"Building Awesome Talent" -- webinar

2:00 – 3:00 p.m. PT, Wednesday, September 30, 2009

Cal-ICMA and CSMFO Coaching Programs have cosponsored this webinar for all employees.

*** Advance registration required for this no-charge webinar: https://www1.gotomeeting.com/register/295527560

Panel Topics:
1. What are the talent challenges that local governments face?
2. What approaches have proven effective in building talent?
3. How do these efforts engage employees to advance in their careers?
4. What resources are available to help agencies address these issues?

Panelists:
- Joni Pattillo, City manager, Dublin
- Donna Pontau, Legacy Livermore Program Manager, Livermore
- Ken Striplin, Asst. City Manager, Santa Clarita
- Don Maruska, Director, Cal-ICMA and CSMFO Coaching Programs

Post-Webinar Group Discussions

Many agencies are organizing groups to listen to the calls (live or recorded) and discuss the topics among themselves after the calls. Some are summarizing their discussions and distributing them to managers throughout their organizations. Use the Cal-ICMA and CSMFO Coaching Programs as effective ways to enhance professional development in your agency. Here are some discussion starters for this session.

1. What particular talent challenges does our agency face?
2. What’s working for us already?
3. Which tools or techniques would we like to pursue to enhance our success?
4. How can we engage our employees to move forward successfully?

Panel Call Etiquette

* Please put your phone on mute, except when you are asking a question or making a statement.
* Do not put the call on hold, especially if you have music or a message that plays and will disrupt other callers.
* Kindly disable call waiting or other phone features that will interrupt your participation in (and others listening to) the call.
There is no charge to participate in the webinar, but callers will bear the costs charged by their carriers to reach the conference number. Alternatively, you can listen via live audio on the web [powered by Granicus] at the "Live Audio and Archives" tab of www.cal-icma.org/coaching or www.csmfo.org/coaching

MORE RESOURCES--See the "Coaching Corner" at www.cal-icma.org/coaching or www.csmfo.org/coaching for valuable resources to boost your career.

Enjoy the resources and support to thrive in local government.

Don Maruska, Master Certified Coach
Director, Cal-ICMA and CSMFO Coaching Programs
See "Coaching Corner" at www.cal-icma.org/coaching and www.csmfo.org/coaching
City of Santa Clarita
COMPETENCY-BASED EMPLOYEE DEVELOPMENT

REVIEW
Job Descriptions (108) and City Philosophy

JOB FAMILIES (20)
Positions with similar functions and responsibility

COMPETENCIES (8)
The knowledge, skills, abilities, and behaviors that work together to produce outstanding job performance

Using Competencies to Hire, Develop, and Retain Superior Performers

Classification
- Use job descriptions to describe essential functions and requirements needed for a position
- Tie to competencies and the City’s philosophy

Recruitment and Selection
- Develop selection tools and interview questions to help assess and identify competencies in candidates
- Facilitate behavioral-based interviewing and provide the foundation for consistent interviewing

Performance Management
- Develop performance evaluations that tie to competencies and measure employees against
- Create a core common language for assessment
- Employees know what is expected

Training and Development
- Provide relevant training and development options designed to build competencies
- Use self-assessment tools to identify which competencies need developing and identify programs available to help
- Develop link between performance management & learning systems

Succession Planning
- Identify competencies needed to progress to higher level positions
- Provide alignment between business strategy and skills needed to drive organizational performance
- Prepare future leaders by further developing competencies
Exemplifies strong character and integrity
Exhibits loyalty to the City and staff
Establishes trust with co-workers, staff, and the public
Sets high standards for self and holds self accountable
Represents self and the City in a professional manner

Provides purpose and direction toward achieving City goals
Creates a sense of excitement

Resolves conflicts in a positive and constructive manner
Addresses performance problems and issues promptly
Strives for win-win solutions

Communicates clearly and concisely
Makes clear and convincing presentations
Listens and openly considers ideas and suggestions
Keeps others informed

LEADS

LEADS

Prepares Self

Develops Others

Motivates

Team Builds

Recognizes own strengths and weaknesses
Extracts learning from failure
Continually strives to expand knowledge
Understands the importance of the process which elected the Council, the importance of public service, and is committed to advancing the well-being of the community

Supports professional and personal growth
Helps people learn
Coaches, counsels, and mentors

Inspires and motivates others toward goals
Encourages initiative
Rewards people for their effort and achievements
Ensures people are treated fairly

Encourages and facilitates cooperation and trust among team members
Fosters commitment and team spirit
Manages an inclusive workplace that maximizes the talents of each person

Creates a Vision

Encourages Creativity

Makes Decisions

Gets Results

Creates effective strategies consistent with City policies, practices, and philosophy
Builds a shared vision with others
Sets clear goals and expectations

Creates a work environment that encourages creative thinking
Identifies innovative and non-bureaucratic solutions
Designs and implements innovative processes and programs

Accepts changes and adapts behavior and work processes
Encourage decision-making on the front lines
Looks for decisions that will endure the test of time and future generations will love
Makes decisions in difficult and ambiguous situations when time is critical

