communication Plan is placed on the Link for easy access by all team members. He/she may also provide support and an open door policy for all team members to ask questions and clarify plan communications.

Management may continually communicate, develop and support team members in regards to the plan deemed necessary.

BUDGET FOR STAFF DEVELOPMENT:

✓COMPLETE—within HR budget and departmental budgets, as well as Board approved redundancy for key positions in the event a retirement is forthcoming.

QUESTIONS TO HELP ASSESS TALENT

Will this person...

- 1) Develop fast enough to keep up with the rest of the team?
- 2) Take ownership of his/her areas of development?
- 3) Think globally and as a visionary?
- 4) Be willing to consider growth of organization and individuals?

Does this person....

- 5) Have the appropriate sense of urgency?
- 6) Have enough experience to take the next job?
- 7) Have the stature of a senior executive?
- 8) Have the skills or credibility to be a senior executive?

Can this person...

- 9) Make tough people decisions that may be necessary to build the organization?
- 10) Build a team?
- 11) Make the transition from staff to a line role or from thinking to an implementation role?
- 12) Recover from a bad or slow start?
- 13) Develop a successor?
- 14) Handle the increased administrative load of this position?
- 15) Change leadership styles from tough leader to coach?
- 16) Move to a new functional area or line of business?
- 17) Develop executive perspective?

People who have potential generally....

- Are critical thinkers who examine problems carefully and make fresh connections
- Know themselves better and are able to handle tough people situations deftly
- Like to experiment and can deal with the discomfort that surrounds change
- Deliver results in first-time situations through team building and personal drive

PROFESSIONAL DEVELOPMENT LEVELS

***PLEASE NOTE:** The following programs are for all team members at WCDA and anyone interested is welcome to apply. Please see Human Resources if you have questions or concerns. Thank you and enjoy your learning journey.

PD LEVEL I—"WCDA 101"—1 year program

- 1) Level I is designed for all levels of staff and management at WCDA, if interested
- 2) No need to apply, inform Human Resources and Supervisor with a letter of interest
- 3) Complete levels Basic, Intermediate and Advanced of MS Word—each 1 day workshop
- 4) Complete levels Basic, Intermediate and Advanced of MS Excel—each 1 day workshop
- 5) Complete WCDA 101—(mortgage banking, bonds, etc.)—David Haney, ED/Instructor
- 6) Complete Business Writing course—1 day workshop
- 7) Complete Public Speaking course—1 day workshop
- 8) Complete Level I before advancing to PD Level II. *(If you have completed the above components, please provide a transcript or other explanation illustrating equivalents to HR with your application for Level II.)*
- 9) There are no education or years of experience required for Level I.

PD LEVEL II—"Leadership Academy"—1 year program

- 1) Level II is designed for those not yet managers. However, new managers are welcome to apply.
- 2) Interested employees must apply—HR will provide an application for those interested
- 3) Associate degree with experience, Bachelor degree with no experience, or combination of education and experience is a must—length of employment with WCDA will be considered
- 4) Executive Director, Deputy Executive Director and Director of HR will review and approve applicants—utilize Applicant Analysis form
- 5) Will have one class every other year—if not chosen, welcome to apply again
- 6) Complete PD Level I or approval of supervisor and HR
- 7) Complete Peregrine Leadership Academy specific to WCDA (on site, may require some local travel—HR will budget for amt)
- 8) Meet with assigned Coach/Mentor at least quarterly, document meetings, provide copies to HR for training file. Coaches will be assigned and subject to Executive Director approval.
- 9) Cross train on key position duties with coach/mentor—document duties acquired, provide copies to HR for training file
- 10) Work with other WCDA Leadership Academy participants on an Authority-Wide project (ex. Values Campaign 2012-2013)
- 11) Integrate personal professional development plans from annual performance evaluations

EXAMPLES:

- a. Notre Dame
- b. Wyoming Business Leadership Institute
- c. Mountain States Employers Council courses, leadership trainings
- d. Dale Carnegie
- e. NCSHA/NAHRO/HUD/etc...
- f. Higher education degree pursuit at accredited institution
- g. Job specific trainings—NCSHA, NAHRO, NeighborWorks, etc....

