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Industry Issue Paper: Leadership from Within: TriMet Develops Its Next Generation of Leaders through the Operations Leadership Development Program

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# Leadership from Within: TriMet Develops Its Next Generation of Leaders through the Operations Leadership Development Program

by Sandy Vinci

Organizations and companies across the nation are dealing with the exit of Baby Boomers in the work force. This has put succession planning on the map. According to Forbes.com, about 76 million baby boomers are eligible to retire by the end of the decade. This, along with the 8.8% decrease in the population between ages 25 and 34 projected by the American Society of Association Executives (ASAE), makes cultivating leaders from within an appealing and prudent activity.

The Tri-County Metropolitan Transportation District of Oregon (TriMet) is no stranger to the issues surrounding the aging work force. With an average employee age of 45 and employment tenures of 15-plus years, the agency is facing a leadership gap. When key positions are vacated, the talent pool is limited and many do not have the necessary experience to step into these leadership roles.

Many organizations look to bring in leaders from the outside, but according to the Center for Creative Leadership, 66% of senior managers hired from outside organizations usually fail within the first 18 months.

When Steve Banta, TriMet's new executive director of operations, arrived in May 2007, he shared with the organization a succession planning project from his former employer, the Port Authority of Allegheny County in Pittsburgh. The focus of this program was teaching employees about the agency and the leadership skills needed to move into key positions. While Banta was in Pittsburgh, the program was very popular with employees and saw success for fast-tracking employees into leadership positions.

In the past few years, Pittsburgh's program was retooled in response to the volume of management changes occurring at the Port Authority. Inez Colon, director of employment for the Port Authority says the original succession planning program found and cultivated new leaders, but now focuses on training and developing those leaders and new hires to be successful in their new roles.

Banta believed Pittsburgh's original program made sense for TriMet's Operations Division. With support from General Manager Fred Hansen and the executive team, he enlisted the help of the Organization Development and Work Force Development departments and launched the Operations Leadership Development Program (OLDP) in January 2008. Six participants were selected for the program on a six-month rotation in the Operations Division. This inaugural class completed their program in July 2008.

The following is an outline of the program and the success of the program.

## **BACKGROUND**

The intent of the OLDP was to reinforce leadership's desire to promote from within whenever qualified candidates were available by providing opportunities to make them viable candidates for promotion.

This resulted in developing a systematic approach to cultivating internal talent to ensure effective leadership transition by creating a pool of employees who would be prepared to step into critical positions. With Operations as the largest division and Banta's experience in Pittsburgh, the general manager believed Operations was the best place to test the program.

## Leadership from Within

Early in the program, it was determined that participation did not guarantee placement in key positions, nor would the first pool of participants come from represented employees thus eliminating the need to incur backfill costs and delays in starting the program. As the program continues, consideration will be given to expanding the pool to include represented employees who should have the same opportunities for professional development and to determine if an agency-wide program is feasible.

An Operations Leadership Development Program Core Team was formed to guide the program's development. It consisted of the executive director of operations, the director of organization development, the director of work force development, and the coordinator of organization development. This team developed and guided the program's progress.

With internal staff resources and no need to backfill represented positions, the program incurred minimal costs to implement.

## **PROGRAM ELEMENTS**

The program was intended to provide participants with in-depth knowledge of the daily workings of the Operations Division and provide leadership mentoring throughout the process.

Based on the number of departments within TriMet's Operations Division, the program length was determined to be six months long and to include the following work units:

- Service Planning and Scheduling (2 weeks)
- Bus Operations and Training (4 weeks)
- Bus Maintenance (4 weeks)
- Rail Transportation and Training (2 weeks)
- Field Operations (3 weeks)
- Rail Equipment Maintenance and Maintenance of Way (4 weeks)
- Safety and Security (2 weeks)
- Accessible Transportation Programs - non-fixed route elderly and disabled services (2 weeks)

## **ELIGIBILITY**

All non-represented Operations Division employees were eligible to apply for the program. A determination was made that the program could handle six participants, one from each Operations discipline. This guaranteed that no single department would shoulder the burden of losing more than one employee for six months.

The application process included a review of past performance evaluations, a questionnaire, a resume review, and an interview conducted by the Core Team. Twenty-three applications were received, 11 employees were interviewed and six were selected.

## **PARTICIPANT EXPECTATIONS**

### **360° Assessment**

Participants completed a 360-degree leadership assessment prior to beginning the program and developed an individual performance plan to narrow the development gap between what they already knew or could do and what they must know or do to qualify for advancement.

## Work Schedule

Participants were told they would work varied hours and days, depending on the department rotation, and have to undergo any necessary safety training. Participants were expected to learn the business of each of the work units, but could not actively perform bargaining unit work.

## Mentors

Each participant was assigned a program mentor from among the Core Team members. The program mentor focused on developing the participant's leadership skills. Participants also had department mentors for each work area to ensure the participant gained full knowledge of the work unit.

## Program Deliverable

Each participant selected a project for the duration of the program and will deliver a presentation to the general manager in August. Participants were given one week during the program to work on their projects. Other work on the deliverable occurred during the participants' free time or during their department rotations.