Translates ideas into concrete actions
Accomplishes tasks consistently

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ACHIEVES

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<thead>
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<th>Job Families</th>
<th>Competency Definitions</th>
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<td><strong>1 Communication Skills</strong></td>
<td>Communicates clearly and concisely, both verbally and in writing with individuals and groups; shares ideas, information, and feelings in a constructive and positive manner; listens to and objectively considers ideas and suggestions from others; shares relevant information openly, honestly, and in a timely fashion; keeps others informed.</td>
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<td><strong>2 Customer Service</strong></td>
<td>Quickly and effectively solves customer problems by identifying the information needed, seeking the information from appropriate sources, and using skillful questions to draw out the needed information; determines how to best satisfy the customer's request; communicates with the customer in a positive manner.</td>
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<td><strong>3 Decision Making and Problem Solving</strong></td>
<td>Tackles problems by using a logical, systematic, and sequential approach; investigates, identifies, and analyzes key issues and the associated alternatives, benefits, and costs to develop practical solutions; identifies creative, innovative, and non-hierarchical solutions; makes decisions based on knowledge, experience, analysis, team input, and judgment; willing to make decisions in difficult or ambiguous situations when time is critical.</td>
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<td><strong>4 Fiscal Management</strong></td>
<td>Develops and maintains internal controls in the oversight of the budget, grants coordination, and reconciliation of data; able to troubleshoot and work to solve fiscal problems that may emerge or be identified; able to facilitate audits.</td>
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<td><strong>5 Interpersonal Skills</strong></td>
<td>Works effectively with co-workers and the general public; builds constructive and effective relationships to achieve goals; uses diplomacy and tact; treats others with compassion and sensitivity; demonstrates a value for other people; responds appropriately to needs of different people in different situations; keeps commitments; manages conflict and disagreements in a positive and constructive manner; finding mutually acceptable and practicable solutions.</td>
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| **6 Organizational Awareness** | ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■ ■■ ■ ■ ■ ■ ■ ■ ■ ■ ■■ ■■ ■ ■ ■■ ■■ ■ ■■ ■■■ ■ ■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ■■■ ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• ••• •••
Foster Pride
Grow Relationships
Cultivate Minds
Nurture Risk-Taking

Legacy Livermore Core Employee Competencies

All Employees

• Excellence in Customer Service
• Professional and Ethical Behavior
• Collaborative Nature
• Considerate, Respectful and Caring
• Dedication to Performance
• Accountability
• Effective Communication Skills

Supervisors

• Applied Ethics
• Accountability for Commitments and Results
• Problem Solving Skills
• Clear Understanding of City Policies
• Effective Supervisory Skills
• Ability to Use and Implement Appropriate Technology

Managers

• Ability to Identify Talent, Develop and Motivate Employees
• Encourage Innovation
• Practice effective policy development and program assessment.
• Acknowledge Contributions
• Big Picture Perspective
• Effective Management Skills
• Fiscal Awareness and Responsibility
• Develop and Maintain Positive Relationships
• Understand Governmental Procedures and Processes

Executive Leaders

• Role models for the organization and community
• Actively empower and mentor others
• Visionaries
• Approachable
• Strategic thinkers and doers – ability to connect Council priorities with community needs and active participants in meeting goals and Council priorities
• Foster a collaborative, creative culture
• Decision makers
• Motivate and recognize accomplishments

11/2008
**Performance Academy Categories**

Review the possible course categories below. Select those that would assist your growth needs for your current job or career goal this year.

<table>
<thead>
<tr>
<th>ALL EMPLOYEES</th>
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<tbody>
<tr>
<td><strong>Government</strong></td>
<td><strong>General Education</strong></td>
<td><strong>Finance</strong></td>
<td><strong>Human Resources</strong></td>
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<td>Finance 101</td>
<td>Human Resources 101</td>
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<td>City Government</td>
<td>Customer Service</td>
<td>Budget &amp; Finance Fundamentals</td>
<td>Personnel Rules/Regulations</td>
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<td>City Hall Basics</td>
<td>Internal Customer Service</td>
<td>Timecards &amp; Payroll Procedures</td>
<td>HIPPA &amp; Employee</td>
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<td>City Demographics and Diversity</td>
<td>History of Livermore</td>
<td>Cashiering/ Bond &amp; Trust</td>
<td>Workplace Safety</td>
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<td>Brown Act</td>
<td>Business Writing</td>
<td>Documentation</td>
<td>Workplace Violence Prevention</td>
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<td>Public Records Act</td>
<td>Communication Skills</td>
<td>Purchasing Procedures</td>
<td>Harassment Prevention</td>
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<td>Council Priorities</td>
<td>Time Management</td>
<td>Accounts Payable Procedures</td>
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<td>Ethics and Conflict of Interest</td>
<td>Stress Management</td>
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<td><strong>Finance 201</strong></td>
<td><strong>Human Resources 201</strong></td>
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<tr>
<td>Agenda Process</td>
<td>Supervisory Skills</td>
<td>Budget Management</td>
<td>Effective Interviewing/Hiring</td>
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<td>Staff Report Writing &amp; Presentation</td>
<td>Team Building</td>
<td>Consulting/Purchasing Contracts &amp; Negotiations</td>
<td>Writing Performance Evaluations</td>
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<td>Records Retention</td>
<td>Diversity in the Workspace</td>
<td>Financial Reporting</td>
<td>Workers Compensation Claims</td>
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<td>Advisory Bodies Training</td>
<td>Communication Skills</td>
<td>Grants: tracking, reporting, etc.</td>
<td>Managing Marginal Employees</td>
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<td>City Codes</td>
<td>Media Training</td>
<td>MOUS - Interpretation &amp; Explanation</td>
<td>Harassment Prevention for Supervisors &amp; Managers</td>
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<td>State &amp; Federal Regulations</td>
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<td>Emergency Operations Center</td>
<td>Mentoring/Coaching Skills</td>
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<td>City Investments, Reserves, Taxes, &amp; Fees</td>
<td>Labor relations &amp; negotiations</td>
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October 2009

