1. **Cover Sheet Information:**

**Case Study Title:** Innovative Leaders Institute: Nurturing Emerging Leaders

**Case Study Category:** Organizational Design

**Jurisdiction Name:** County of Albemarle, Virginia

**City/County Manager Name**: Thomas Foley, County Executive

**Would you like the application to be considered for an Innovation Award?** Yes

**Would you like the application to be considered for our Rapid Fire Session**? Yes

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**B. Synopsis**

Like many other local governments, Albemarle County is anticipating a “retirement tsunami” in the near future and is looking at the potential loss of long-time senior leadership and significant institutional knowledge. The average age of County employees is 45 and the average age of County department heads is 54. Currently about 28% of our employees are eligible for full or reduced retirement benefits; by June 2014, that percentage is expected to rise to 35.5%. At the same time, particularly difficult budget times have required our employees to think and act more innovatively than ever, develop a stronger sense of “ownership of the whole” rather than working in departmental silos, and to embrace best practices and use of performance indicators. Creating the “Innovative Leaders Institute” (ILI) allowed our organization to stay focused on our values of innovation and learning at a time when funding for professional development has been very limited. It also provided structure and support to build organizational leadership capacity and retain high-potential employees, position the organization as forward looking and focused on excellence as we respond to our new budget reality, and support SPQA and high-performing organization values. For these reasons, we believe the ILI is a building block to creating and sustaining a “Cool Community.”

The ILI is an innovative solution to developing leadership capacity that is focused specifically on thinking innovatively and gaining an organizational perspective. We have also partnered with the City of Charlottesville and its “Charlottesville Leadership Development Academy” (CLDA—somewhat similar in nature to ILI) to hold joint ILI/CLDA events to foster intergovernmental innovation as well. We kept costs to a minimum by relying on in-house expertise to develop and deliver the curriculum components. We believe that our model can be easily replicated by other local governments.

Staff from the County Executive’s Office and Human Resources collaboratively developed the ILI by assessing our own organizational culture and needs, talking with senior leaders, and drawing from best practices of similar local government programs. The ILI required no additional staffing and only modest funding (less than $500 annually for supplies such as books and a few lunches). The program required no private consultants.

Our first cohort of about 15 participants participated in ILI 2011. Our second cohort, made up of about 18 participants, is currently participating in ILI 2012. To recruit these participants, we asked department heads to nominate an employee from each of our 14 local government departments, allowing two nominees from our three largest departments The second year we revised our process to require participants to fill out an application, allowing us to get a better sense of who was interested in the ILI program. We asked departments to target high-performing employees with a track record of embracing innovation as well as demonstrated leadership potential. Selected participants represented folks ranging from management analyst up to and including assistant directors.

ILI has two components: classroom work and outside work.

Classroom Work

ILI participants met six times (once a month, over a 6-month period) for 2-hr long sessions, which were moderated by CEO/HR staff. The fluid curriculum changed based on participant feedback as well as organizational priorities. Topics past and present include broad leadership themes (such as innovation, performance measurement, benchmarking, change management, and presentation skills) as well as organizational issues (such as understanding the County’s budget process, the role of the County’s elected officials, and inter-governmental relationships). Mixing both theory and practice, participants examined these themes both through discussion of assigned reading and by listening to senior leaders in the organizational speak on their experience with the topic. The classroom sessions also included a local current events pop quiz and designated networking time—both served to nudge participants out of departmental silos into the knowledge- and relationship-building that is key to an organization committed to excellence.

Outside Work

The outside work consisted of the following components:

1. *Shadowing assignments*

We required participants to shadow (for a minimum of four hours each) a fellow ILI participant and also someone external to the County. The internal shadowing assignment is determined by CEO/HR staff, and is designed to give participants the opportunity to spend some time in another department. The external match is up to the participant—we’ve had participants shadow folks from neighboring jurisdictions, from our own School division, from state government, and from private-sector partners. We encourage them to shadow someone from whom they can learn something meaningful.

1. *Required reading*

Participants are required to read a book and several articles over the course of the ILI.

1. *Attendance at a Board of Supervisors meeting*

A majority of our employees have never attended a meeting of our elected officials—this requirement gives our ILI folks exposure to the realm of elected officials and their decision-making functions to develop a broader organizational perspective.

1. *Capstone project*

This is the cornerstone of the ILI program, giving participants a hands-on leadership opportunity on an important organizational issue. Like the overall ILI curriculum, capstone project assignments have evolved over time as organizational needs and resources have shifted.

The capstone projects for ILI 2011 came out of a timely discussion with the County’s Leadership Council (LC), which consists of County Executive senior staff and department heads. This discussion identified several areas for organizational improvement where more study was needed. Each ILI participant served on a team (made up of 3-5 ILI participants) assigned to study one of those topics and then present findings and actionable next steps to the LC at the end of the ILI. We included several “check-in” points to allow teams to run their findings/presentation by a sub-group of the LC for early feedback as well.

