Eno MAX

Designed by transit agencies for transit agencies

Facilitator Handbook

An instructional guide to assist transit organizations plan, implement, and execute premier trainings for leadership teams.

Revision Log

Course No.	Date	Instructor	Reason/Description
TBD	January 2021	TBD	Revision
TBD	February 2022	TBD	Cover, Tabletop Exhibit removed, Text Fonts

Use of Training Materials

These training course materials are intended to be used for training purposes only. They have been prepared in conformance with existing Eno Center of Transportation policies and standards and do not represent the establishment of new regulations or policies.

Working document

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Introduction

WELCOME

Welcome to the ENO/MAX Team!

We are excited to share this updated Facilitator Handbook with you. The goal is to provide all members of the team with a reference manual containing directions, templates, tools, information and ideas to assist with planning and executing the yearlong program.

The Eno Center for Transportation's (Eno) role is to provide the tools and information necessary to support the Eno/MAX team in delivering this high-impact program. We look forward to working with you on another successful year.

Eno/MAX: The multi-agency exchange program — the only of its kind in the nation for current and emerging transportation leaders — is an innovation and leadership program developed by member agencies in collaboration with the Eno Center for Transportation.

Since 2012, the Multi-Agency Exchange (MAX) program has brought together hundreds of current and emerging leaders in transportation to share agency best practices and solve complex business problems.

In 2016, MAX formed a partnership with Eno and Eno/MAX was jointly formed to provide added structure and a centralized hub for program review, enhancement, and expansion. MAX is a highly rated, high impact leadership development and agency networking tool for emerging talents operating at the nexus of change, service complexity, and the customer experience. Employing a collaborative peer networking and best practice sharing model, the Eno/MAX program offers select candidates a best-in-class opportunity to explore and champion innovative solutions to real-world problems in transportation.

Successful business projects are implemented enterprise-wide resulting in significant cost reductions and enhanced customer relations. As a participating agency, you are instrumental in the success and legacy of this program.

ABOUT THIS HANDBOOK

As we prepare for a new Eno/MAX year, this handbook will provide the collective team with guidance for planning and executing the year's program and related activities.

A few topics covered in this handbook include:

- Tell the MAX and Eno team stories
- Structure and explain the process for designing and conducting a year program
- Share information and streamline communication among member-partners Provide program consistency and standardization where needed
- Serve as a reference tool for Facilitators
- Serve as a source of best practices from prior program years so that members and staff may benefit from key lessons learned

The primary focus of this handbook is to assist member agencies with the strategic and operational aspects of the program. It includes an overview of the year-long program, as well as examples and materials that can be used to facilitate a host Agency visit. This handbook may also serve as a useful guidebook to those interested in learning more about how to join the Eno/MAX program: its purpose, objectives, member/participant benefits, and impact.

ABOUT

Through an inter-agency collaboration between public transportation agencies and the Eno Center for Transportation, the Eno/MAX program brings together emerging talent from various agencies to enhance existing programs and develop the necessary talent to improve and sustain the transit experience in major U.S. cities.

This section provides basic information about the program including:

- General Program Description
- Program Background and History
- Agency Goals, Program Goals, and Learning Objectives

General Description

The *Multi-Agency Exchange* (MAX) is the pulse of the program. Eno/MAX, often used interchangeably with the term MAX in this handbook, is a highly effective trifecta of learning, leadership, and best practices among transit agencies to emerge and invest in the best and brightest transit talent.

The MAX program occurs across Agency visits which are coordinated in groups of up to four (4) participating agencies throughout the calendar year for a duration of one week each. These visits include operational tours, facility tours, business presentations, best practice highlights, business project research, networking opportunities, senior leadership forums/round tables, keystone speeches from industry leaders and leadership training. The core intent of the Eno/MAX program is for participants to get a broad understanding of an agency and its strengths, challenges, innovations, and strategies; engage in networking opportunities with a peer counterpart; receive exposure to best practices; obtain leadership and business skills training; and command an opportunity to research and present and individual business project idea to solve an agency problem.

The program is cohort-based. Each MAX agency selects eight participants from among its most talented and high-potential employees, contractors, or allied groups. Participants are drawn from the first few ranks of management of front-line employees (represented employees may also participate based on individual agency participation standards) and all would have demonstrated leadership qualities. A participating agency is grouped with up to three other compatible agencies, forming a cohort of the program year. To ensure consistency, high program value, and the desired participant engagement, cohort six is limited to 24-32 participants per group. There may be multiple MAX cohorts or groups at any given time. For example, currently, there are three cohorts of 24 participants each for a total of 72 participants actively enrolled in the program.

Participating agencies view the Eno/MAX program as a: 1) direct-line investment in their human capital and talent asset; 2) viable recruiting and retention tool for high-potential employees who value experimental training and high levels of engagement; and 3): strategic methods for exploring and capturing the agency's *deep smarts* to solve real-time problems.

In summary, the Eno/MAX program offers member-agencies and select participants unique opportunities to:

- Form a collaborative team with multiple partner agencies, representing the best major among transit leaders across the nation.
- Visit and get first-hand views of how business is done at up to three partner transit agencies in a program year, thereby informing agency best practices and valuable lessons learned.
- Deepen formal and informal networking with peers at partner agencies.
- Expand transportation industry knowledge and develop critical thinking skills on relevant trends, change, and impact.
- Get exposure to and build currency with executive and senior leadership at partner agencies.
- Conduct self-driven Business Project research at partner agencies.
- Receive Business Case and Business Project training, participate in project simulations, and hone leadership and business skills competencies.

The program has been extremely popular since its inception and has led to the implementation of multiple innovations learned through the business project/case study component of the program. Some of the innovative projects and problem solutions include:

- Learn how other agencies maintain a sustainable, high-efficiency energy rating and manage climate change; propose an implementation for greener and cleaner environments using innovative technologies.
- Review how culture impacts business strategies and propose strategies to improve the agency's culture by identifying critical gaps in cross-functional systems, communication, process, and competencies.
- Research and propose ways to make meaningful improvements to bicycle-and pedestrians-safe connections to transit.
- Learn ways to improve static and dynamic signage in stations and on vehicles for enhanced customer experience.
- Develop app to aid emergency responders in obtaining easy and immediate access to schematics for agency infrastructure and emergency equipment: lessons confusion, response time, and the number of resources.

Program Background and History

The MAX program was conceived and implemented by current and previous General Managers/CEOs of Dallas Area Rapid Transit (DART), Los Angeles County Metro Transit Authority (LACMTA) and Regional Transportation District (RTD).

The original concept was ***"to expose emerging leaders at each agency to best practices at partner agencies, to gain expertise across agencies and link up transit professionals".***

The first MAX class convened in 2012. See Appendix 1 for a representational timeline.

The MAX program was formed as a collaborative effort among transit agencies to strengthen its current and future workforce through the sharing of technical information, expanding industry knowledge in the transportation sector, and developing leading edge career skills. The program model is based on collaborative decision-making and a reliance on local agency control. Eno exercises no authoritative rule over the program or the participating agencies. Instead, it serves as a program convener, platform for consensus-based governance and decision-making, and as a reliable source for research and policy work on critical issues impacting transportation.

About Eno

HISTORY

The Eno Center for Transportation (“Eno") is the national leader regarded as the go-to source for quality research, relevant policy analysis, and professional development programs dedicated solely to the transportation industry. Eno is an independent, nonpartisan think-tank. It was founded in 1921 by William Phelps Eno (1859-1945), who pioneered the field of traffic management in the United States and Europe, and is funded and endowment bequest from Mr. Eno, as well as outside contacts, tuition, and memberships.

PROGRAM ROLE

A key role that Eno plays in the Eno/MAX partnership is to help agencies better understand transportation and identify its rapidly changing landscape. In addition, Eno provides practical, timely analysis to help agencies navigate change, anticipate disruption, and solve real-world problems. Eno’s Professional Development Programs (PDP) team is responsible for designing, developing and delivering leadership training programs that are relevant and specific to transportation workforce needs. In addition to the Eno/MAX program, PDP provides ready-to-apply training for a wide range of industry learners, from future leaders, who have just completed graduate degrees; to managers responsible for the day-to-day operations and team leadership; and to senior leaders and executives who are currently running transit agencies. In total, several hundred learners, lecturers, learning partners, and key stakeholders participate in the professional development programs each year. The overarching mission of Eno’s PDP is to improve the people-readiness of a skilled workforce, leadership development, and innovation for the transportation industry.

Eno’s role and commitment to the Eno/MAX member agencies are to:

- Serve as the reliable and trusted information source for transportation trends, research, policies, and emerging issues; and be the conveyor, and central hub, for such information as agencies, make strategically informed decisions.
- Serve as the cone and collaborative agent for the Eno/MAX program to ensure programmatic structure, consistency, and relevance.
- Provide technical, leadership, and workforce development expertise specific to transit agency needs.
- Collect, analyze, track, and report program performance data specific to business case deliverable (capstone project)

PROGRAM GOALS, AGENCY GOALS, AND PERFORMANCE OBJECTIVES

The structure of the Eno/MAX program supports the achievement of the program mission, agency goals, and shared performance objectives—designed to work intelligently and uniquely from an agency perspective. In a nutshell, the program mission cultivates the “deep smarts” of agency workers and provides a supportive forum in which an exchange of ideas, ingenuity, and strategic initiative can occur.