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10/06  GIS & iStreetView training (2 sessions)  
8:30—10:00 am (new users)  
10:30 am—noon (advanced features)  
Computer Training Room

10/07  Advanced Word 2007 Class  
11:00 am—noon  
Police Community Room

10/14  Advanced Excel 2007 Class  
11:00 am—noon  
Library Community Room B

10/14  Office 2007 PowerPoint Class  
Noon—1:00 pm  
Library Community Room B

10/14  Advanced Word 2007 Class  
1:00—2:00 pm  
Library Community Room B

10/14  Cal-ICMA Audio Conference:  
Seasons In Your Career — Issues, Opportunities and Choices  
3:00—4:00 pm  
Chardonnay Conference Room

TBD  Safety and the IIPP

10/15  Getting Your Ducks in a Row  
9:00—10:00 am  
Computer Training Room

10/21  NORCAL—Exercising Your Management Rights  
9:00 am—noon  
Concord, CA

10/21  NORCAL—Public Sector Employment Law Update  
1:00—4:00 pm  
Concord, CA

10/22  Preventing Workplace Harassment (2 sessions)  
8:30—11:30 am  
12:30—3:30 pm  
Cresta Blanca Room, Robert Livermore Community Center

10/26  Preventing Workplace Harassment (2 sessions)  
9:00 am—noon  
1:00—4:00 pm  
Cresta Blanca Room, Robert Livermore Community Center

10/28  Thinking on Your Feet: What to Say When You’re at a Loss for Words (AMA Webinar)  
9:00—10:00 am  
Chardonnay

TBD  Ergo Workstation Self-Assessment

November 2009

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9:00 am—noon  
1:00—4:00 pm  
Cresta Blanca Room, Robert Livermore Community Center

11/4  Work Smarter Not Harder for Professional and Personal Satisfaction PART ONE  
9:00—10:00 am  
Computer Training Room

11/4  Cal-ICMA Webinar: “What Would You Do?” Case Studies, Team Responses and Audience Polling  
2:00—3:30 pm  
Chardonnay Conference Room

11/5  Work Smarter Not Harder PART TWO  
8:00 am—5:00 pm  
Police Community Room

This master calendar is a joint effort between Legacy Livermore, Human Resources, Risk Management, and other City units. Please use the calendar for planning activities related to your career and professional development.
12/1 GIS & iStreetView Training
(2 sessions)
8:30—10:00 am
(new users)
10:30 am—noon
(advanced features)
Computer Training Room

12/1 Can I Hear You Now? Improving
Your Active Listening Skills
10:00 am—noon
City Council Chambers

TBD Distracted Driving

Watch your email!
Self Paced Module
Posts 10/16
Ends 12/11
Watch for new webinar announcements, too!
## Workshop Evaluation

Event Name:  
Day & Time:  
Presenter:  

Please rate the following based on this scale:

<table>
<thead>
<tr>
<th>1 – poor</th>
<th>2 – satisfactory</th>
<th>3 – good</th>
<th>4 – very good</th>
<th>5 – excellent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Value of workshop in meeting your learning needs:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organization/style of presenter:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Usefulness of handouts:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Involvement of participants in session:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Pace of the workshop:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Overall workshop rating:</td>
<td>1 2 3 4 5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

List three things you learned from this workshop that you can directly apply or benefit from in your present job or career goals:

Additional comments:

Thanks for your feedback.
Donna Pontau, Legacy Livermore Program Manager  
Phone: 925-960-4042 City Manager’s Office  
Email: dzpontau@ci.livermore.ca.us
Self Evaluation/Individual Learning Plan

Name (Print): ________________________________  Department: __________________________

Job Title: ________________________________  Review Period: __________________________

Boxes below will expand as you type – you are not limited in space.