2012 ILI capstone projects are currently underway. Since late 2011 and early 2012 found the County very engaged in strategic planning, it was most appropriate to tie the capstone projects directly to the County’s preparations to launch its FY13-17 Strategic Plan on July 1. ILI participants were assigned to existing cross-departmental Strategic Plan goal teams and instructed to attend meetings (to observe, learn, and contribute as possible) and then to create a deliverable (curated photo narrative) for presentation to the LC and to respective departmental staff meetings in July.

To engage our LC members and to afford ILI participants the opportunity to get to know and learn from these more experienced leaders, we had volunteer LC members serve as mentors to the smaller capstone teams within each ILI group. We also encouraged participants to share their learning experience with their managers—in the future, we hope to engage those managers in a more intentional manner.

As with most endeavors of this nature, it is critical to keep this momentum going. To do this, we started an alumni group that meets quarterly. So far, the group has met to get an “insider’s scoop” on the current budget process as well as holding a networking “mashup” with the City’s CLDA to discuss fostering regional innovation. In the future, we hope to incorporate community service and roundtable discussions into these events. To further encourage relationships and knowledge-sharing between ILI cohorts, we had several 2011 alumni present during ILI 2012 classroom sessions.

***Program Results***

From almost all accounts, the ILI was deemed a great success. As one way to assess the impact of 2011 ILI, we asked participants and their respective managers to complete pre- and post-ILI assessment surveys. The results of those surveys suggested that as a result of the ILI, both managers and participants believe that participants are now better able to understand significant organizational issues facing other departments, to understand how other departments proactively engage County citizens, to understand how the County’s budget is developed, to look for best practices related to work on a regular basis and to feel comfortable presenting an idea or innovative initiative to upper management.

Leadership Council also enthusiastically endorsed the 2011 ILI work on the capstone projects and agreed to move the recommendations of all four teams forward for action. In the feedback they gave us, LC members were truly impressed by the quality of the work of the ILI participants. As another way to evaluate the program, we asked participants some open-ended questions to get a sense of how ILI had benefitted them. Select comments from ILI 2011 participants included:

* *“[Attending the Board of Supervisors meeting] was a good learning experience to observe the process in action.”*
* *“I really enjoyed the peer shadowing…it opened up a dialog in how we can work together as departments in delivering great services to customers.”*
* *“I have never really thought of myself as a leader, so this experience has made me look at myself differently.”*
* *“I think this class has guided me into thinking of the big picture more than just how things relate to my job/dept.”*
* *“I’ve learned how to present a new idea and how to help the group buy into it.”*
* *“I feel like I could collaborate with leaders from other departments whereas before I would not have known why or how to go about doing so.”*
* *“I have learned to be much more open minded, especially to new ideas and concepts. As a long-term employee, you sometimes get comfortable and set in your ways, because you rely on your experiences.”*

Select statements from department heads:

* *“I enjoyed working with the SharePoint ILI group and seeing all the great results of their work from the initial session.  It was great to work with someone from a department other than my own who shares my passion to use technology to support a County-wide initiative.”*
* *“Staff from my department that has participated has all responded with enthusiastic support of the program.  Despite the fact that it added to their workload for that period of time, they have all found it to be an invaluable opportunity for them professionally.”*

Based on mid-ILI 2012 feedback forms, the current cohort is also finding great value in the program:

* *“Internal job shadowing was an eye opener.”*
* *“Great networking of people and ideas.”*
* *“Valuable to meet other County employees.”*
* *“It has been eye-opening as far as things and projects that are going on in the County that I otherwise wouldn’t be aware of.”*

**Outcomes – cost savings, for citizens, any performance measures information, etc.**

* Training and leadership development opportunities are provided at a savings to taxpayers
* Strategic succession management is assured resulting in seamless transition of new leadership into key management positions
* New leaders come into critical positions with awareness of the County’s strategic plan, a holistic view of local government operations, and skill sets including performance management, benchmarking, ROI analysis, etc.
* We believe the ILI has significantly strengthened our organization, ultimately leading to more efficient and effective delivery of services to our community.

**Obstacles**

* Required significant staff time during a time when workforce down by almost 10%
* Some large departments had many folks interested; some small departments had few folks interested

1. **Presentation Style**

We would envision starting the presentation with a brief video introduction from ILI attendees across our organization to give a quick flavor of what the program is all about. We would then plan to give a program overview via slides and engage the group in a learning situation that would simulate one of the exercises in our class, i.e. networking or an innovation exercise. As a take away, we would have a team exercise which would help each attendee identify the first steps in envisioning how an ILI might work in their organization, perhaps partnering them with a mentor from our program via an email relationship that could continue after the session.