PROGRAM GOALS

In 2014, early in the development of the program, the participating agencies recognized the need for consistency and developed an overarching program goal that would capture the essence of the MAX program. The agreed upon goal states:

> *“Each of the participating transit agencies seek to be an employer of choice and to attract and retain an outstanding management team. To the end, the objectives of the MAX program are to prepare participants to complete for future opportunities as the next generation of middle and executive management in the transportation industry by exposing them to other agencies and ways of doing business, and by providing for the development of associates in the industry to provide for future contacts, communications, and learning.”*

Eno/MAX is a participant learning, industry networking, and leadership development program. All activities and actions related to the program are customized to further the program’s learning objectives, designed, and purposed to:

- Improve the technical knowledge and expertise of participants, thereby increasing the competitive edge for talent retention, corporate culture, and enhanced participants/ employee engagement
- Share agency best practices through information exchange and deliberate peer connections
- Develop industry-wide perspective for prospective, current, and emerging leaders
- Instruct participants on fundamental knowledge of leadership topics
- Build strong and cohesive networking of highly qualified transit industry
- Develop management tools and provide skill-building practicum in business case development, research and analysis, project management, presentation skills, communication, and critical thinking

AGENCY GOALS

Each agency develops its own specific goals for participants. These goals should be alignment with the agency’s strategic goals or visionary approach. The shared of all Eno/MAX agencies, however, include:

- Identify, develop and retain future leaders
- Engage and invest in the best and brightest talent
- Increase the agency’s ability to identify and respond to transit trends, opportunities, and challenges
- Improve staff performance and accountability
- Improve employees’ big picture transit perspective

- Share best practices and promote innovation
- Foster a strong and vibrant intra-agency community
- Solve high-priority, agency-defined business problems

PERFORMANCE OBJECTIVES

1. Develop and present a well-crafted and compelling business case proposal to agency senior/executive teams intended to solve a real-time business problem or address an unmet need (gap).
2. Build and expand peer and leadership networks across the transportation industry by participating in planned formal and informal engagement activities.
3. Increase working knowledge and understanding of the transportation industry by participating in executive-led conversations throughout the program year.
4. Enhance leadership and business skills development on timely, relevant topics by engaging in Eno- and agency-sponsored training curricula, and structured one-on-one and group coaching sessions.

Program Components

CORE PROGRAM COMPONENTS

To achieve program goals and learning objectives, the design of the program is structured and intentional and incorporates experiential learning. Each program component is engineered to support another. The primary components of the programs are:

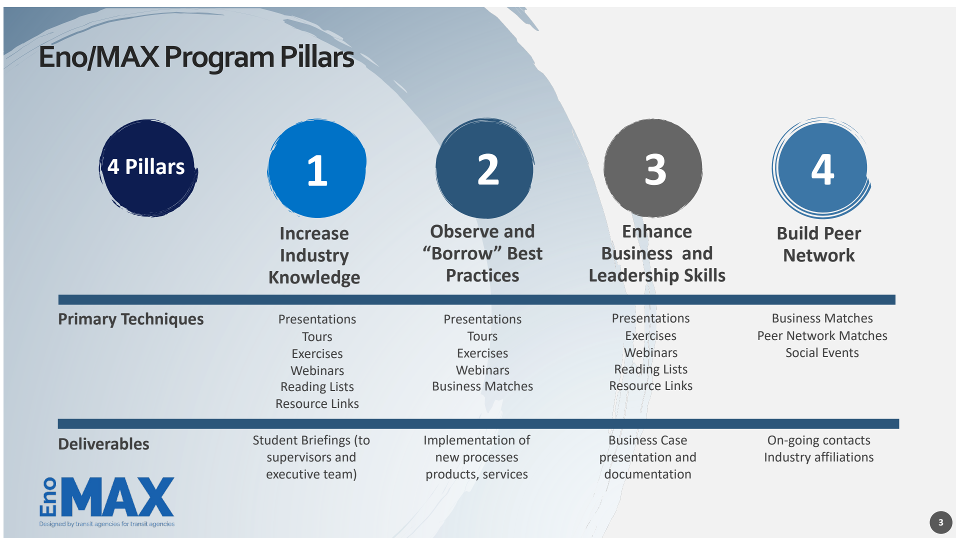
- Agency visits are sequenced and organized progressively using an inter-dependent cohort model
- Program capstone deliverable: the year culminates with a presentation-ready Business Case proposal to executive/senior leadership for a fundable business solution
- Participant advising, coaching, and mentoring throughout the program
- Peer Networking sessions: one-on-one interaction with a counterpart at partner agency to promote and strengthen inter-agency professional connections and transportation networking Business Project Information Exchange (BPIE) sessions: agency subject-matter-expert information exchange: dyadic engagement with host agency personnel with extensive knowledge in a particular area to aid participants' business projects
- Formal and informal networking opportunities (always off-the-record to include with notable transportation industry leaders)
- Leadership and core business skills training
- Program year close-out events and culminating activities to include mock business case simulation before guest VIP panel

The design of each of these components is woven together to form the *Program Year* for the cohort. In the chart below, the program components are summarized by four Program Pillars:

1. Increase industry knowledge
2. Observe and "borrow" best practices
3. Enhance business and leadership skills
4. Build peer network

Throughout the program year, designated agency staff, namely Agency Facilitators and Eno team, work in close concert to ensure all components are in place to support participation learning, and program goals and objectives. In the following sections, each program component will be explored in detail.

CORE PROGRAM COMPONENTS: PROGRAM PILLARS



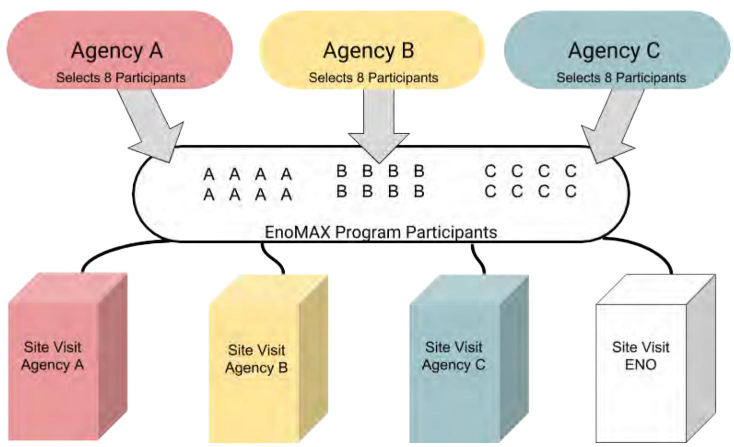
AGENCY VISITS

The agency visits are considered the most anticipated learning experiences during the program year and continue to be highly rated by participants. There is no small amount of work, however, that goes into the planning and coordination of agency visits to bring the most relevant transportation leaders and industry initiatives to the Eno/MAX forum. Agency Facilitators work diligently to connect agency employees with the visiting cohort for substantive skill and business knowledge sharing and compatibility, and to coordinate the movement of scores of people involved in the program.

The goal of the agency visit is to familiarize the visiting cohort with the inner workings and strategic approach of the host agency; safety and security practices; current expansion projects; and, overall, features that make the agency unique. This is accomplished through a mix of tours, high-level presentations from senior and executive staff, interactive activities, and peer networking opportunities.

Depending on the number of agencies in a group and the configuration, the cohort may complete four visits in total, spaced about six to eight weeks apart: three visits to other transit properties and one at their own property as the program weeks rotate among the agencies in the cohort group. During these visits, participants engage in technical information sessions, facility tours, demonstrations, networking, and interactive leadership and skill-building sessions. Between cohort visits, participants assimilate the information gleaned from the previous visits to further develop their business cases; conduct additional research and analysis; follow-up with mentors and coaches; look for opportunities to hone and apply the business skills learned; and prepare for the next agency visit. Please see the illustration below for an example of a program year overview for a three-agency grouping that would include a combined fourth week hosted by Eno.

ENO/MAX OVERVIEW FOR 3-AGENCY GROUPING



The host agency (the location where the visit rotation is occurring during a program week) is responsible for the logistics of the visit for its agency. Some of the responsibilities for the host agency include:

- Securing communicating and tracking hotel arrangements for participants
- Arranging meals/snacks for and during the program week
- Developing and uploading agenda for the program week
- Soliciting speakers and presenters (internal and external)
- Coordinating field trips, tours, and people movement throughout the week
- Organizing peer networking events

- Compiling and sharing program week learning and presentation materials
- Generally serving as on-site support to visiting participants

TYPICAL AGENCY VISIT

Typically, the cohort will arrive in time for an informal Sunday evening welcome and teambuilding activity (e.g., bowling, scavenger hunt, and escape room are among previous activities). The opening activity is voluntary, helps set the tone for the host week, and allows participants to meet and connect with one another in a casual, relaxed setting. Even within an agency, not all participants will know one another. A key benefit of the Eno/MAX program is that it facilitates the breaking down of siloes within an agency by bringing together personnel from wide cross-sections of the organization. As a result, the organization is made more permeable, transparent, and robust through interdependencies.