1. List three accomplishments from the past year’s job activities and projects.
   a. ________________________________________________________________
   b. ________________________________________________________________
   c. ________________________________________________________________

2. Strengths and areas for development – Please identify areas of strength and areas where you feel you need further development. What else can enhance your performance?
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

3. List goals that you would like to achieve during the next evaluation period. Outline any necessary or required training to complete these goals.
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________
   ________________________________________________________________

4. Please provide feedback to your supervisor on the following:
   1. How clearly are expectations/requirements communicated?
   2. Is performance feedback provided with adequate frequency?
   3. If you could offer one suggestion to improve our working relationship, what would it be?

Employee Signature: ________________________________  Date: ________________
CITY OF LIVERMORE
Performance Evaluation
Instructions Page

Process:
Provide employees with the self evaluation form with enough time for them to complete the self evaluation and return it to the reviewing supervisor no less than two weeks prior to the performance evaluation’s due date. The self evaluation form should be used to aid in the evaluation process and development of future goals and objectives.

Prior to the evaluation being presented to the employee, it must be reviewed and signed by the department head or division manager. After the evaluation is reviewed with the employee, the reviewing supervisor and the employee will sign it, and the employee will have an opportunity to ask questions and add comments to the performance evaluation form.

**INSTRUCTIONS:** Use the “tab” key on your computer keyboard to move through the gray-shaded areas to be completed on this form. All boxes will expand to fit as information is typed in. Certain boxes are drop down to provide options – these will appear as you tab to them. Additional duties and objectives may be added as needed – existing quantities are for illustrative purposes only.

Below is a brief definition of each rating to help in evaluating an employee. Providing comments along with ratings is essential in evaluating employees to assist employees in understanding exactly how their performance is viewed, how improvements can be made, and how progress will be evaluated in the future. Comments are required for all areas in which an employee is rated above or below “Meets Expectations”.

**Ratings:**

- **Outstanding** – Continually performs above the highest city standards and expectations for the position. This rating is to be used only for performance that is of a superior nature. To receive this rating, the employee must have demonstrated their own initiative to go beyond what is expected.

- **Exceeds Expectations** – Performance frequently exceeds the city standards expected across the organization as well as within the department. Work is of high quality with evidence of exceptional performance for this position.

- **Meets Expectations** – Performs consistently within the expectations and requirements of the position. Competent and effective level of performance. Individual provides performance of good quality which meets the City’s standards. Overall, meets the performance expectations for the position.

- **Needs Improvement** – Quality and/or quantity of work in this area frequently does not meet expectations and requirements for this position. Results are often below city standards in this area, and improvement is needed to function at an acceptable level.

- **Unsatisfactory** - Employee fails to meet the minimum expectation of city standards for this area. Immediate action leading to improvement must be taken to prevent disciplinary action.
CITY OF LIVERMORE
Performance Evaluation

Employee Name: ____________________________
Job Title: _________________________________
Rating Period: From: ________________ To: ________________

<table>
<thead>
<tr>
<th>Type of Evaluation</th>
<th>Action(s) (if applicable)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Annual Evaluation:</td>
<td>Step Increase:</td>
</tr>
<tr>
<td>Probationary Evaluation:</td>
<td>Completion of Probation/</td>
</tr>
<tr>
<td>N/A (drop down)</td>
<td>Recommend for Regular</td>
</tr>
<tr>
<td>Other:</td>
<td>Appointment:</td>
</tr>
<tr>
<td></td>
<td>Extend Probation:</td>
</tr>
<tr>
<td></td>
<td>N/A (drop down)</td>
</tr>
<tr>
<td></td>
<td>Re-evaluate in:</td>
</tr>
<tr>
<td></td>
<td>N/A (drop down)</td>
</tr>
</tbody>
</table>

Both the employee and the supervisor are required to sign the evaluation when completed. However, the employee’s signature simply acknowledges having received a copy of the evaluation and does not necessarily indicate agreement with the rating or the rater’s comments.

I have received a copy of this performance evaluation Initial __________
Employee’s Signature: ____________________________ Date: __________
Supervisor’s Signature: ____________________________ Date: __________
Manager’s Signatures: ____________________________ Date: __________
Department Head’s Signature: ____________________________ Date: __________
Section 1: General Performance of City Standards (All employees are evaluated on the following standards):

1. Customer Service

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Employee understands who their customers are, anticipates customer needs and exhibits patience, professionalism, respect, and understanding when interacting with customers whether the public, coworkers or other department staff. Takes responsibility to resolve issues and suggests ways to improve processes to fulfill customer needs; does not pass a customer off to team members inappropriately; demonstrates ownership of the issue until resolved; delivers services on time and accurately.

2. Professional and Ethical Behavior

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Demonstrates commitment to public good, upholds public trust, exercises authority (job duties) responsibly and impartially, maintains high standard of personal conduct, treats public and coworkers with respect, honesty, fairness, and compassion. Takes responsibility for own actions and use resources wisely. Sensitive to political issues and able to think strategically when necessary.

3. Inter-personal Skills and Collaborative Nature

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Values input and knowledge of co-workers, asks for and offers help when needed, builds trust and respect among fellow team members, and maintains effective relationships with co-workers throughout the City. Demonstrates the ability to manage conflict even under difficult situations and is both respectful and respected by others; works well as a team member by helping others and contributing to a cohesive work environment within immediate work group, within department, and between departments. Identifies problems along with recommended solutions.

