



**Lydia Gardner**  
Clerk of the Circuit and County Courts  
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## ALLIANCE FOR INNOVATION SUBMISSION

### COVER SHEET INFORMATION

**Presentation Category (Please Select One)**

- Environment                       Economy                       Social Equity and Community  
 Planning, Urban Design, Infrastructure                       Organization and Finance

Title of Presentation: **Partners In Leadership Mentoring Program**

Jurisdiction: **Orange County Clerk of the Circuit and County Courts**                      Project Leader: **Betty Jackson**

Presentation Team Members (if Known) \_\_\_\_\_

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**\*Mandatory, most communication will be transmitted by electronic messaging.**

### Organization and Finance

We are faced with huge demands and pressures to ensure that our local governments and organizations attract and retain great people so we can create sustainable futures. The emerging labor crisis and need to remake our organizations to appeal to the "next generation" demand innovation and change to compete and thrive in a global, networked world. Financial sustainability, increasingly affected by the other sustainability areas and compounded by growing fiscal constraints, and governance challenges likewise require innovation and adaptation.



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## PARTNERS IN LEADERSHIP MENTORING PROGRAM SYNOPSIS

The Orange County Clerk of the Circuit and County Courts (OCCC) has been focused on developing its human resources (594 full-time equivalent positions) in an effort to create a better educated, satisfied, efficient and engaged employee. With a local unemployment rate hovering around 3 percent, OCCC embarked on the effort to recruit, retain and develop its leadership talent through the implementation of the *Partners In Leadership (PIL) Mentoring Program* in June 2003. The objective of the program is to help build the leadership infrastructure, cultivate talent from within the organization, positively impact employee morale, increase retention of key talent, develop successors and build a talent pool.

PIL has become a valuable tool in the overall succession planning efforts of the organization, with lasting benefits in developing employees. Employees [Mentees] who are accepted into the program have an opportunity to acquire insight into leadership roles by being paired with experienced management personnel that dedicate one-on-one time in developing the Mentee. This approach establishes a professional relationship, provides leadership training, assists the Mentee in creating a career development plan, enhances the understanding of organizational culture and improves overall communication skills. The organization's efforts to develop employees and focus on their performance have consistently led to an increase in customer satisfaction ratings with a target goal of 95 percent by the end of FY '07.

Interested employees submit an application of interest in the one-year program to the Human Resources Division. Those employees who have been identified by management as outstanding candidates for the program are encouraged to participate. A panel made of representatives from Human Resources, Administration, Mentors and past Mentees help select the new class and pair them with Mentors based on the application, interest statement, length of employment, organizational involvement and leadership qualities. To ensure that there is a wide array of representation in the program throughout the organization, the panel ensures that the class will include a cross-section of the organization with regards to the level of position and diversity.

The overall theme of PIL is truth, trust and time. The Mentor and Mentee enter into a contract that establishes honest and open communication, active involvement in the program, appropriate meeting times, confidentiality and a plan for development. Mentors play a viable role in providing career and development guidance to Mentees. As part of the learning experience, Mentors discuss their experiences with the Mentee's career development in mind and communicate in a nonjudgmental manner that will provide constructive feedback. Since the inception of the program, approximately 48 employees have completed PIL. These employees have gone on to assume leadership roles in the organization. Some have been promoted to supervisory positions or are leading critical organizational committees such as Aim for Excellence, Navigators or the Safety Team.

Over 70 percent of OCCC's workforce has been with the organization 10 years or less, and it has been predicted that the agency will see an increase in departures as more seasoned leaders retire. With a fairly diverse workforce, it is essential that the organization is able to recruit, retain, educate, develop, empower and engage talented individuals. Through the Partners In Leadership Mentoring Program, the organization is able to achieve these goals and sustain a viable future that will continue to benefit the citizens of Orange County, Florida.



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## PARTNERS IN LEADERSHIP MENTORING PROGRAM COMPONENTS OF PRESENTATION

### Innovation/Creativity

#### *1. How did you unleash or encourage creativity in order to generate solutions?*

Before embarking on new initiatives, it is essential that they align with the strategic approach of the organization as communicated in OCCC's Vision and Mission Statements.

<b>Vision Statement</b>
The Orange County Clerk of Courts delivers Excellence through Efficiency and Effectiveness in everything we do.
<b>Mission Statement</b>
The mission of the Orange County Clerk of Courts is to manage information of the justice system and provide other public services for the global community in an efficient and effective manner.

As part of the Orange County Clerk of Courts' Strategic Plan, there is a strong focus on employee development. The overall focus is to develop our human resources to create better educated, efficient, satisfied and engaged employees.