The program kicks off, officially, Monday morning and concludes midday Friday. Each day begins with a formally executed program agenda to include business presentations, site tours, business project information exchange (BPIE), CEO/GM executive leadership panel sessions, skills training, opportunities to network with peer counterparts at the host agency, and other activities specific to the agency or cohort. A typical program day is tightly controlled with sessions running from approximately 8:30 am to 5:00 pm (Friday ends at 12:00 pm to allow for travel). The general (topical) agenda for each visit is collaboratively determined by the participating agencies at an annual agency administrator meeting called the Facilitators' Conference, held at the end of each program year. In fact, the Facilitator Conference marks the beginning of the next program year, where the assessment of the prior year's performance is conducted and in-depth planning for the upcoming year takes place. Each agency is responsible for providing agreed upon content to keep the program relevant and engaging to participants and minimize redundancy.

BUSINESS PROJECT

The Business Project begins as soon as the agency employee, called the participant, is accepted into the program. For program acceptance, the participant would have completed the agency's own selection process by either proposing or being assigned a business problem or untapped opportunity by their agency's senior management. Eno does not stipulate a selection process or criteria. Agencies formulate their own selection process and timeline at their discretion.

Ultimately, all participant business projects are approached by each agency's senior management and the Eno/MAX program manager, known as the Agency Facilitator (see Roles on page 23).

Throughout the program year, which depending on the cohort size typically runs through April through October, each participant works on a specific business project. Participants commit to developing an implantable proposal to solve high-priority, agency-defined business problems (or untapped opportunities) using research and information obtained during the agency visits, on their own between scheduled visits, and by seeking out colleagues' areas of expertise within the cohort. The goal is to bring innovative solutions, best practices, and new knowledge to their home agency at the end of the program year. To successfully complete the program, participants are required to formally present their business cases in a simulated CEO session in the final program week, where they will be evaluated and given feedback on the overall presentation and soundness of the business case. This culminating exercise serves as a preview of the final presentation participants will deliver at their own agencies before a panel of their senior/executive team.

Outlined in the chart below is the general process flow for the business project life cycle. For clarification, it is important to distinguish between the Business Case and the Business Project. In general, a Business Case is the technical term to describe the process for evaluating data, situations, and available options to derive a plausible solution(s) for solving a problem or capitalizing on an opportunity. It is the argument—or justification— for whether a problem exists and what solution may fit. The business case is a proposal (argument/warrant) for why a business project (solution/plan) needs to be implemented.

A Business Project is a specific tactical plan to solve a problem (or optimize an opportunity with distinct start and end points with clear deliverables and outcomes) and should support or reinforce the Business Case. In essence, the business case is the strategy, and the business project is the tactical implementation of a targeted solution. In the Eno/MAX program, the Business Case spans the entire program year from start to finish. During the program year, participants work on specific Business Projects (problem or opportunity focus) to develop strong and compelling Business Cases (formal presentations) that are likely to captivate keep stakeholders and persuade them to adopt and invest. The Business Project may, and often does, extend beyond the end of the program year as the agency may decide to further research the proposed solution and/or begin implementation phases of the solution plan.

General Process Flow for Business Project *See Appendix for Detailed Information.*	
Stage	Task Documentation
Identify Business Project Problem	Each participant will propose or be assigned a Business Project/problem to work on a specific problem or opportunity within the agency Succinctly or briefly describe the Business Project by completing the Problem/ Opportunity Statement

	(Appendix 5) as part of the online program enrollment documents
Approval of Business Project	Obtain approval of the Business Project as required by the agency (specific approval include senior management direct manager and may /or agency facilitator)
Research and Explore Business Project	Participate in the Business Project information Exchange session (BPIE) at each agency visit, with identified agency Subject-Matter-Expert (SMEs) Collect data at agency visits, to include via peer networking sessions with job or functional counterpart during agency visit Conduct additional research during agency visits Continue to research, analyze data, and work on the projects between agency visits
Prepare and Fine-tune Business Case Summary Documents	Complete the Business Project Follow-up Form (Appendix 4C/D) as a guideline for drafting the Business Case Draft executive summary section of the Business Case document (Appendix 4E)
Training Available Throughout Program Year	Business Case Workshop delivered at Eno Week or the first Agency Visit Business Project Orientation offered to all participants Laser-coaching sessions offered to participants at their home agency visit, in general upon request, and between rotating agency visits
Prepare, Present and Polish Business Case	Formal presentation for the Business Case Simulation pitch to mock VIP panel at least agency, and additional practice sessions as needed at the home agency after program conclusion

BUSINESS PROJECT INFORMATION EXCHANGE

Business Project Information Exchange (BPIE) sessions are coordinated meetings between visiting participants and agency personnel who, based on their experience, knowledge, or skill, or qualified to serve as subject-matter-expert to help participants progress with their business projects. These meetings are carefully matched and coordinated by Agency Facilitators who would have studied the business project profiles of the visiting cohort and match individual (or grouped) participants to agency personnel who are considered an expert in a focus area related to the business project(s).

Participants should be advised not to rely solely on BIPEs during the program weeks to conduct research on their projects, as this will yield insufficient progress towards completion. Effective project management requires participants to devote time between program visits to seek out additional project resources and support. Participants are encouraged to use the Internet, agency-wide resources, and resources external to the agency (with the proper agency notification and approvals before doing so) to develop their business projects. For additional support, participants may seek help from agency program facilitators and Eno staff.

PEER NETWORK SESSIONS

A key program component, and responsibility of each agency, are the Peer Network Sessions (PNS). At the beginning of the program year, and prior to each agency visit, host agencies carefully review the cohort's biographic profile and select the appropriate peers for Eno/MAX participants to meet during host week. Because now all agencies organize, define, or perform work in the same way, perfect peer "matches" are not always possible. And this is not the goal. Peers may be selected based on job title; technical function; prior work experience; educational training; specialization; or scope of responsibilities. It is the networking compatibility that is the key in the job matches.

Through the Peer Networking Sessions, Eno/MAX participants can meet individually, or are strategically grouped, with their counterparts at another member agencies and share 'deep smarts' on how those agencies are thinking, strategizing, solving problems, and performing work in an area of interest. The goal of peer networking is to allow participants an opportunity to deepen professional connections— not necessarily to inform Business Projects, though this is not uncommon. At each session, participants should be paired for two hours with one or more peers (alternatively, this can be split into one-hour sessions). Sessions are unconstructed and informal interactions and may involve short visits to duty stations. (See Appendix 6 for Peer Networking FAQs). PNS, as a key program component, is a powerful way to encourage rational connections among transit workers as they engage meaningfully and form lasting professional relationships.

Peer Networking Sessions are highly rated and popular among participants. Program participants are expected to maximize their networking opportunities as an important part of managing their Eno/MAX experience, and each agency works diligently to factor in substantial time for peer interactions during the week's schedule.

OTHER NETWORKING OPPORTUNITIES

Throughout the Program Year, there will be both formal and informal opportunities for networking among the cohort(s), with other staff at the host agencies, and with guest speakers and leaders external to the Eno/MAX program. A key benefit of the program is the involvement of leaders and influencers representing multiple transportation moods. Participants are given the opportunity to have candid, off-the-record Conversations with notable industry leaders, including each agency's executive leadership team. Networking opportunities are made available through:

- Sunday night opening social activity
- Agency hosted dinner
- GM/CEO Q&A panel
- VIP Mock Simulation Panels
- Lunch Roundtables

SUNDAY NIGHT SOCIAL ACTIVITY

Each Agency visit will begin with a Sunday evening social activity. This activity is an opportunity for participants to mingle and begin building relationships with fellow cohort members. The host agency will design a casual team building activity (bowling, scavenger hunt, escape room, etc.) as well as light refreshments to facilitate, camaraderie among participants and set the tone for the week.

AGENCY-HOSTED DINNER

During the week, the host Agency will host one dinner to encourage networking among the cohort. Typically, these are business formal, plated dinners featuring a member of the host Agency executive leadership team as the keynote speaker. These dinners are mandatory given the high degree of investment and visibility by the Agency executive team and VIPs.

LUNCH ROUNDTABLES

During the Agency visit networking opportunities may be provided during lunch or outside of the scheduled training hours, including inviting designated host Agency staff to lunch with the participants. At previous Agency visits:

- Employees who are not part of the formal presentations were invited to lunch and informally spoke with participants about their areas of expertise.
- Senior staff were invited to lunch to share their leadership journeys with participants; and
- Alumni-hosted after-work networking receptions.

These activities are completely discretionary and dependent upon agencies' ability to schedule staff, and availability of staff, to participate.

BUSINESS AND LEADERSHIP SKILLS

Leadership skills training workshops are offered as a part of the Eno-sponsored activities at each of the Agency visits or combined in a separate Eno Week depending on the make-up of the groups (e.g., whether four or fewer agencies). The Eno content includes relevant and timely topics and leadership and business skills, interactive personal relationship assessments, interactive communication skills practicum, and Business Project/Case support workshops and coaching. This training is delivered by training experts and learning and leadership development, and/or organizational development to include Eno staff. Moreover, throughout the year participant learning and professional development is supplemented with web-based education, webinars, and consultation.