4. Productivity and Job Performance

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Works to full capacity, accurately, thoroughly, and effectively. Takes initiative and demonstrates interest in, and application of, a “continuous improvement” approach to systems and processes related to their work. Defines, prepares for and solves problems, uses time and resources wisely, sets and develops plans to reach goals, accepts responsibility for actions, and learns from mistakes.
5. Job Knowledge & Understanding/Compliance with Internal and External Policies & Procedures

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Employee understands the City’s goals, policies and applicable municipal code and administrative regulations, and applies them appropriately to their job; maintains thorough knowledge of job functions and responsibilities. The employee demonstrates their support of City goals and policies while on the job and represents the City of Livermore well at all times.

6. Effective Communication

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Communicates openly, honestly, and with tact. Listens to others with the goal of understanding their view, resolves conflicts in a positive way, expresses self verbally in a clear and organized manner, and expresses facts and thoughts through written letters, memos, staff reports, logs, emails etc. in a clear/organized way. Communicates effectively in a group setting including presentations if applicable.

7. Safety

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Employee follows the safety practices of the City and department and sets a safe example for others; identifies and reports safety hazards in a timely and productive manner; and takes corrective action when appropriate.

8. Problem Solving and Decision Making

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Independently analyzes situations, makes decisions, and solves problems. Takes initiative to resolve issues outside employee’s own sphere of influence. Exhibits leadership at appropriate levels and times.

9. Timeliness/ Reliability

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>
Employee is punctual and reliable; arrives at work, meetings, and other work related events prepared and in a timely manner; is dependable and adheres to work-related schedules; and does utmost to ensure that absences do not adversely impact operations.

10. Employee Duties and Responsibilities (For any duties and responsibilities that MAY NOT have been covered in other sections of this evaluation)

List by importance the major duties and responsibilities performed within the employee’s job. List as many items as appropriate. Items listed in this section should reflect the key day-to-day tasks performed by the employee. In the box to the right, indicate the appropriate rating for each duty/responsibility (Unsatisfactory; Needs Improvement; Meets Expectations; Exceeds Expectations; Outstanding). Comments are required below on all ratings except Meets Expectations. (Expand the table if more rows are needed.)

<table>
<thead>
<tr>
<th>Major Duties &amp; Responsibilities</th>
<th>Rating (drop down)</th>
</tr>
</thead>
<tbody>
<tr>
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</tbody>
</table>

COMMENTS:

Section 2: Management/Supervisory Performance

This section is required for all manager level evaluations as well as for those who lead or supervise other employees, and may be used to recognize skills and abilities of employees at any level. Use guidelines as appropriate depending on supervisory level of employee.

1. Leadership (May be used to outline leadership qualities demonstrated by employees not required to have such characteristics).

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Provides leadership to employees through motivation, delegation, and adherence to City policies. Demonstrates initiative and leads by example. Effectively communicates a strategic vision for the assigned work unit/program. Understands the work unit’s goals and leads others to ensure goals are met. Participates actively in the City Management Team. Allows others to develop as leaders at all levels of the Team, Unit, or department. Encourages and utilizes employee and team feedback for own personal growth as a supervisor, manager and leader. Effectively represents the City and Department in public meetings.
2. Employee Development

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Supervisor works with employees to create personal development plans. Supervisor encourages a culture of continuous learning and is supportive of employee’s career goals and objectives. Allows others to develop as leaders at all levels of the Team, Unit, or department.

3. Management

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Demonstrates continual accurate evaluation of programs, goals, objectives, and productivity. Participates in the preparation of revenue and expenditure budget proposals in order to assure that they are accurate, reasonable, and cost effective. Coordinates effectively within the assigned work unit, and with other City work units. Creates a cooperative work environment and proactively involves employees in work-related problem identification and resolution. Encourages job ownership and personal responsibility.

4. Supervision

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Provides guidance to employees, coaching as necessary and providing a good example to employees. Supervises employees in an effective and efficient manner including taking the initiative in confronting inappropriate behaviors and managing effectively. Commends and disciplines employees timely and appropriately. Monitors and enhances morale. Completes evaluations on time, and uses the evaluation process to support continuous learning and coaching and to recapitulate and confirm prior supervisor feedback.

5. Delegation, Scheduling, and Work Management

<table>
<thead>
<tr>
<th>Check the appropriate box:</th>
<th>Outstanding</th>
<th>Exceeds Expectations</th>
<th>Meets Expectations</th>
<th>Needs Improvement</th>
<th>Unsatisfactory</th>
<th>Not Applicable</th>
</tr>
</thead>
</table>

Prioritizes duties, delegates work effectively and ensures assignments are completed effectively and efficiently. Creates an environment where co-workers share risks & rewards. Uses available technology to complete work unit functions and implements new technology to improve work unit effectiveness. Respects and utilizes employee participation and constructive input. Measures work unit performance and continuously monitors. Aligns work unit goals with those of City, Department, and Division and ensures goals are met with the help of the entire staff.