PD LEVEL III—“Supervisor Bootcamp”—1-2 year program

- 1) Not mandatory, but recommended for all current managers. No application, submit letter of interest to HR and supervisor.
- 2) Review and understand WCDA Employment Policies and Procedures
- 3) Complete *Business Writing* class for managers – Mountain States Employers Council (MSEC)
- 4) Complete the “*Coaching: Partnering for Performance*” course from MSEC
- 5) Complete the “*Complete Supervisor Program*” *Certificate* from Mountain States Employers Council (MSEC) -- Pg. 73 of MSEC Training Catalog—this is a week long course in Denver or Fort Collins, Colorado. Certificate courses include:
 - a. *Supervision—Core Competencies*
 - b. *Interviewing and Hiring I*
 - c. *Legal Issues in Managing Employees*
 - d. *Performance Management: Setting the Stage for Success*
- 6) Understand the importance of Professional Development for subordinates
- 7) Ability to communicate and live the WCDA Cultural Values
- 8) Integrate personal professional development plans from annual performance evaluations
 - a. Trainings each manager prefers to attend—NCSHA, NeighborWorks, NAHRO, etc.
 - b. Job specific training

WCDA Leadership Academy Value-based Cultural Awareness Initiative

Several members of the WCDA staff recently began working with Peregrine Institute, on behalf of WCDA, to develop and strengthen leadership qualities and skills. During the initial meeting, the group defined leadership and talked about the 7 key leadership values and attributes. During these discussions the group was asked to think about the Authority's values and where the 7 key values fit in with WCDA culture. Upon initial conversations, several were unable to list out the Authority values which led to the following opportunity.

The vision of the initiative is to elevate awareness of the established WCDA cultural values in order to better support each other and serve our customers.

How will the WCDA Leadership Academy achieve the vision?

Kick-off

The Value-based Cultural Awareness Initiative Kick-off will be delivered at the February staff meeting (February 20th) as a collaborative effort by WCDA Leadership Academy and the Management team. The WCDA Leadership Academy will be given 10-20 minutes to announce the campaign, its vision, and the implementation process. The goal at the kick-off is to build enthusiasm and momentum for the initiative.

During the kick-off each WCDA team member will receive a pocket version of the values poster, an 8.5x11 version for their desk area, and a Values branded drink coaster. The group will ask for input from staff on how the selected value is exemplified in the workplace. Over the next month (until the following staff meeting) WCDA staff will be encouraged to share/discuss examples of the selected value.

Looking for feedback - "How else do you suggest we best promote & develop awareness of our existing values."

Post Kick-off Execution

- The campaign will target each WCDA value for an entire month, starting at the February kick-off
- Prior to announcing the featured value to staff, the group will present the value and the actions for that month at the monthly Management Meeting (i.e. the group will present the starting value during the February 18th Management Meeting).
- During each month, the group will announce the featured value at the staff meeting and summarize the stories collected over the prior month from the previous value.
- The group will publish stories in the monthly newsletter and provide tools on how to acknowledge the current value.
- The stories, examples, tools/tips can be added to The Link and included in the newsletter.

- Throughout the month, the group will follow-up with other WCDA peers to answer any questions about that value and collect examples for future communications working toward open lines of communications across all levels of staff & management.
- To create active participation, the group will encourage all WCDA team members to highlight the selected value in their email signature line.

The above examples are simply a starting point for the WCDA Leadership Academy group. During each monthly meeting they will discuss the need to add to the action plan and/or drop an item. Some suggestions may not be applicable for every value but the group will work closely with the Management Team to discuss any foreseeable changes.

The WCDA Leadership Academy group deems this to be a necessary initiative for the growth of the organization and would like to accept this initiative as a group project.