PROGRAM YEAR CLOSE

GRADUATION

There is a formal ceremonial presentation of certificates to all participants completing the year-long program. This officially classifies participants as Eno/MAX alumni. Participants are expected to have attended all agency visits and completed the Business Case Pitch Simulation as indicators of meeting program requirements. Participation of CEOs, partnering executives (such as members of the Steering Committee) in other senior management from each of the agencies is expected at the graduation. It is essential that Eno/MAX program buy-in and ownership at the highest levels of agencies be evident to all participants. This factor should not be overlooked as it contributes powerfully to capturing participants' momentum and engagements which can support job satisfaction, commitment, morale, and retention.

The Program Year

OVERVIEW

This section contains information about the *Program Year,* how all the components discussed in the previous section fit together to implement an effective program year, delivering the program. Administratively, each cohort has a class year that runs from November through the following October. Programmatically, the class meets April through October in a single calendar year.

Processes	Begin in…	Major Steps and Highlights
Annual Planning Process	October-November	• Facilitator Conference • Bi-Monthly Facilitator Telephone Conferences • Quarterly Steering Committee Telephone Conferences
Participants Selection	December	• Agency Recruitment and Selection Process • Agency Approval Process • Business Case/Problem Identification and Approval
Participant Enrollment	January	• Online enrollment (Eno dashboard) • Business Project identification • Agency Orientation • Eno Cohort Orientation Webinar
Agency Visits	April-October	• Agenda Planning & Execution ○ Business Presentations, Best Practices, Tours,

		Executive Participation, Business Project Research ● Eno Program Planning ○ Orientation, Business Project Training, Leadership and Business Skills Training
Post-Program Year		● Follow-up activities at home agency ○ Business Project wrap-up and presentation, agency debrief ● Alumni Activities ● Evaluation Report is compiled following each Agency visit and a year-end report produced after the final visit ● CEO Report issued by the Eno detailing activities and accomplishments of the program year

Concurrent with the program planning (content) are the complex administrative and logistical processes at each agency, including securing a hotel room block (procurement), designing, and contracting for social events, planning, and executing meal planning, identifying transportation requirements, and arranging for travel passes where applicable. Much of this is the responsibility of the Agency Facilitator.

FACILITATOR CONFERENCE

The Program Year begins with a meeting of the entire program operational team, including Eno Staff, Eno Facilitators, officially titled Leadership and Development Specialists (LDS). Agency Sponsoring Executives (as schedules permit). It is critical that each partner Agency is represented at the Facilitators' Conference by someone who can make decisions about the agenda for the Agency's host week and concur with proposed dates for other Agency Visits.

The overall agenda for the Facilitators' Conference includes:

- Review and debrief of the year just completed
- Discuss recommendations for improvement to the program format and goals for coming here
- Determine groupings, including any expansion Eno Facilitators assignments
- Set the agenda for the coming program year

The team spends a significant portion of the Facilitators' Conference Setting the year-long agenda for their group, including the dates of each Agency Visit. This is done by matching the sessions and tours that the agency would like to conduct with the topics that need to be presented as a part of the program. The chart below is an example of the four-agency group agenda and the required and recommended elements for the Program Year.

Element	Yearly Program	Each Agency Visit
Presentations	44	11
Host Agency Tours and Trips	36	8-10
Meals/Breaks	32	8
Business Projects & Peer Network Meets	12	4
Required Networking	12	3
Senior Executive Presentations	8	1
System Overview	4	
Keynote	TBD	TBD
Eno Content	20	4-6
Total	**168**	**43**

2nd and 3rd Agency Visits will have 8 hours for host agency tours and trips– the 2 missing hours will be used for Eno Content increasing Eno hours to 6 for those visits.

The outcome of the Facilitator Conference is a *draft Program Year Agenda* for each group. This agenda will include topics for all business presentations and tours for each Agency during the Agency Visit week; suggestions for networking activities; and any industry speakers (see Appendix 2 for sample Program Year Agenda). The Agency Facilitator uses this draft Program Year Agenda to develop a detailed final agenda for their Agency Visit at least 4-6 weeks prior to the Agency Visit. This agenda can be tweaked slightly in collaboration with the Eno Facilitator.

ON-GOING PROACTIVE PLANNING

After the Facilitator Conference, the Agency Facilitators begin planning detailed sessions working with Agency Staff to identify presenters, tours, guest speakers, room availability, and other activities. Eno strongly recommends utilizing Eno/MAX alumni to plan and execute program activities. It is a tremendous source of pride and fosters high morale and employee engagement.

There are periodic calls with the entire group of Agency Facilitators in the LDS to discuss progress, changes, and any obstacles that may come up. Generally, these calls are every two weeks but can be adjusted accordingly. Calls may be more frequent proceeding an Agency Visit (particularly the first one).

The Agency Facilitator and the LDS (and Eno headquarters as needed) will collaborate on planning logistics 2-3 weeks prior to a respective Agency visit to confirm the agenda.

RECRUITMENT OF PARTICIPANTS

The detailed process is described in the Participant Selection section of this handbook.

Each agency selects six-eight of its high-potential of high-performance employees to participate in the program using their own internal process. The selected participants are typically mid-level managers from all organizational disciplines: operations, finance, planning, administration, engineering, and others. Many of those selected have already completed other internal management development and training programs. In addition, select hourly or represented employees may also participate in the program.

To effectively coordinate Peer Network and Business Project Information Exchange Sessions, names and projects must be shared with the first Agency visit Facilitator 8-10 weeks **prior** to the first Agency visit.

PROGRAM YEAR—AGENCY VISIT

Each group will have 3 to 4 Agency visits (including one at their home agency). Attendance at all sessions is mandatory, barring extenuating circumstances. When the class visits a property, this is known as that agency's "host week." For an individual participant, class sessions include:

a) Agency Visits- Two to three out-of-town visits to transit properties for classroom sessions and tours. These visits are one-week long. Activities generally begin in the late afternoon on Sunday and conclude in the early afternoon on Friday.
b) Host Week- One class is held at the participants' home property, the agency's host week. Even though intercity travel is not required, participants should detach from work activities and attend all the classes. In addition, certain evenings will be occupied with mandatory or voluntary class activities.

POST-PROGRAM YEAR ACTIVITIES

At the last Agency visit of the year, a structured Graduation ceremony is held. Participation from all Agency executive staff is expected for the graduation. Certificates will be presented to each participant.

Once the participants complete the program year, marked by graduation, they will become MAX alumni with access to the alumni website, invitations to webinars and ongoing leadership opportunities with Eno.

Additionally, participants will be required to present their Business Project/Business case to their CEO and/or Executive team as designated by their Agency. There may be ongoing tasks required to execute any projects green-lighted by the senior staff.

ROLES

The collaboration between partners is one of the critical attributes of the success of the program. Clear designation of Roles and Responsibilities support this collaborative environment and eliminate confusion and duplication of efforts as well as establish standards and consistency. Following is a narrative of the roles of the major players in planning and executing the program including the participants.

The major contributors to the program are

- Agency CEO
- Agency Sponsoring Executive
- Agency Facilitators
- Eno Headquarters Staff
- Leadership Development Specialists (LDS)
- Participants

AGENCY GM/CEO ROLE

Agency GM/CEOs play a significant role in the program. Support for the program begins at the top, and this commitment to the program affects all levels of the program. To begin, the Agency CEO agrees to participate in the Program and signs a membership agreement with the Eno Center. The Agency CEO will task responsible staff members to serve as the Agency Sponsoring Executive and Agency Facilitator and empower them to make decisions and implement plans. The Agency GM/CEO should direct all staff to assist the program by speaking, meeting with participants, and offering tours upon request of the Agency Facilitator. Further, the GM/CEO encourages participants to apply to the program and provides a framework for payment of costs and time off for participation. Tasks that GM/CEO's (and by extension Executive Team) take on during the program year include:

- Final approval of the employees selected to participate. CEOs may also nominate employees directly to the program.
- Final approval of the class agenda during the host visit. CEOs may also provide input into the agenda during the development process.
- Communicating with his/her agency cohort. The GM/CEO should recognize the participants selected, emphasize the importance of business projects, and meet with them after the program year has concluded.
- Speaking to the class at least once when the program visits their property. CEOs typically speak for 30-45 minutes and focus on leadership topics, their career journey, and their vision for the agency.
- Attending the final class meeting for the participant recognition event, speaking on a Q&A panel, and presenting graduation certificates.
- Informal networking with the participants when hosting the program and at the final class visit

AGENCY SPONSORING EXECUTIVE ROLE

The Agency Sponsoring Executive coordinates executive support for the program, ensuring the Executive Team understands roles and participates in the program as required. This Executive will also participate in a Steering Committee of all participating Agencies to steer the direction of the program. This Steering Committee will make programmatic decisions impacting the program. It is recommended that this role is not combined with the Agency Facilitator role.

AGENCY FACILITATOR ROLE

Each agency assigns an individual to act as Agency Facilitator. This role, Agency Facilitator is not only of critical importance to the success of each Agency Visit but to the MAX program. The Facilitator takes on many hats and must coordinate with multiple entities for their *host week* to run smoothly and provide required collaboration and support to fellow Agency Facilitators to ensure all Agency Visits run smoothly.