Section 3: Proposed Performance Objective Plan
List the measurable performance objectives for which the employee was accountable during the past year. Identify the status for each objective (Not Met, Partially Met, On-Going, Completed). Comments are required if status is Not Met or Partially Met. (Expand the table if more rows are needed.)

<table>
<thead>
<tr>
<th>Review Prior Goal’s/Objectives</th>
<th>Status: (drop down)</th>
<th>Comments:</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tbody>
</table>

Identify goals and objectives with the employee for the upcoming review period and list them below. These should include mutually agreed upon criteria for determining successful completion. In addition to projects, these should also include education/experience required to improve skills and performance improvement steps required to address any areas of improvement as well as sections designated as ‘Needs Improvement’ or ‘Unsatisfactory’.

Goals/Objectives for Next Review Period

Employee Comments

Summary Comments
Experiential Learning Proposal

Name: ____________________________  Department: ____________________________
Phone: ____________________________  Email: ____________________________

1. Please select the type of experience:
   - Job Shadow
   - Special Assignment
   - Performance Academy Instructor
   - Legacy Lunch Session
   - Other

2. Please describe the experience stating the activities or content, date(s), time or duration, etc.:

3. Please list three learning objectives for this experience:

4. Supervisor(s) comments:

5. Proposed Start Date: ____________________________

6. Supervisor Approval
   Supervisor Signature: ____________________________
Building Awesome Talent

Coaching Programs

September 30, 2009
Coaching Program: 11th year as member benefit  
Career Development Committee

Coaching Program: 6th year  
Preparing the Next Generation Committee

CA City Mgmt. Foundation  
CPS Human Resources  
Int’l City/County Mgmt. Assn.  
Bob Murray & Associates  
County Administrative Officers Assn.  
Pacific Gas and Electric Company  
Granicus

CA Communities Joint Powers Authority  
Municipal Mgmt. Assn. of S. CA  
Municipal Mgmt. Assn. of N. CA  
Public Agency Retirement Services  
California Redevelopment Assn.  
Piper Jaffray  
Keenan & Associates
Need for talent development

Attract a pipeline of future talent

Retain key talent and transfer expertise

Accelerate development

Workforce Demographics Entering 2008
Overview of Session

- **Setting the Destination and Pursuing It**  
  *Joni Pattillo*, City Manager, Dublin

- **Boosting Core Competencies**  
  *Ken Striplin*, Assistant City Manager, Santa Clarita

- **Creating a Legacy**  
  *Donna Pontau*, Legacy Livermore Program Manager, Livermore

- **Building Three Pillars for Success**  
  *Don Maruska*, Director, Cal-ICMA & CSMFO Coaching Programs

...and polls and questions along the way.
Building Awesome Talent

By Joni Pattillo
City Manager
for the City of Dublin
Wednesday, September 30, 2009
Building Awesome Talent Outline

I. Set the destination
   - You Take the High Road and Others Take Another Road…

II. Course Corrections Happen!

III. Look for talent in different places

IV. Create learning opportunities

V. Believe
I. Set the destination

- You Take the High Road and Others Take Another Road...
II. Course Corrections Happen!

- Build in Feedback Loops
- Be Flexible
- Be Open to Opportunities that are not in your Strategic Plan
III. Look for talent in different places

- Find talent at all levels of the organization
- Identify opportunities to build on people’s strengths
- Identify organizational needs and people who can grow to meet that need
- Don’t be afraid to ask for new challenges
IV. Create learning opportunities

- Organizational Initiatives
  - Cross Organizational Teams
  - Built in Coaches/Mentors
- Keep it FUN!
V. Believe
Cal-ICMA Coaching Program
Building Awesome Talent

Ken Striplin, Assistant City Manager
City of Santa Clarita
Current Talent Challenges?

1. Public Misconception

2. Filling Vacant Positions

3. Leadership Development
1. Public Misconception

- Wasteful
- Bureaucratic
- Poorly managed
- Unhelpful
- Unmotivated

- Recruitment
- Organizational culture
- Non-bureaucratic
- Results-oriented
- Professional development
2. Filling Vacant Positions

Baby-boomer retirements
Hiring freezes

Identify Key Positions
Invest In Current Staff Now
Identify Growth Potential
Invest in staff

- Mentoring
- Interim Opportunities
- Ongoing Training
- Job Shadowing
3. Leadership Development

*Work to develop new leaders*
*Continue investing in current leaders*

**Leadership Academy**
*Leads, Develops, Achieves*

- **Ten-Month Leadership Development**
  - Executive Team instructors
  - Assessments and projects
  - Competency-driven curriculum
  - Peer discussion and homework
## Core Leader Competencies

