



## 2024 Management/Leadership Academy

April 22-23, June 10-12, and July 22-24, 2024

The Westin Pasadena, 191 N Los Robles Ave., Pasadena, CA 91101



### The Need

Public retirement systems offer management challenges far different than those found in either the private sector or other government settings. But training to fill this unique need is not readily available.

### The Solution

The CALAPRS Board of Directors is pleased to offer the Management/Leadership Academy in-person again this year. The Academy is for mid-level managers in larger systems and supervisors in smaller systems. The ideal candidate is a retirement system subordinate manager or supervisor with a couple of years of experience leading a team in benefits, accounting, investments, or administrative aspects of your public retirement system.

The CALAPRS Board of Directors has contracted with **The Centre for Organization Effectiveness** based in San Diego to present the course. The Centre has the best approach and training resources to give Academy participants outstanding training and exposure to enterprise management, problem solving, leadership and a feedback component in the retirement system context.

Previous students have given the Academy **rave reviews**. Here's a typical comment:

*"The information presented was top level, but to be able to discuss it with the other retirement system students made the Academy a truly wonderful and beneficial experience. I know it will make me a better retirement manager for years to come."*

- Gladys Smith, Benefits Manager, San Mateo County Employees' Retirement Association.



The Academy is organized into three cumulative modules:

| <b>MODULE ONE</b>                                                                                                                                                                                                                                                                                                                                                                       | <b>MODULE TWO</b>                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                              | <b>MODULE THREE</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>APRIL 22-23</b>                                                                                                                                                                                                                                                                                                                                                                      | <b>JUNE 10-12</b>                                                                                                                                                                                                                                                                                                                          |                                                                                                                                                                                                                                                                                                                                                                                                              | <b>JULY 22-24</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |                                                                                                                                                                                                                                                                                             |
| <b>BEING AN EFFECTIVE LEADER</b> <ul style="list-style-type: none"> <li>➤ Explore Leadership Abilities Leading versus Managing</li> <li>➤ Understand the Role of a Leader</li> <li>➤ Discover Your “Why”</li> <li>➤ Explore Your Personal Leadership Style</li> <li>➤ Leading in a Public Agency</li> <li>➤ Systems Thinking- Mind Map</li> <li>➤ Nobility of Public Service</li> </ul> | <b>LEADING WITH STRENGTHS</b> <ul style="list-style-type: none"> <li>➤ Understand the Value of a Strengths-Based Approach</li> <li>➤ Enhance Your Self-Awareness, Personal Development, &amp; Engagement at Work</li> <li>➤ Learn New Ideas &amp; Techniques to Leverage the Strengths of Others and Appreciate the Differences</li> </ul> | <b>EFFECTIVE INFLUENCE SKILLS</b> <ul style="list-style-type: none"> <li>➤ Politics Defined</li> <li>➤ Political Styles</li> <li>➤ Political Power and Personal Power</li> <li>➤ Case Studies</li> </ul><br><b>INTER-GENERATIONAL WORKFORCE ISSUES</b> <ul style="list-style-type: none"> <li>➤ Generational Differences</li> <li>➤ Defining Characteristics</li> <li>➤ Managing &amp; Recruiting</li> </ul> | <b>ETHICAL DECISION-MAKING</b> <ul style="list-style-type: none"> <li>➤ Define Ethics and Ethical Dilemma’s</li> <li>➤ Understand the Complexity of the Public Sector</li> <li>➤ Analyze what Gets People in Trouble</li> <li>➤ Review an Ethical Decision-Making Process</li> </ul><br><b>LEADING CHANGE</b> <ul style="list-style-type: none"> <li>➤ Manager’s Role in Leading Change</li> <li>➤ Change Model</li> <li>➤ Change vs. Transition</li> <li>➤ Mindsets</li> <li>➤ Overcoming Resistance</li> </ul> | <b>PERFORMANCE MANAGEMENT</b> <ul style="list-style-type: none"> <li>➤ Understand the Role of Leader as Coach</li> <li>➤ Providing Performance Feedback with SBI</li> <li>➤ Understanding Coaching as Integral in Performance Management</li> <li>➤ Dealing with Poor performers</li> </ul> |
| <b>EMOTIONAL INTELLIGENCE</b> <ul style="list-style-type: none"> <li>➤ Define and Understand Your Emotional Intelligence</li> <li>➤ Discover How to Use EQ to Build Relationships, Influence, and Teams</li> <li>➤ Utilize EQ to Resolve Conflict with Others</li> </ul>                                                                                                                | <b>360° SURVEY FEEDBACK</b> <ul style="list-style-type: none"> <li>➤ Leadership Competencies</li> <li>➤ Review 360° Survey Reports</li> <li>➤ Prepare Individual Development Plans</li> <li>➤ Coaching Activities</li> </ul>                                                                                                               | <b>CONSTRUCTIVE CONFLICT</b> <ul style="list-style-type: none"> <li>➤ Identify Your Conflict Styles and Preferences</li> <li>➤ Discover Advantages &amp; Disadvantages of the Five Conflict Modes</li> <li>➤ Explore the Sources of Conflict that Most Often Occur in the Workplace</li> <li>➤ Learn and Practice Productive Management Strategies</li> </ul>                                                | <b>CUSTOMER SERVICE FOCUS</b> <ul style="list-style-type: none"> <li>➤ Who Are Our Customers?</li> <li>➤ Clarifying Expectations</li> <li>➤ Customer Service Model</li> <li>➤ Feedback from Customers</li> <li>➤ Service &amp; Satisfaction Metrics</li> </ul>                                                                                                                                                                                                                                                   | <b>DECISION MAKING &amp; INVOLVEMENT</b> <ul style="list-style-type: none"> <li>➤ Types of Decisions</li> <li>➤ A Decision Making Model</li> <li>➤ Levels of Involvement</li> <li>➤ Real Cases and Decisions</li> </ul><br><b>GRADUATION</b>                                                |