The Agency Facilitator must make many decisions and implement them often with limited oversight. This requires the person to possess superior organization skills and sufficient authority from their superiors. Agency Facilitators are drawn from the Human Resources/Training Division; others report directly to the CEO/Deputy CEO. The Agency Facilitator role is estimated to require up to one-third of a full-time job. The Appendix of this Handbook includes an Agency Facilitator Section which provides details on required tasks, checklists, timelines, templates, and examples for supporting the Agency Facilitator role.

Among the tasks required of the Agency Facilitator are (tasks are described in much greater detail, in sections later in this handbook and the Appendix):

- Attend Facilitator conference with other MAX facilitators to determine year's program elements and topics
- Design and execute the participant recruitment process
- Evaluate the participating application and seek final CEO approval. This task is likely to take place in cooperation with a committee
- Act as the central point of contact for Eno Field Staff, Eno Facilitator, and Agency CEOs
- Coordinate with Eno and other Agency Facilitators to ensure topics and learning objectives are properly addressed
- Management program at their agency throughout the year

- Manage their organizations' participants during the year to optimize the program's individual impact. This includes:
    - On-boarding of selected participants
    - Identifying each participant's business project
    - Arranging travel logistics for their agency's participants
    - Attend all class sessions and ensure participation
    - Organize post-course report-out of business projects

- Plan and execute their agency's host week.
    - Develop the final agenda, using guidelines developed at the Facilitators Conference
    - Invite speakers, prepare speakers, and ensure speakers attend the proper session
    - Arrange for class emcee and/or sessions moderation *(The Agency Facilitator may prefer to act in this role.)*
    - Work with Eno Office Staff and LDS to deliver social events
    - On-site logistics such as meals, breaks, and speaker management

- Maximize the agency's return on investment by:
    - Staying in touch with alumni
    - Organizing time with senior executives to report progress on projects and other findings
    - Document participant and agency success

- Coordinate BPIE sessions and Peer Network Counterparts (one of the more complex tasks that the Agency Facilitators will accomplish during the Course Year).
    - Based on information supplied by the participant during the enrollment process, Agency Facilitators will identify staff at their Agency that can support the research necessary for the participants' Business Project/Case.
    - Using the demographic information supplied by participants about their position, department, and responsibilities the Agency Facilitator will also identify staff to meet with the participant in a Peer Network Counterpart session.
- Attend and participate in conference calls and email discussions with your group/cohort and LDS
- Serve as the contact point for membership and payment to the Eno Center

TRAVELING WEEKS

Throughout the Program Year, Agency Facilitators travel with their participants' group. The level of effort required for traveling is far less than when hosting.

However, there are several important tasks to the on:

- Prepare and execute travel logistics for the participants. This includes airfare, hotel, and ground transportation.
- Receive and distribute transit passes for the destination city. You will be provided information on how to travel by transit from the airport to the class hotel.
- Escort the participants from the hotel to activities planned for Sunday evening.
- Attend all class sessions, tours, and meals
- Assist with program logistics, if requested
- Debrief the class material on an informal basis
- After the trip, hold debrief sessions in person, by phone, or over email with participants

PARTICIPANT ROLE

Employees accepted into the Eno/MAX program are called participants and not students. The word *students* may imply a passive mode of learning where information transfer and actions are prescribed or initiated by external forces. In Eno/MAX, quite the opposite is evident: agency employees are accepted into the program based on their initiative and self-actualization, willingness to transcend themselves and what they currently know, and demonstration of leadership potential or ability. In Eno/MAX these emerging leaders are called *participants* because of their expected level of engagement in the program, commitment to action, and desire to take on, embrace and solve problems.

The Participant role includes:

- Attending all program sessions to complete the program successfully and officially
- Actively listening, engaging, and asking questions of speakers and tour guides
- Defining an impactful Business Project
    - Proactively exploring and relentlessly pursuing solutions to the Business Project throughout the year
    - Developing a coherent Business Case to present options/recommendations for the Business Project
    - Presenting a polished and provocative Business Case to agency executives for serious consideration
- Expanding their technical knowledge, raising their business competency,

and improving their overall performance
- Developing a diverse and sustainable peer network for future collaboration and problem-solving
- Developing a more concise understanding of his/her own agency, current and future operating environments, and challenges and opportunities as they relate to the larger transportation industry
- Developing an actionable career advancement trajectory to include personal and professional growth, agency-based influence and achievement, industry leadership, and national transportation forerunner

ENO STAFF

The Eno provides two types of support to the Program: The Eno staff, based in Washington, DC, and Eno Facilitators. Specific tasks handled by Eno staff include:

- Provide overall program leadership and operational management
- Act as program convener to collaboratively develop, sequence and implement the yearlong agenda
    - Oversees Agency Visit dates and overall Program Year calendar management
- Provide business competency skills and leadership training modules
    - Development of leadership and business skills workshops
    - Provision of staff to deliver these modules
- Identify leading industry practitioners and thought leaders and arrange for them to speak to the class
- Manage a robust evaluation process where participants evaluate the course and provide feedback which is used to modify and improve the class
- Facilitate communication among Eno/MAX stakeholders
- Maintain and curate the program website
- Distribute program information as required such as agency profile and system information, speaker bios, etc.
- Provide member program (benefit) to help pay for one social event during each Agency Visit
- Coordinate, develop and pay for the end-of-year recognition dinner and graduation certificates.
- Assist Agency Facilitators with logistics, speaker preparation, agenda drafting, and other duties on request
- Implement alumni activities
- Offer proactive suggestions for improvement, including use of Eno resources to achieve those improvements

- Recruit new properties and arrange groupings for future years

LEADERSHIP DEVELOPMENT SPECIALIST (LDS)

The second type of Eno team member are the Leadership Development Specialists (LDS). Each group is assigned an LDS. The LDS remains with the group for the entire program year and attends all agency/class visits. The LDS has primary responsibility for representing Eno during all program weeks, demonstrating leadership and high-level member care throughout the program, and executing Eno-related and program support tasks such as:

- Assist with guest speaker coordination, website update, and collecting and compiling evaluations
- Provide support to participant business project/case process, including delivering workshop and coaching sessions, and individual coaching, as required or requested
- Organize and lead scheduled preparation calls throughout the year and debrief calls after Agency Visits
- Prepare consolidated Participant Information Database/Spreadsheet
- Collect and disseminate participant evaluation data, producing a final report after each Agency Visit and preparing a comparative report at end of Program Year

Further, the LDS is the primary contact and support resource for the Agency Facilitator. Examples of support the LDS may provide to Agency Facilitators include:

- Acting as a session emcee as needed or requested.
- Serving as a session or event moderator, or lead an Eno-sponsored training session
- Assisting with logistics such as agenda planning and distribution, meals, etc.
- Escorting participants on tours or to/from the class site.
- Other tasks as requested

AGENCY VISIT (HOST WEEK)

During the program year, when the cohort visits your Agency, it is your *Host Week*. The responsibility for both planning and executing this week rests with the Agency Facilitator and requires intensive coordination and scheduling. Many of the tasks the Agency Facilitator must accomplish are going on at the same time. Hosting the class will be the most intense portion of the program for the Agency Facilitators.

All Facilitators will have worked together at the Facilitator Conference to determine the elements and topics of the week. The outcome of the facilitator conference provides a framework for the content, but many details remain for the Agency

Facilitator to complete. Each class session will be unique and will vary from year to year. While this handbook can provide useful insights, each Facilitator will have a much deeper awareness of their own region, speakers, tours, and venues.

Major Steps in Planning Your Host Week	
Finalizing Host Week Agenda	Finalize Agenda based on the draft agenda developed at the Facilitators Conference
Plan Travel Components	Make Hotel Arrangements
	Secure Transportation Pass for all participants, Agency Facilitators, and Eno staff attending Agency Visit (may need headshots)
	Develop Welcome Kit including instructions for getting for hotel from the airport, getting to the meeting location(s), brief Agency overview, week's Agenda, things to do, etc. *This Welcome kit will be posted on the Eno website, so all participants have access to the electronic version*
	Alert participants on the appropriate attire to pack for the week (Safety attire for tours and field visits, professional attire for pictures, executive meetings, etc.)
Design Content and Class Sessions	Identify content and speakers for Agenda items, including the following • System Overview • CEO/Senior Executive Presentation • Tropical Presentations (including Agency electives) • Peer Counterpart Network Meetings • Business Process Information Sessions • Eno Content leadership/management training • Guest lectures/keystones
	Develop Networking Time • Sunday Evening event • Weeknight Dinner (optional) • Roundtable Lunch with Senior staff (optional) • Social Event with Agency Staff (optional) • Alumni Event (optional)

Design Tours	Identify content and speaker for Tour as drafted at Facilitators Conference Secure and Safety Gear required for participants Coordinate transportation to and from Tour site Arrange for Radio/earpieces from Eno staff (as approved by Agency)
Identify and Schedule Speakers	Confirm Speakers Availability Prepare Speakers ● Topic Summaries ● Presentation Guidelines ● PowerPoint Templates ● Follow-up/Practice Identify and confirm Moderator Availability Prepare Moderators
Coordinate general logistics for this week	Make arrangements for Conference room/classrooms Obtain and test required AV Coordinate meals and snacks

FINALIZE HOST WEEK AGENDA

Each Agency Facilitator should take information from the Facilitator Conference and discuss options for scheduling their host week with their superiors and the CEO, obtaining any necessary approvals. It is important to finalize the Agency Visit dates prior to Participant Recruitment beginning. The dates of the visits are included in the information to potential participants so they can confirm their availability for all weeks.