In 2003, OCCC began analyzing trend data on the departure of employees. It became clear that many of the employees were leaving due to retirement, and that many more were reaching retirement eligibility.

The table below illustrates the number of employees who are eligible for retirement by 2010 and their role in the organization.

Role in the Organization	Number	Percentage
Leadership Role	58	86.57%
Secondary Role	9	13.43%
<b>Total</b>	<b>67</b>	<b>100.00%</b>

Realizing the need for Succession Planning, the Orange County Clerk of Courts (OCCC) created the *Partners In Leadership Mentoring Program* to identify and develop key talent for leadership roles. As a major component of Succession Planning efforts, Partners In Leadership is an

opportunity for seasoned leaders to play a vital role in the career development of employees.

For this program, the Project Team Leader had full authority and was encouraged to be creative in developing a system that would meet the goal and objectives of OCCC. The following are those goals and objectives:

1. Build leadership infrastructure
2. Cultivate talent from within the organization
3. Positively impact employee morale
4. Increase retention of key talent
5. Create a tool for developing successors
6. Help build a talent pool

By achieving these goals and objectives, another opportunity was created to communicate organizational values and increase employee loyalty and productivity while developing future leaders and unleashing the creative nature of this talented group.

#### *2. What ideas or opportunities emerged during your creative process?*

From the inception of the program, it was essential to develop a mentoring system that was beneficial to the organization and employees. The organization was looking to capitalize on a talent pool for future leadership roles, and it was a tremendous opportunity for employee development. As the program began to come to fruition, the following opportunities began to emerge:

1. Ensure the program was voluntary for Management (Mentors) and Employees (Mentees)
2. Establish a contract between the Mentor and Mentee that allowed for confidentiality
3. Establish a career plan for each Mentee
4. Focus on teambuilding
5. Enhance communication skills



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6. Establish networking opportunities
7. Gain greater awareness of the political environment and organizational culture
8. Grow and invest in our human resources
9. Improve confidence level of participants
10. Establish opportunities for fulfilling leadership roles in the organization
11. Provide an opportunity for community involvement.

These opportunities further enhanced the program and added value to organization's employee development efforts.

***3. How did your program/concept stretch or improve the boundaries of ordinary governmental operations?***

PIL participants gain respect for, and understanding of, local culture, the political environment and key organizational processes and initiatives. They gain the ability to accept differences as stated in the OCCC's organizational values: "Diversity makes us stronger. We strive to create a workforce that reflects the community we serve while creating a workplace that respects and includes differences."

The program allows participants to gain experience in developing and fostering cross-functional relationships. Individuals who have mentored others or been mentored are far more likely to understand what works and what doesn't in a collaborative relationship. This is of value as our Mentors and Mentees interact with various customer segments and agencies in the course of conducting business on behalf of the Orange County Clerk of Courts.

The participants' takeaways allow the organization to develop employees in a way that will ultimately benefit customers.

Providing the proper skills to future leaders will allow for a smooth transition when more seasoned employees begin to retirement.

## Quality Management

***1. What quality management principles, tools, and procedures were applied to your service delivery?***

OCCC utilizes a Performance Excellence system that focuses on Quality Management, Process Management and Improvement, and Performance Measurement as a way of ensuring that initiatives/projects are designed and evaluated in a fashion that meets the overall vision of the organization - "Excellence through Efficiency and Effectiveness."

The organization utilizes all aspects of the Performance Excellence system along with project management tools such as the project plan to manage the implementation of our project, statement of work to define the scope, and work breakdown structure to define the deliverables to properly implement PIL. In addition, as part of the quality effort in the organization, we utilized a process management concept of Plan, Do, Check and Act (PDCA) to ensure that we have addressed all elements for us to properly implement PIL to include making necessary adjustments based on sound data. The program is structured to meet criteria established by the Malcolm Baldrige and State of Florida's Governor's Sterling Award.

## Value Proposition

***1. What customer needs and expectations were identified and fulfilled?***

The Partners In Leadership Mentoring Program offers various options to properly train and develop employees. Based on feedback from customers, the program should not only develop future leaders, but allow the organization to be successful in some critical areas - retention, employee relations, diversity, organizational excellence and effectiveness.

By reviewing feedback from customers, the program can better focus on elements that positively impact the organization. All of these yielded improvement in the following areas:



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Measurements	F06 Actual	FY '07 Goal	FY '08 Goal
Increased Customer Satisfaction Rating	93%	95%	96%
Increased Workforce Retention	86%	87%	90%
Increased Productivity Rating	89%	93%	90%*
Increased Employee Satisfaction Rating	73%	74%	75%
Decrease in Grievances	2	0	0

\* Productivity rating goal for FY '08 has been reduced due to the scheduled implementation of a new Case Maintenance System.