## Active Participation

It was expected that participants would be fully engaged in learning and participating in each of their rotations. This included asking questions, offering insights, and working in partnership with department supervisors and managers where appropriate.

## PROGRAM IMPLEMENTATION STEPS

In addition to developing the framework for the program, the following key activities were needed.

1. **Development of leadership core competencies and 360° review.** The Core Team identified six core competencies necessary to successfully lead and manage within the Operations division and developed a 360°-review assessment that reflected these competencies. Participants completed a self-assessment and asked five colleagues to complete the same assessment about them. Results were discussed with their assigned program mentor who assisted them in developing an action plan to work on during the six-month period.
2. **Creation of a program application/selection process.** The Core Team created a process similar to hiring a new employee. Past performance and the interview were key components in the selection of participants.
3. **Selection and orientation for department mentors.** For the program to be successful, mentors needed to be selected from each discipline to guide the participant's learning experience. A series of expectations were given to department mentors to help them create rotation curriculum. One of the core team members was assigned to work with each of the department mentors in developing the curriculum and stayed in touch with them throughout the program. The program had a total of 24 department mentors.
4. **Program Promotion.** To ensure the applicant pool was as strong as it could be, the executive director encouraged applications at department staff meetings and through a letter to all eligible employees.
5. **Program Orientation.** Beginning with opening remarks from the general manager, the first week of the program was devoted to providing participants with an overview of TriMet departments outside of Operations. This included tours and discussion with executive directors, managers, and staff. A portion of the time was devoted to leadership development training focusing

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on contemporary leadership philosophies. During the remainder of the week, participants “shadowed” the executive director of operations and the senior manager of transportation and also had a half day to develop the scope of their final project.

6. **Group Activity.** Early in the development of the program, the participants requested that they meet regularly as a group to share experiences and discuss their observations about leadership. The Core Team met with all of the participants once a month. Activities at these meetings included topic specific discussions, presentations from outside speakers, and formal presentations from the program participants.
7. **Program Evaluation.** Evaluation forms were created for both the department mentors and program participants. At the end of each rotation, both were expected to complete an evaluation and return it to the Core Team. After the first program, the Core Team asked for feedback from both mentors and participants to determine if any immediate changes were needed. With input, the Core Team will evaluate the overall success of the program and make modifications as necessary.

## PROGRESS TO DATE

The first group has completed the program. Feedback from the participants and program and department mentors has been overwhelmingly positive.

One participant commented that this experience had been “life altering.” Participants have begun to apply for other jobs within Operations. The most encouraging has been one participant’s interest in a job outside his current department, a position he never would have considered if he hadn’t been in the program.

Participants engaged in problem solving during their rotations and often brought a fresh perspective to issues or concerns. Department mentors appreciated participant’s input and shared their enthusiasm for the program. Mentors were excited to share their expertise and knowledge with the participants. Participants also benefited from working with the various mentors.

One mentor said that this opportunity had “provided some ‘a-ha’ moments when looking at my own leadership style. I’ve learned that I don’t have to have all the answers, that there’s a wealth of talent and enthusiasm in the work force that just needs (and really wants to be) tapped.”

One of the participants summed up the experience by saying, “I value this program for providing me with a panoramic view of the agency which is a privilege not many people get.”

## NEXT STEPS

The Core Team has begun discussing the next round of the OLDLP. Planning will begin in August for the second group to begin in January 2009. The Core Team will gather feedback to determine if rotation schedules or content needs to be modified. The Core Team will discuss the frequency of the program and how this program might be adapted throughout the agency. Current participants will share their observations of the program and present their projects to the general manager and executive team in the summer.

Participants have expressed an interest in meeting regularly beyond the length of the program. The Core Team has discussed ways to keep mentoring them for continued professional growth and to use the expertise gained by the participants to improve operations. One idea is to use the existing group as a “think tank” for Operations problems or issues that arise. Another is to use the current participants as program mentors for the next class, using their experience to guide others through the process.

It is clear that there are more benefits derived from the program beyond the successful transition of leadership.

In the words of one of the program participants, “seeing how leadership decisions are viewed from the frontline has changed the way I think about communicating the overall vision. Frontline employees have been eager to talk with me about what they think is wrong with the organization, but also about what they think is right. There is a tremendous amount of talent and pride working at supervisory levels, and on the front line. They want to be a part of the process, and I will be better able to help that to happen after participating in this program.”

*Sandy Vinci has been TriMet’s director of Organization Development for the past 10 years. She leads a team responsible for employee communication and recognition, management training, and change management.*

*Sandy first began working for TriMet in 1974 as a service planner. She moved on to operations where her work focused on improving the work environment by bringing employees into the decision-making process.*

*In the mid-80’s she worked for three years as a legislative assistant to Oregon’s speaker of the house, Vera Katz. She returned to TriMet in 1988, first to Operations and then to Human Resources where she implemented an on-site management training program and participated in a number of process improvement activities.*

*In 2000, she moved into the general manager’s office to coordinate an agency-wide cultural change effort called the Productivity Improvement Process (PIP). PIP received one of APTA’s Innovation Awards in 2004.*

*She continues to create and implement programs like the Operations Leadership Development Program that enhance the agency’s most important asset, its human resource.*