<table>
<thead>
<tr>
<th>Leads by Example</th>
<th>Leads Others</th>
<th>Manages Conflict</th>
<th>Communicates</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exemplifies strong character and integrity</td>
<td>Provides purpose and direction toward achieving City goals</td>
<td>Resolves conflicts in a positive and constructive manner</td>
<td>Communicates clearly and concisely</td>
</tr>
<tr>
<td>Exhibits loyalty to the City and staff</td>
<td>Creates a sense of excitement</td>
<td>Addresses performance problems and issues promptly</td>
<td>Makes clear and convincing presentations</td>
</tr>
<tr>
<td>Establishes trust with co-workers, staff, and the public</td>
<td>Strives for win-win solutions</td>
<td>Listens and openly considers ideas and suggestions</td>
<td>Keeps others informed</td>
</tr>
<tr>
<td>Sets high standards for self and holds self accountable</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Represents self and the City in a professional manner</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>LEADS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prepares Self</td>
</tr>
<tr>
<td>Recognizes own strengths and weaknesses</td>
</tr>
<tr>
<td>Extracts learning from failure</td>
</tr>
<tr>
<td>Continually strives to expand knowledge</td>
</tr>
<tr>
<td>Understands the importance of the process which elected the Council, the importance of public service, and is committed to advancing the well-being of the community</td>
</tr>
<tr>
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</tbody>
</table>

<table>
<thead>
<tr>
<th>DEVELOPS</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creates a Vision</td>
</tr>
<tr>
<td>Creates effective strategies consistent with City policies, practices, and philosophy</td>
</tr>
<tr>
<td>Builds a shared vision with others</td>
</tr>
<tr>
<td>Sets clear goals and expectations</td>
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<tr>
<td></td>
</tr>
</tbody>
</table>
How Do Our Programs Engage?

Knowledge of career paths
Understanding and expectations
Opportunities to gain skills and grow
Sense of employee value
Motivation and engagement
What Resources are Available?

- Look inward
  - *Learn from internal talent and wisdom*

- Look outward
  - *Learn from other cities/organizations*

- Read/research
  - *Discover creative ideas/approaches*
  - *Professional organizations*
  - *Chief Learning Officer, www.clomedia.com*
Foster Pride
Grow Relationships
Cultivate Minds
Nurture Risk-Taking

Cal-ICMA Audio Conference “Building Awesome Talent” 30 September 2009
Talent Challenges

- Institutional Knowledge Exit and Transfer
- Re-tooling staff based on new service needs and competencies
- Developing leadership opportunities throughout the organization
- Attracting the “next generation” into local government professions
- Continuing training and professional growth in tough economic times
- Employee development as an integrated organizational value
Approaches

- Administrative commitment
- Staff input and feedback—Design Team, Steering Team, Liaisons
- Flexibility and adaptability
- Competency based development
- Inclusivity and employee empowerment
- Scholarships and “Train the Trainer”
- Variety of learning opportunities
- Cross-departmental teams
- Evaluation and Sustainability
Culture and Community Connection

Activities that reinforce the City’s unique community and organizational values and history.

Activities that build bonds with residents, identify community trends and needs, and reinforce service to residents as a City core value.
Performance Academy

Activities that develop employee core competencies through educational workshops or activities.
Experiential Learning

Activities such as job shadowing and special assignments that link “book knowledge” with practical workplace situations, responsibilities, and “soft skills” development.
Leadership Institute

The Leadership Institute integrates the four Legacy components:

<table>
<thead>
<tr>
<th>CULTURE</th>
<th>COMMUNITY CONNECTION</th>
</tr>
</thead>
<tbody>
<tr>
<td>Monthly discussions with -</td>
<td>--Community groups</td>
</tr>
<tr>
<td>- the City Manager or</td>
<td>--City commissions</td>
</tr>
<tr>
<td>- Assistant City Manager or</td>
<td>--Junior Achievement Day</td>
</tr>
<tr>
<td>- Department Heads</td>
<td>--Jefferson Youth Service Initiative</td>
</tr>
<tr>
<td>EXPERIENTIAL LEARNING</td>
<td>And more!</td>
</tr>
<tr>
<td>- Institute Team Projects</td>
<td>PERFORMANCE ACADEMY</td>
</tr>
<tr>
<td>- Mentoring</td>
<td>Nine monthly all-day sessions including</td>
</tr>
<tr>
<td>- Teaching</td>
<td>lunch on a variety of topics. Each</td>
</tr>
<tr>
<td>- Job Shadows</td>
<td>monthly session includes:</td>
</tr>
<tr>
<td>To name a few examples!</td>
<td>- A short departmental overview</td>
</tr>
<tr>
<td></td>
<td>- A morning discussion</td>
</tr>
<tr>
<td></td>
<td>- A team building interactive lunch</td>
</tr>
<tr>
<td></td>
<td>- A choice of two afternoon discussions</td>
</tr>
</tbody>
</table>

Launches October 2009
Communication and Branding

legacylivermore@ci.livermore.ca.us
Employee Engagement

- Legacy -- a visible reminder that the City values its employees.
- Partner with supervisor in setting job and career goals
- Incorporation of Legacy competencies and self-evaluation into annual performance evaluation
- Meeting co-workers from throughout the City
- Big-picture perspective
Resources

- Cal-ICMA /Preparing the Next Generation  www.cal-icma.org/coaching
- MMANC  www.mmanc.org
- MMASC  www.mmasc.org
- Women Leading Government  www.icma.org/WLG
- American Management Association  www.amanet.org
- Center for Creative Leadership  www.ccl.org
- Alliance for Innovation  www.transformgov.org
- TED: Ideas Worth Sharing  www.ted.com

