Developing The Next Generation of Leaders

MODERATOR  Kelley Cochran  
Financial Planning Manager, City of Redmond

SPEAKERS

Jeri Oswalt  
Learning and Development Manager, Clackamas County

Laurel Butman  
Deputy County Administrator, Clackamas County

Tracy Arner  
Financial Training Program Manager, Carl Vinson Institute of Government
Building Capacity in Georgia: A Collaboration with State Government

By Tracy Arner, M.Ed., CPA
Capacity Issue

- Turnover in budget and finance positions in the state budget office as well as state agencies led to a knowledge gap for new employees.
- Budget cuts during the national recession resulted in a lack of training resources.
Governor’s Office of Planning and Budget approached the Carl Vinson Institute of Government to discuss creating three classes to quickly onboard new budget analysts.

Goal was to eventually roll out content to agencies state-wide.
Classes – Summer 2012

- Language of Accounting
- TeamWorks Literacy and Orientation
- Revenue and Expenditure Analysis
Course Content Creation

- Used existing content from some courses
- Adapted training documents from Governor’s Office of Planning and Budget
- Worked with subject matter experts to customize to state software solution
- Held pilot sessions and modified course content
Additional content

- Debt Administration – Spring 2016
- Revenue Administration – Spring 2015
- Internal Control - Winter 2016
- Purchasing – Winter 2016
- Budget Administration – Winter 2015
Debt Administration – 12 Hours

- Why Georgia Borrows Money
- Key Roles in the Debt Issuance Process
- How Georgia Finances Capital
- Process for Capital Projects and Appropriations Process
- Bond Sale and Bond Documents
- Managing and Tracking Capital Projects
- Refunding Bonds
- Reporting Requirements
Revenue Administration – 12 Hours

- Georgia’s Revenue Structure
- Role of Revenues in Budget Process
- Fund Accounting Basics
- Basis of Accounting
- Revenue Collections Process
- State Allotments Process
- Accounts Receivable
- Treasury Management
- Treasury Report
Internal Control – 12 Hours

- Standards for Internal Control in the Federal Government (Green Book)
- Five Components Internal Control
- State policy and guidance on required internal control documentation
Purchasing – 6 Hours

- Partnered with the Georgia Department of Administrative Services
- Basics of Public Procurement in Georgia
- Overview of the Georgia Procurement Manual
Budget Administration – 12 Hours

- Georgia History, Structure, Legislative Process
- Constitutional and Statutory Provisions for the Budget Process
- Strategic Planning
- Agency Funding Request Process
- TeamWorks
- Posting the Appropriations Act
- Budget Amendments, Allotments, and Monitoring
- Budgetary Compliance Report
Certification Requirements

• Attend all courses
• Pass an online exam with a score of 70 or above for each class
• Complete the program within three years
• Continuing education of six hours every two years
Collaboration

- State Accounting Office
- Governor’s Office of Planning and Budget
- Office of State Treasurer
- Georgia State Financing and Investment Commission
- State Training Advisory Board
- Georgia Department of Revenue
Challenges

• No single source for information needed
  • Review state policy
  • Review state laws
  • Interview subject matter experts in each area
  • Create course content
  • Review content with subject matter expert
  • Pilot and adjust content as needed
• Subject matter expert availability
• Faculty resources
Results

• Carl Vinson Institute of Government documented overall financial management process for state government
• State employees have an opportunity to understand their role in the financial management process
• Prepares employees to assume increasingly responsible roles in state government
“I have worked for the state 27 years and there are still things in the budget and financial arena I don’t know. The entire program teaches you things you may not know, things that may not be in your job right now, but could easily be your job in just months or a few years. It is also good to be aware of where to find information, when you need it.”
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THE NEXT GENERATION OF LEADERS
A CASE STUDY: CLACKAMAS COUNTY
LEADERSHIP ACADEMY

A Presentation to GFOA

May 23, 2017

Laurel Butman, Deputy County Administrator
Jeri Oswalt, Learning & Development Manager
Photo by Oregon’s Mt. Hood Territory
www.mthoodterritory.com
CLACKAMAS COUNTY – THE EMPLOYER

- 5 commissioners
- 1 county administrator
- 30 departments, districts or agencies
- 8 unions
- 2 people in Learning and Development
- 1,907 regular employees
- 19% estimated to likely retire within 5 years
- 39% at the start of the Academy
Why a Leadership Academy?

• 39% of our employees were eligible to retire within 5 years
• Employer of choice
• Break down department silos
• We needed positive future focus
What is the Academy?

• One year long (October to October, April to April)

• 17 – 20 participants – Management, Represented, Non-Rep
  From 13 – 14 different Departments each Cohort.

• Selection criteria: Department need, significant contributor,
  role in organization, they’ve gone beyond job description,
  development work they have done, their ripple.

• Learning events - Individual Work – Advisor – Team Project
CLACKAMAS COUNTY LEADERSHIP ACADEMY

Advisory Committee
Executive, Management, Alumni

Selection of the Academy
16 - 20 participants

Participants Assessments
StrengthsFinder, Individual Meetings, Individual Development Plan

Academy
Year-long academy
Content based on:
* Needs Assessment
* Executive Management Team Input
* Individual

*This will help us determine course content and activities

Learning Events
- Eleven Events in 12 Months
- Full Day Events

Group Projects
- Cross Functional Teams / County Projects

Individual Work
- Self-Assigned Work & Reading
- Work with Advisor

Participants 360 Degree Assessments – Post Academy Individual Development Plan
Focused Beyond Academy for Ongoing Leadership Growth

Evaluation
Individual Meetings, Advisor Survey, Supervisor Survey, Participant Reflection

Project Presentation to Quarterly Management Meeting
Celebration with Stakeholders

Alumni
Continued Support and Networking / Supporting Roles in the Academy
Leadership Academy Events 2017 - 2018

- **Kickoff** event with The Chinook Institute for Civic Leadership – Leadership vs Management, *Extreme Leadership*, based on the book by Steve Farber
- Local Leadership examples, *StrengthsFinder* – Patty McCourt and Sue Muck of Insight Leadership
- **Speed of Trust** based on the book by Stephen MR Covey
- The *Emotionally Intelligent* Leader - Val and Roger Pease of InspirationWorks
- Leading from Where You Sit – Portland State *Hatfield School of Government*
- **Internal Consulting** (work with a current County issue or project)
- **Leading Change** – PSU Hatfield School of Gov’t
- Project Kickoff, **Project Management**
- Extraordinary Leadership – *360* and Individual Development Plan – Zenger Folkman
- Project **Presentation Coaching** – Director of Public and Government Affairs
- Quarterly Management Meeting and **Celebration!** luncheon
What makes it award winning*?

• It is the County’s Academy. Lot’s of people were involved at the design phase and a lot of people volunteer to help.
• Partnerships with the Hatfield School of Government and The Chinook Center for Civic Leadership
• Individual and group work
• Team Projects that really matter and are implemented
• Advisor/mentor

* National Association of Counties (NACo) 2014
Lessons Learned

The wrong time to start might be the right time.

One Department Director started pushing.

Hold tight to your standards and communicate them as clearly as possible.

Pay attention to the folks who didn’t get into the cademy.

Current Dilemmas

How do we get more of who we need into the Academy?

The need to engage Directors who weren’t here at the beginning.

Overcoming the “I’m too busy” “They are too busy” mindset.
THANK YOU!

Laurel Butman
lbutman@clackamas.us or 503/655-8893

Jeri Oswalt
jeriosw@clackamas.us or 503/655-8797