During Facilitator Conference in addition to proposed dates, a high-level agenda for each Agency Visit has been cooperatively developed. That agenda provides the overall direction for the development of each individual site visit; however, each agency may modify that plan to reflect new developments or logistical concerns. These changes should be communicated to the entire facilitator group to ensure that the overall program content (objectives and topics), is not materially impacted.

PLAN TRAVEL COMPONENTS

The participants, Facilitators and Eno staff will need to get around between the airport, hotel, and meeting sites. The host Agency Facilitator will provide access to transportation (temporary pass, mobile app, etc.) and information for all participants.

DESIGN CONTENT AND CLASS SESSIONS

Once the Agency Visit dates and draft agenda are approved by the senior staff at the Agency, the Facilitator can begin the work of building the detailed agenda, an hour-by-hour local agenda for their site visit. This draft agenda should be shared with all Facilitators at least two months in advance of host week, to minimize duplication and ensure required topics are covered. This early agenda should be drafted before speakers are invited. Agency Facilitators will transmit their feedback, if any, to the LDS. The LDS will return written comments to the host, considering the feedback from other parties and the adherence to the year-long schedule. Differences between the host week agenda and the year-long agenda will be discussed between the LDS and the host week facilitator. The host Agency Facilitator will transmit a draft final agenda to the group, after speakers have been confirmed. The feedback process shown above will repeat.

DAILY AGENDA ITEMS

Each of the programs should include time for

- Safety moments
- Daily previews
- Daily wrap up
- Evaluations

These items should be placed on the agenda, even if minimal time is allotted to those activities. The LDS will take the lead on introducing each day, soliciting participant observations, and distributing/collecting evaluations.

RECOMMENDED CONTENT

Based on the draft agenda developed from the Facilitators Conference, the Agency Facilitator will determine how best to present their assigned topics/elements.

Senior Executive Presentation, Welcome and Roundtables Sessions with Senior Executives are similar in format to Staff Presentations, but are delivered by the agency CEO, Deputy CEO, elected official, or board member. Because these sessions are typically led by the hosting Agency's CEO, they usually cover the key issues facing the agency as well as leadership lessons from their personal experience. Approximately half of the session should be reserved for Q&A. Senior executives are not encouraged to give system overviews, as this is information that can be presented by another staff member or supplied in pre-class reading materials.

All senior executive sessions should be off the record so that both the executives and the participants can have a candid conversation without fear of being published.

System Overview
Each class session should include an agency overview of similar depth and length. This should not be delivered by the CEO and is an ideal subject to be covered by the Agency Facilitator or a recent alumnus.

Business Presentations/Topical Presentations
While actual content does vary, presentation sessions typically involve knowledgeable people on the topics identified to discuss their responsibilities and challenges in their positions. Most speakers will be mid-to senior-level managers. These also include discussion of timely important issues at each of the agencies.

The ideal host agency session would be one speaker per one-hour session. If a panel makes more sense for the topic more time should be allotted to the session. Whether the session is a solo speaker or a panel, each session should include approximately a quarter of the time toward questions and answers. All speakers in the session should be introduced by a session moderator and participate in the Q&A portion of the session.

Peer Network Counterpart Meetings
The Peer Network Counterpart component will occupy one hour of time and will consist of one-on-one meetings between visiting participants and their analogue at the host property.

Business Project Information Exchange
Business Project Information Exchanges can take up to three hours on the agenda

but can be split up into two sessions. Some business project information exchanges might be over meals or at the end of the day to facilitate site visits.

Skill Building Workshops
Some agencies have workshop modules from their Leadership/Management Training programs that they want to showcase to the group. If workshops are offered, they supplant time that would have been reserved for normal speaker sessions. If all parties agree, optional workshops might be offered on Friday afternoon or after normal class hours.

Eno Content - Leadership Training
Eno will be providing content at each of the Agency visits (between 4-6 hours). Included in this content is:

- Orientation
- Business Project/Case Workshop
- Business Project/Case Coaching
- Business Case Simulation Pitch
- Leadership and Management Topics

Guest Lectures from Industry Experts
At each class meeting, Eno will invite and pay for a guest lecturer to address the class, as the agenda permits. These speakers will be retired or from an organization not represented in. Eno will work with the Agency Facilitator to locate a suitable speaker that fits with the message and content of the relevant host week. Topics will vary but can include industry-wide trends, innovation, leadership lessons, or interesting career journeys. Some agencies have chosen to make the guest lecture more of a leadership guest speaker over lunch or dinner. Eno will also take the lead on preparing Graduation activities and certificates when applicable.

NETWORKING ACTIVITIES

Networking is one of the most valuable portions of the program for cohort participants and can be formalized or occur during impromptu moments. This essential element tends to happen throughout the entire year and may include program alumni as well as agency staff who are not participants.

Each host week begins with a welcome event. This event is paid for by Eno and can include happy-hour style reception, sporting events, or light physical activities. This event occurs on Sunday evenings of each host week.

Many properties host a welcome dinner on Monday evening. The location and cost of this event is at the discretion of each property.

Allotting Down Time

Networking and time to process the sessions, workshops, and host agency tours and visits are essential to the ability for every Participant to get the most out of their participation. Individuals learn and grow through a variety of approaches. Therefore, breaks and downtime are required elements in between sessions and throughout the day. Usually, there are two 15-20-minute scheduled breaks during each day. Additional unscheduled breaks may occur, as well. Realistic travel allotment for host agency tours and location visits should be included. At least three evenings should have no scheduled program activities. However, optional (voluntary) organized evening activities may be scheduled for class participants.

DESIGN TOURS

Tours at the host agency are a critical part of the program. Over the course of the year, the tours typically cover almost all aspects of a transit agency's operations: garages, stations, transit-oriented development, control centers, capital projects, police, and infrastructure maintenance. One key objective in this area is to carefully select which tours are done at which host properties to maximize the benefit to the participants while minimizing duplication. Tours should typically be in the afternoon and should be the last item on the agenda. This scheduling gives time flexibility to the tour, and ensures no speakers following the tour's scheduled time are inconvenienced. Tours should be interactive and have at least one tour guide who is knowledgeable about the equipment, service, or project featured in the tour.

At the start of each tour, the participants need to be provided with the learning purpose of the tour and provided an overview. This can take place in a classroom setting, or it can take place in route. If possible, participants should ride in vehicles normally used in revenue service. Each vehicle used for host agency tours and visits should have one knowledgeable guide on board with appropriate audio support. The purpose is to answer participant questions and introduce the host agency tours during the time in transit.

Time in transit should not exceed the time on site for the tour. Tours should be able to accommodate a person with mobility impairment. Total time on individual tours (including transit time) should not exceed 3.5 hours. Tours can visit more than one location and/or use more than one type of vehicle/service.

Some tours might include riding on vehicles in revenue service. When planning this type of tour, it is important to schedule travel during non-peak periods to avoid vehicle crowding. Further, the tour purpose and overview need to be delivered in a classroom setting because audio aids will not be possible on a revenue service vehicle.

IDENTITY AND SCHEDULE SPEAKERS

Speaker Recruitment

Now that the topics have been set for each property, the Agency Facilitator should begin thinking of the speakers you would like for each topic. Choose your speaker based on knowledge of the topic and presentation skills. This does not always have to be the highest-ranking person in the department.

Speaker Prep

Once the speakers have agreed to participate, the facilitator should send out a confirmation email with the confirmed location, date, and time. This should also include guidelines for the exact topic you would like them to speak on and AV requirements/requests. Each speaker should be offered a prep session with the Agency/Eno Facilitator and sent the good presentation guidelines worksheet (found in Appendix #). A week before the event, send another confirmation email with the same information and update any information if it has changed. New speakers will receive information on the MAX Program and its learning objectives (Appendix #). All speakers and tour guides should receive information on the class roster and current year agenda. Speakers should be encouraged to discuss leadership lessons in addition to technical content. The Eno Facilitator is available to help prepare the speakers, upon request.

Moderator

Each session should have a moderator. This individual will sit at the front of the class, introduce speakers, and moderate Q&A. The Eno Facilitator is available to fill this role. Some agencies prefer to use alumni in this role.

Day-of Speaker Management

Speakers should receive a reminder email the day before their presentation regarding scheduling and other logistical details. The Agency Facilitator's cell phone number (or designee) should be provided. Speakers might arrive early and are welcome to view portions of the class they are not participating in

COORDINATE GENERAL LOGISTICS

It is good practice for the host facilitator to communicate prior to their agency host week other useful information to the class members such as:

- Typical weather expected during the class
- Attire requirements, which may include safely related attire requirements for tours
- The availability of guest Wi-Fi services
- Recommended sights during free/off time for the visitors, including recommended nearby restaurants, activities, and retail establishments.