For more information, contact:
Donna Pontau, Legacy Livermore Program Manager
dzpontau@ci.livermore.ca.us  (925) 960-4042
Building Awesome Talent™ Program

September 30, 2009

Don Maruska, MBA, JD, Master Certified Coach
Director, Cal-ICMA and CSMFO Coaching Programs
Responding to key needs

- Employs best practices for coaching
- Builds on experience with local governments
Unlock “best brain” performance

from Antonio Damasio,
Univ. of Iowa
Engage learning preferences

- Visual – *reading*
- Auditory – *hearing*
- Kinesthetic -- *doing*
Building Awesome Talent™ Program

Create New Possibilities

Unlock “Best Brain” Performance

Benefit from Others (Who’s Helped You Succeed?)

Engage Learning Preferences
1st Pillar: Create New Possibilities
-- Talent Development Conversations

- Integrate “best brain” and learning styles
- Employ proven peer coaching model
- Stimulate a culture of coaching
- Create focus and motivation for action

Example: over 70 Talent Development Conversations completed
Building Awesome Talent™ Program

- Create New Possibilities
- Translate Insights into Results

Unlock “Best Brain” Performance
Benefit from Others (Who’s Helped You Succeed?)
Engage Learning Preferences
2\textsuperscript{nd} Pillar: Translate Insights into Results – \textit{Action Plan}

1. \textbf{What} needs to be learned?
2. \textbf{Why} does it need to be learned?
3. \textbf{How} will the learning occur?
4. \textbf{Who} needs to be involved?
5. \textbf{When} will it be completed?
6. \textbf{Projected resources} to complete the process?
7. \textbf{Impact} on other priorities?
8. \textbf{Reporting needs} to track progress?

Example: 60\% completed Talent Development Action Plans
Building Awesome Talent™ Program

Create New Possibilities

Translate Insights into Results

Maximize Retained Earnings

Unlock “Best Brain” Performance

Benefit from Others (Who’s Helped You Succeed?)

Engage Learning Preferences
3rd Pillar: Maximize Retained Earnings

- “See one”
- “Do one”
- “Teach one”

Build assets for your organization

Example: 93% see opportunities to share their knowledge
Upcoming sessions

“Seasons in Your Career” *teleconference*
3:00 – 4:00 p.m., PT, Wednesday, **October 14, 2009**

“Boosting Your Career in Local Government” *live webcast from MMANC Conference*
3:00 – 4:15 p.m. PT, Thursday, **October 29, 2009**
Bob O’Neill, CEO, ICMA; Ted Gaebler, CM, Rancho Cordova, et al.

“What Would You Do?” *interactive webinar*
2:00 – 3:30 p.m. PT, Wednesday, **November 4, 2009**
Match your wits with teams of up and comers and seasoned leaders as they grapple with key issues confronting local government professionals.
- Ethical Issues
- Community Engagement
- Talent Development
Questions and Answers

Go to “Live Audio & Archives” tab at websites for recordings of this webinar and other professional development resources.

www.cal-icma.org/coaching
www.csmfo.org/coaching

Please complete the follow up survey.
Contacts for Today’s Session

- **Joni Pattillo**, City Manager, Dublin  
  Joni.Pattillo@ci.dublin.ca.us

- **Ken Striplin**, Assistant City Manager, Santa Clarita  
  kstriplin@santa-clarita.com

- **Donna Pontau**, Legacy Livermore Program Manager  
  dzpontau@ci.livermore.ca.us

- **Don Maruska**, Director, Cal-ICMA and CSMFO Coaching Programs  
  don@donmaruska.com
Results of Polls

“Building Awesome Talent” Webinar

September 30, 2009

[114 locations participating]

[CLOSED] How many people are listening on your line?

- 73% 1 -- just myself
- 16% 2 - 5
- 9% 6 - 10
- 2% 11 - 20
- 0% 21 or more

[CLOSED] Which of the following situations are important to your agency? (check all that apply)

- 71% We face retirements in some key roles.
- 61% Some employees want to advance but don’t see a path.
- 26% We are having trouble attracting quality new hires.
- 69% We need more or better ways to retain and share knowledge.

[CLOSED] We have a talent development initiative . . .

- 4% in place and meeting our needs
- 38% in place and would like to enhance it
- 17% in development
- 38% not yet, but would like to start
- 3% not important to our agency

[CLOSED] How are current financial conditions affecting your talent development efforts?

- 7% We are continuing to make this a major priority - time and $. 
- 37% This continues to be a priority but are trimming costs.
- 36% Recent budgets have made major cutbacks.
- 20% We didn’t have much going on so there wasn’t much to cut.

[CLOSED] How was today’s session useful?

- 35% Helped us benchmark or compare our efforts.
- 90% Stimulated thinking about some possible new approaches.
- 60% Identified some resources that we can tap.
- 46% Helped us broaden awareness and interest in the topic.