

**Leadership School and Succession Planning at Union Sanitary District  
Presentation to San Francisco Water Power Sewer  
October 23, 2012**

**LEADERSHIP SCHOOL**

- Recognizing the Gap:
  - Address future retirements
  - Develop non-technical skills critical for success
- Needs Assessment:
  - Gathered input from managers, coaches and potential participants
  - Incorporate opportunities to practice skills
  - Develop skills that benefit the District now and in the future
- Program Development:
  - Operations Coach, Human Resources Administrator, Quality Program Coordinator
  - Researched other programs and curriculum
  - Found external curriculum and developed internal curriculum consistent with USD's culture
- Engaging Upper Management:
  - Solicited input into curriculum
  - GM involved in participant selection
  - Executives acted as mentors after receiving training
- Selection Process
  - Application process included an essay, letter of recommendation, and a commitment to complete the the program
  - Panel reviewed application and made recommendations to the General Manager, who made the final decision

- Program Structure
  - Community College courses
  - 15 in-house workshops
  - Mentoring
- Second Session
  - Approved by USD management
  - Will begin January 2012

## **MANAGEMENT SUCCESSION PLANNING**

- Four of the six top managers will retire in the next 15-24 months; other management staff will also be retiring in similar timeframe
- Deputy General Manager created for next 18-24 months; intended to become GM
- Deputy GM will be on the Executive Team, participating in planning activities and selection of key management staff
- Six employees identified as potential replacements for two of the top management staff
- Outside consultant selected to administer 360-degree feedback process
- Consultant debriefed 360-degree assessment
- Consultant will provide ongoing coaching to internal employees
- Consultant will conduct two full-day workshops:
  - Leadership in the 21<sup>st</sup> Century: participative management, leading employees and building collaborative relationship
  - Decision-making