This information may also be included in an agenda packet distributed prior to the visit or posted on the class web page. Host agencies also provide transit system passes for the week for the class and facilitators along with information on using the transit system. Eno has available sets of audio devices for use based on the host Agency's communications system.

CONFERENCE ROOM SCHEDULING

When choosing and classrooms for the business meetings, consider the number of people that will be attending each session, approximately 32 participants, 3 Agency Facilitators from each Agency in the Group, 1-2 Eno staff, additional staff from your agency (moderator, photographer, a/v support, etc.). Also, consider the session and arrangement of the room.

A/V

The minimum required AV for the host week is a projector and screen, internet access, and a podium with a microphone. A portable microphone may be helpful for Q&A depending on the room setup and class size. You may need sound and video capability depending on the presentations. If doing tours in loud areas, it is suggested to have available a megaphone or portable mic or tour radio headsets to help the class hear the comments better. Meeting rooms should have wireless internet access to support the presenters and the participants.

MEALS

Because of constant activities required during site visits meals should always be planned and given adequate reserved time. Individual meal preferences and dietary concerns for every participant should be communicated and adhered to between Facilitators for a variety of options at each event. Lunch is provided each day. Breakfast is sometimes provided and may also be included in a negotiated hotel room rate. Participants should also have access to coffee, water, and other beverages throughout the day and especially during scheduled breaks. Light snacks (granola bars, dried fruit, cookies, etc.) are also welcome.
Lunch is usually between 12 pm—1 pm and might be catered by a local restaurant or in-house cafeteria. Alternately, a boxed lunch can help lessen the amount of set-

up and clean-up time and effort. The Eno Facilitator is available to assist with meal logistics if needed and upon request.

A logistical note on meals is to try to avoid having meal set-up in the same room as the main program, particularly where speakers are presenting and may be distracted or interrupted by unavoidable noise associated with setting up meals or coordinating catering deliveries.

SHARING PARTICIPANT INFORMATION

The LDS has the responsibility for compiling all the participant information (demographics, business projects, emergency contacts, etc.) in a spreadsheet that is shared with all Agency Facilitators in the group via email and online on the Eno website. This information is retrieved from the online Enrollment database in which participants are required to enroll. In addition, the enrollment database is used by Eno Headquarters staff to prepare Fact Sheets on each participant.

This spreadsheet (called the "Group Matrix") listing program-relevant participant information is used to plan and coordinate host Agency visits. The Business Project Information Exchange meetings are developed based on the information the participants provide on their business projects. The Peer Network Sessions are assigned based on the information provided by participants on job title, department, and work assignments. Additionally, personal information on food allergies, medical challenges help the Agency Facilitator to provide any necessary accommodations for participants. Finally, shoe size, tee shirt size and cap size provide Agency Facilitators with information necessary for any planned sports activities or souvenirs.

The Group Matrix spreadsheet gets updated throughout the year, particularly around the Business Project Information Exchange meetings.

PARTICIPANT SELECTION

Each agency selects six-eight of its high-potential or high-performance employees to participate in the program using their own internal process. The selected participants are typically mid-level managers from all organizational disciplines: operations, finance, planning, administration, engineering, and others. Many of those selected have already completed other internal management development and training programs. In addition, hand-picked hourly or represented employees may also participate in the program.

Each Agency uses the Recruitment process which best fits their organizational culture. Among the processes used by the Agencies have been:

- Open Admission – employees self-nominate with various levels of approval by immediate supervisors through Senior Executives
- Leadership Ladder – pre-requisites to participation include completion of agency specific internal training program(s)
- Executive Nomination – employees are selected for participation by senior levels of Agency Management

Typically, Agencies begin recruitment after the Facilitator Conference, where the exact program dates for each Agency Visit week are agreed upon so that potential applicants will determine availability for full participation.

Participants should commit to the pre-course and post-course work, as well as attending all the class meetings. Class meeting dates will be available before participant recruitment begins, and those sessions should be provided to prospective applicants. Pre-Course Work requires the selection of a Business Project, a kickoff webinar, and other activities identified by the Agency Facilitator. Post-Course and alumni activities are designed to reinforce the technical and skills knowledge gained during the year, maintain a focus on the implementation of their Business Project, and help continue to maintain and develop their professional network.

REPRESENTED EMPLOYEES

Some agencies have participants in the program who are represented by a union. The agencies view represented employee participation as an opportunity to improve relationships, involve front-line operators, and locate management potential.

Represented employees may have a different experience than non-represented employees. Their travel permission, work schedule, and duties must be approved by the union. Eno and the other Facilitators should be aware of any limitations and follow the instructions of the union. Some represented employees will not travel to all the site visits. Agency Facilitators should inform their group as soon as possible about the actual number of participants traveling to each visit.

PROGRAM ADMISSION

In this section, three systems for admitting participants to the program are discussed. Agencies individually execute the recruitment and selection process.

Therefore, each agency performs their admission in a unique fashion. The best recruitment and selection method is one that ensures a diverse participant group, has strong senior management buy-in, and preserves the exclusivity of the program.

In all circumstances, the program is broadly announced. Interested employees must indicate their interest in participating, usually through some sort of application form. In addition, the employee's direct supervisor should support the application and indicate their understanding that the program requires significant out-of-office time. Some agencies use a hybrid of the following techniques.

NOMINATION BY SENIOR EXECUTIVES

In this selection method, senior executives at the agency nominate participants. Prospective participants complete an application, which are then reviewed by executives overseeing that functional area of the organization. The highest-priority candidates are forwarded to the CEO or a committee of senior executives for final selection.

The main benefits of this selection method are a smaller number of applications to review, and the early involvement of senior executives and the CEO and resulting attention to program outcomes. Potential issues with this method include an appearance of favoritism and unequal commitment to the program from different functional areas (resulting in fewer participants from that area).

OPEN APPLICATION

Under an open application process, any employee of the agency can prepare and apply. Selection to the program is made by a review committee. This process should require a detailed application. An open application is the most egalitarian process, but it requires the heaviest lift in reviewing the volume of applications. Another drawback is that managers may not know about the participant's interest and may not support the cost and out-of-office time required. Criteria for selection might include:

- Role, position, and functional area
- Career goals
- Other courses or certifications completed
- Tenure
- An expressed desire to serve in a transit leadership role

LEADERSHIP ACADEMY PREREQUISITE

Some agencies have an internal "leadership academy" that serves under an open application process, any employee of the agency can prepare and apply. Selection to the program is made by a review committee. This process should require a detailed application. An open application is the most egalitarian process, but it requires the heaviest lift in reviewing the volume of applications. Another drawback is that managers may not know about the participant's interest and may not support the cost and out-of-office time required. Criteria for selection might include:

PARTICIPANT ADMISSION

Each Agency follows internal procedures to finalize the selection of participants and officially notify senior management and Agency Facilitators. Once participants are finalized, each participant must complete an online Enrollment Form.

Data from this enrollment form is used throughout the program to share participant demographic information for peer and project collaboration, identify business project information, participant dietary restrictions, etc.

PARTICIPANT ORIENTATION

It is advisable that each partner Agency hold an orientation with admitted participants prior to the start of formal activities. The purpose of this orientation is to discuss participant roles, answer questions and set the expectation for the program. This also begins the networking of the Agency team, as all the participants may not know one another. Admitted participants have some pre-course activities they must complete. Many agencies hold an internal orientation session with their participants to go over the program and introduce the group to each other and the Agency Facilitator.

KICK-OFF WEBINAR

Eno hosts a kickoff webinar in February-March to prepare the participants and introduce team members across the country.

PARTICIPANTS DEFINE BUSINESS PROJECTS

Participant business projects/cases are the capstone of the program. Admitted employees will begin defining their business projects immediately after program admission, with the goal of finalizing the business project identification and scope within a couple of weeks after the kick-off webinar. A copy of the form used to articulate the participant's business project is shown in Appendix 5.

PROGRAM FUNDING AND INVESTMENT

Participating in Eno/MAX requires considerable financial and time commitments. Remember, Agencies are investing in high potential, select employees who may potentially save the Agency millions of dollars with their idea/solution. The program is funded by the individual participating agencies, which allows for the sharing of many program costs. The program financial commitment is in two parts: a) to Eno for program management and b) internal expenditures. Each agency makes a one-time payment to Eno of $35,000 in initiation fees for program development, training, and on-boarding of key agency staff and $44,500 on an annual basis as membership dues to support Eno's ongoing program management and content delivery activities.[1] The annual contribution is considered a membership in the Eno Center for Transportation, and confers member benefits and advantages such as subscriptions and tuition waivers.

There are also internal costs associated with the Eno/MAX membership. Undoubtedly, participant and agency staff (Facilitator) travel consumes most of the internal cost for Agencies. For the required eight participants enrolled in the program for a year (roughly 10 months), the Agency should budget approximately $50,000 for travel costs.

In addition, each Agency is responsible for the travel cost for its participants and facilitator (up to $45,000 annually); the cost to host the class at the agency's facilities are approximately $10,000; and miscellaneous costs of approximately $5,000 throughout the year should be factored in as well.

Each participant in the program will spend four full work weeks out of the office. This out of office time is composed of agency visits, Eno Week when applicable, and the participant's home agency host week. Out of office time is spread across the second and third quarters of the year, and no more than one week per month is spent out of the office. In addition, participants will require up to three additional full-time weeks (120 hours) of work to process what they have learned, prepare for site visits, work on their business project, and participate in distance learning activities.