**2. How did your initiative improve access to your government?**

As future leaders, participants learn how to develop and foster work teams. They are now capable of assisting management in establishing a cooperative environment that is productive and service-oriented. This is evident in the overall customer service ratings for the organization that continue to improve over the years.

Participants in the program leave with a better sense of the goals and initiatives of the organization and are better able communicate with our primary customer base. They become "advocates" for the organization who are focused on providing superior customer service.

**3. How has the health of your community improved as a result?**

As part of the program curriculum, each Partners In Leadership class is required to complete a community service project in Orange County, Florida.

For FY '07, the PIL class selected BETA Center for their community service project.

BETA Center's mission is to give children and parents the knowledge and support needed to build strong, healthy families, with a focus on teen moms and at-risk families. Parents learn about

prenatal attachment, baby brain development, child development, infant mental health, school readiness and adolescence. Pregnant and parenting teens are embraced with comprehensive programs designed to meet their special needs. They learn coping skills and other developmental tools needed to successfully navigate school and life. Infants thrive under developmentally stimulating care. BETA Center promotes positive parent/child interaction and helps children and parents grow together.

BETA Center offers its services free of charge to clients and typically provides classroom instruction to 130 attendees, houses 24 women and children in their residential housing complex, and reaches out to neighborhoods in need of parenting-skill training. It is a United Way organization and time at BETA Center is often court-ordered through the Juvenile court system, with a goal of maintaining the family unit. Considering its overall benefit to the community, the 2007 PIL class felt this organization was a worthwhile agency to assist as part of their community service project.

The class also believed the BETA Center project would expose them to teens in "dilemma" with perhaps nowhere else to turn during their pregnancy. Through this volunteer effort, the 2007 PIL class will recognize that teen pregnancy can affect anyone and can devastate all involved. Not only could the class assist and learn from this organization, but perhaps lend support and comfort to young women who need to become great mothers.

**Building Organizational Capacity**

*1. How did you remove the barriers to innovation? If you incorporated critical thinking and problem solving techniques, explain your execution process. If your project involved teams, describe the level of autonomy, i.e. setting goals, HR function, budget authority, etc.*

The PIL program's workshops, projects and activities are designed to encourage innovation. From the DISC Personal Profile, which is administered during PIL Orientation, to the closing assignments, which include a group book report and a community service project, creativity and

Measurements	FY '04 Actual	FY '05 Actual	FY '06 Actual
Increased Customer Satisfaction Rating	91%	92%	93%



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innovation are keys to successful completion of the program.

Critical thinking and problem-solving techniques are required for the first workshop, which is a field trip to the Canterbury Retreat Center in Oviedo, Florida. During the workshop, activities include a Ropes Course entitled "Ties That Bind." Participants are required to engage in activities designed to foster leadership, trust, teamwork, communication, problem-solving, decision-making, conflict resolution and cooperation. The collective experience is crucial to the success of the team.

The Low Ropes Course is a carefully orchestrated set of physical and mental challenges and activities for the PIL group.

A facilitator leads the group by presenting a situation, setting safety guidelines, giving the parameters for solving the problem and providing intervention when impasses are reached.

At the end of each activity, the facilitator leads a brief discussion, which focuses on a topic relevant to the Partners In Leadership goals. Participants analyze the activity and relate relevant situations. After the group has completed the "low" initiatives, they can decide if they are ready to experience the High Ropes Course, which focuses on an individual's emotional and physical insecurities and helps them set and complete personal goals, take risks and experience personal motivation.

During the second half of the year, each PIL class is required to complete two projects: a group book report and a community service project. Although no budget authority or operational function is involved, goal setting and project planning are required.

## ***2. What technological barriers did your organization overcome?***

There were no technological barriers to address as part of the Partners In Leadership Mentoring Program.

## **Management Philosophy and Culture**

### ***1. What philosophy, literature, or body of research influenced your service delivery?***

Delivery of the program was greatly influence by the Florida Sterling and Malcolm Baldrige Criteria for Performance Excellence. In addition, literature is utilized to enhance the learning process for Mentees. For example, the 2007 PIL class will be reading books by Marcus Buckingham - "The One Thing You Need to Know"; "Now Discover Your Strengths"; "Go Put Your Strengths to Work" - of the program.