## Where and When

All three Modules will be held at The Westin Pasadena.

**MODULE ONE** starts at 10 AM on Monday, April 22, lunch will be provided, and a working reception will follow the formal instruction; students will be on their own for dinner. On Tuesday, April 23, buffet breakfast and a boxed lunch will be provided, concluding at 12 PM.

**MODULE TWO** starts at 10 AM on Monday, June 10, lunch will be provided, and a working reception will follow the formal instruction; students will be on own for dinner. On June 11 and 12, buffet breakfast and lunch will be provided; on June 11 a working reception will follow the formal instruction; students will be on their own for dinner. The Module ends with a boxed lunch (12 PM) on Wed., June 12.

**MODULE THREE** starts at 10 AM on Monday, July 22. On July 22, lunch will be provided, and a working reception will follow the formal instruction; students will be on own for dinner. On July 23 and 24 buffet breakfast and lunch will be provided; on July 18 a working reception will follow the formal instruction; students will be on their own for dinner. The Module ends with Graduation and lunch (12 PM) on July 24.

## How to Participate

Applications must be received by CALAPRS no later than **Friday, March 22, 2024**. The Retirement System Administrator/CEO/Executive Director nominates the subordinate managers (supervisors in smaller systems) for this unique training experience on the attached Application Form. The Academy will be limited to 36 students and applications will be accepted on a first-come, first-served basis. Due to limited space, CALAPRS reserves the right to limit the number of attendees accepted from each system, if need be.

**Each student and his/her administrator must commit to attendance by the student at all three modules.** Since the Academy Modules are cumulative, persons may not be substituted after the start of the first Module.

## Hotel and Travel Arrangements

It is the System's responsibility to assure that students attend each Module and make appropriate hotel and travel arrangements for Academy student(s) at the system's expense. CALAPRS has arranged for a discounted room rate at The Westin Pasadena of \$199/night + tax and encourages students to stay in the hotel for the following nights: April 22, June 10 and 11, and July 22 and 23. Instructions to obtain the discounted room rate will be distributed to applicants and posted on the CALAPRS website event page.

## Tuition

If you register online, an invoice will be automatically generated for you. If you register using the printed form, please consider the Application to be your invoice. The total cost for each Academy Student is \$3,500 and must be paid by **April 12, 2024**. The tuition covers the meals outlined above and training resources for all three Modules. Tuition is non-refundable after the start of the first session.

Attendees should read and understand the CALAPRS Event Policy, before they register for any in-person event. View the In-Person Event Policy Here: <https://www.calaprs.org/page/eventpolicy>