At the conclusion of the one-year program, Mentees will work as a team to develop a report and present to Senior Management their findings and an overall assessment on the knowledge they gained through the program.

### ***2. How is it evident in your program/concept?***

The overall concept of the PIL Mentoring program is to develop the talent pool in the organization for future leadership roles. The philosophy and the literature that is use only enhance the program and drive home the need for leadership skills.

## **Integrated Processes and Reengineering with the Use of Technology**

### ***1. What new technologies were necessary and what methods and/or applications did you incorporate?***

No new technologies were needed for this program.

### ***2. What business processes were used during the development of your program/concept?***

PIL was developed in support of our Strategic Perspective of Employee Development. It is also a component of our Succession Planning initiative. With these elements in mind, the overall staffing strategy of the organization focused on



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recruitment, retention and transition, which helped lay the groundwork for PIL.

The following table indicates the three major business processes - Management, Operating and Supporting - that were utilized in the development of the program. Included under these processes are key components that were involved.

Management	Operating	Supporting
Quality Management - Plan, Check, Do and Act (PCDA)	Process Management and Improvement	Financial and Accounting
Performance Measurement	Core Business Processes	Technology System
Strategic Management	Streamlined Processes	Human Resources

***3. Was an outside consultant used? If yes, please indicate the level of involvement and identify the firm.***

No outside consultant was used in the development of this program. All efforts came from internal resources.

## **Applicable Results and Real World Advice (required)**

***1. What are the applications you could share, that would be of value to other local governments (minimum of three)?***

The Orange County Clerk of Courts' Partners In Leadership Program is a model for other local governments that want to provide promising employees a structured environment in which to nurture their personal and professional potential. The following would be valuable to other local governments.

**A. Commitment and Participation from Senior Management**

As with any project, there is a strong need for commitment and participation from senior management. They set the tone and serve as advocates and mentors for the program. Their

involvement is crucial to the overall success and continuation of the program.

With this commitment and participation from senior management, both Mentors and Mentees have an opportunity to expand their technical, interpersonal and leadership skills through the mentorship relationship. More specifically, mentoring helps Mentees identify and prepare for positions that best fit their needs and interests. This in turn benefits the Orange County Clerk of Courts by enabling us to fill positions with the most capable, motivated personnel. Mentoring is functionally efficient because Mentors can help their Mentees develop more direct career paths.

**B. Focus on Succession Planning**

PIL benefits the Orange County Clerk of Courts by improving our bench strength as we strive to keep the most promising future leaders. The program focuses on developing leaders that will serve as a talent pool in our Succession Planning efforts.

Any program should align to Succession Planning efforts. It should not be a stand-alone initiative, but rather serve as a tool to enhance Succession Planning and the staffing strategy of the organization.

**C. Design Specifically for Organizational Needs and Minimal Impact to Budget**

A mentoring program should align to the overall strategy of the organization. Focus on the needs of the customers by documenting desired outcomes and requirements. This will allow the program to be developed to address gaps in the organization.

In addition, the program should be developed with minimal impact to the organization's budget. Although the program has a high return on investment, it is essential that the program can be sustained if funding levels are decreased.



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***2. What are the results/outcomes? If performance measures were used, indicate what they were within the category of qualitative, quantitative, efficiency, effectiveness, or workload statistics.***

The following table illustrates some results/outcomes that have been realized since the inception of the Partners In Leadership Mentoring Program. Overall, the primary qualitative benefit of the program has been the increased satisfaction of customers and the identification of future leaders.

Results/Outcomes	Results	Category
Number of Mentors	48	Quantitative/ Workload
Number of Mentees	48	Quantitative/ Workload
Number Applicants For the Program	80	Quantitative/ Workload
Satisfaction with Program	95%	Effectiveness
Focus Groups to Provide Feedback on Program	Positive	Qualitative
Graduation Rate	100%	Effectiveness
Overall Feedback From Management Team	Positive	Qualitative
Selection Rate	60%	Effectiveness

In addition, OCCC continues to realize increases in strategic areas as illustrated in the table below. That is due to the knowledge that has been gained by PIL participants and their ability to utilize their new skills in their work environment.

Measurements	FY '06 Actual	FY '07 Goal	FY '08 Goal
Increased Customer Satisfaction Rating	93%	95%	96%
Increased Workforce Retention	86%	87%	90%
Increased Productivity Rating	89%	93%	90%*
Increased Employee Satisfaction Rating	73%	74%	75%
Decrease in Grievances	2	0	0

\* Productivity rating goal for FY '08 has been reduced due to the scheduled implementation of a new Case Maintenance System.