[1] Represents initiation fee and membership dues for program year 2019. Program fees and funding subject to change

REPORTING

PARTICIPANT EVALUATION

Early in the program's history, participant evaluations of content and substance have been collected and used to adjust and improve the program as needed, and report program value to agency executives. In the 2018 program cycle, the evaluation process was transitioned to an electronic process (paper forms are available on request). Based on wide-spread feedback on the topics and structure of evaluations, program year 2020 will utilize a revised evaluation focused on program *impact* and the extent to which participants may find the program content to be real-world applicable rather than on subjective, anecdotal assessments. These changes should improve the speed at which Eno is able to process and report performance ratings, and better inform the effectiveness of program planning by measuring distinct performance indicators.

The evaluation methodology measures each daily session and the overall objective assessment of the program, including networking events. Participants are expected, and strongly encouraged, to rate the effectiveness and applicability of information obtained at the end of each day via their mobile devices, tablets, or laptops. Evaluation compliance is a required program component because it enables Eno and agency staff to actively gauge whether topics, content, and engagement is at the right level to support participants' needs as they work on business projects and make the most of every agency visit.

Evaluations are identity-optional, although participant names are encouraged to facilitate the necessary follow-up when feedback has been acted upon. In general, it is expected that participants will exercise confidence when providing their names on evaluations given the collaborative nature of the Eno/MAX program, and the degree of trust, talent, and leadership investment supported by the agencies and the Eno team.

HOST WEEK EVALUATION REPORT

Within two weeks of the end of the Agency Visit, the Eno Facilitator will have a report of the evaluation forms compiled for the Agency. In previous years, the Host Agency has used this information to report to the Executive Team, identify areas for improvement and give feedback to the speakers and moderators that participated in the program.

END OF YEAR EVALUATION/COMPASSION REPORT

The Eno Facilitator will provide a comprehensive report following the last Agency Visit. This report will compile the participant evaluation data from each of the Agency Visits within the Group and compare this program year to last program year where applicable.

GM/CEO YEAR-END REPORT

The Eno Leadership Team prepares a final report for the Agency GM/CEOs and executives detailing the Program year accomplishments, fiduciary management, program improvements, expansion plans, and overall agency performance ratings. Input is gathered from the GM/CEOs on whether the program remains aligned with agencies' strategic model approach, is providing value, and is topically relevant.

EXPANSION STRATEGY

EXPANSION 2020

We are proud to welcome the Port Authority of Allegheny County as the ninth Eno/MAX agency member. The Port Authority completes over 62 million rides per year and is multimodal, providing service delivery via bus, light rail, funicular, and paratransit.

EXPANSION GOALS 2021-2024

Plans are underway to expand the Eno/MAX program in ways to strategically integrate agencies that would be well-matched to the program and its stakeholders. Eno has identified the following agencies for potential 2021 (and beyond) membership:

- SEPTA
- MBTA
- CTA (Chicago)
- MTA
- Houston Metro
- TriMet
- NJ Transit

APPENDICES

APPENDIX 1: MAX AGENCY MEMBER TIMELINE

History 2012-2020		
2012 2013	DART LACMTA (LA METRO) RTD	Original 3 Agencies
2014 2015 2016	DART LACMT A RTD MARTA	Expands to 4 agencies with the addition of MARTA in 2014
2017	DART LACMT A RTD MARTA Eno Transportation Center (Eno)	Eno Center for Transportation becomes partner and collaborator
2018	DART LACMT A RTD MARTA Sound Transit Valley Metro	Expands to 6 agencies with the addition of Sound Transit (Seattle) and Valley Metro (Phoenix) Cohort split into 2 groups of 24
2019	DART LACMT A RTD MARTA Sound Transit Valley Metro CATS WMATA	Expands to 8 agencies with Charlotte Area Transit System and Washington Metropolitan Area Transit Authority Cohort split into 2 groups of 32
2020	DART LACMT A RTD MARTA Sound Transit Valley Metro CATS WMATA PAAC	Expands to 9 agencies with Port Authority Allegheny County. Cohort split into 3 groups of 3 for equity.

APPENDIX 2: PROGRAM YEAR ELEMENTS

SAMPLE

Program Elements (Draft 2019)		
Elements	Year Program	Each Agency Visit
Presentations	44	11
Field Trips*	36	8-10
Meal/Breaks	32	8
Business Projects & Peer Networking	12	3
Required Networking	12	3
Senior Executive	8	1
System Overview	4	
Keynote	TBD	TBD
Eno Content*	20	4-6
Total	**168**	**43**

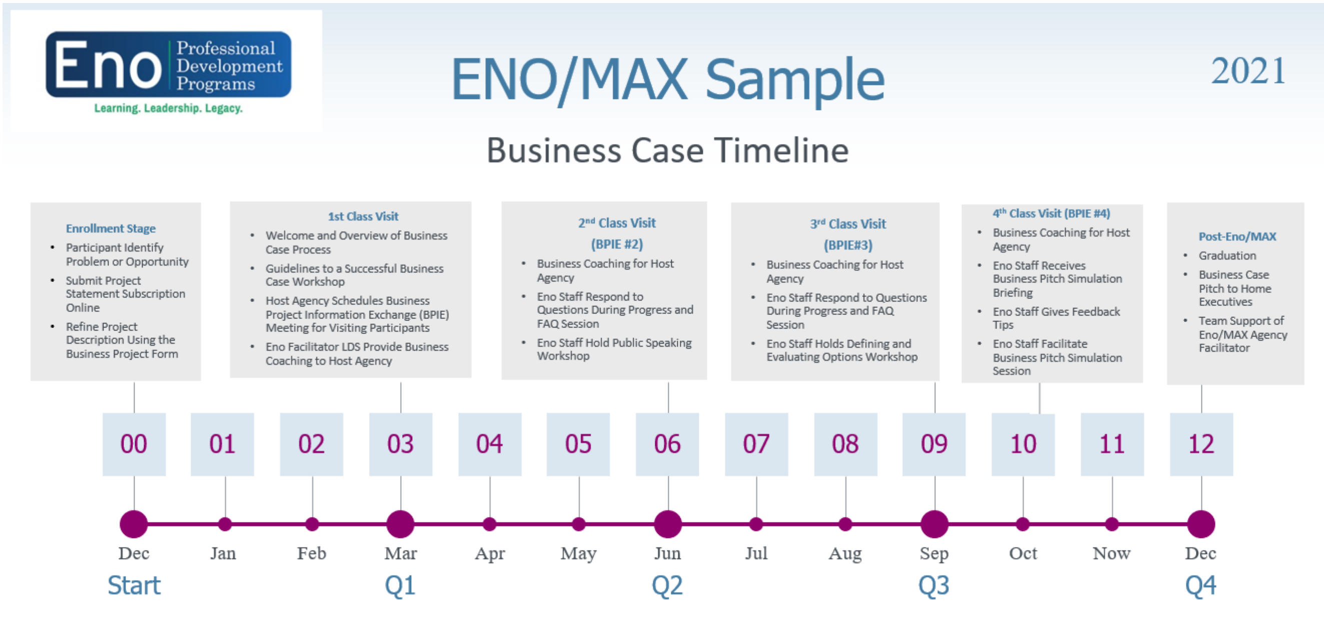
**2nd and 3rd Agency Visits will have 8 hours for host agency tours and visits field trips- the 2 missing hours will be used for Eno Content increasing Eno hours to 6 for those visits*

APPENDIX 3: SAMPLE DRAFT PROGRAM YEAR AGENDA PLAN

Eno/MAX Agenda Session Draft 2018 (Group A)		
DART	**LA METRO**	**Sound Transit**
	Presentations	
OPS Bus OPS General	OPS Bus Ops	OPS Business Model
OPS Electra Bus Rollout	OPS Bus Maintenance	OPS Business Model
OPS Rail Ops General	OPS Rail OPS	OP Sounder
OPS Rail Ops TBD (Tram Car ?)	OPS Rail Maintenance	OP with Tour TBD (On train)
Safety Occupational Safety/Lost Time Prevention	Safety Occupational Safety, Safety Culture, SMS	Safety Design and Facilities
Human Resources Succession and Leadership	Human Resources Talent Pipeline, school, WIN, Human Capital Dev	Finance Strategy Revenue Debt Strategy Beyond the Mix
Finance GO Pass	Planning Measures M/R	Government Affairs (External Relations) TBD
Capital Projects and Planning Rail Expansion	Communications TBD	TOD with ST3
Communications Security Campaign Police App	Security Homelessness & LAPD Contract	Capital Planning TBD
Leadership Skills Training Leadership Skills 7 Pillars	Finance Innovative Procurement	Facilities Sustainability and ISO
Elective 5 Star Program	Elective Senior Leadership Contract, Competency Mapping, Leadership Competencies and Ethics	Leadership Skills Training Skills 5 Dysfunctions
Elective Organizational Performance DOE Breakouts	Elective History 65 years of LA Metro	DBE Project Labor Agreements

Elective P-Card	Elective Breakouts IT Security, Civil Rights, Environment, Asset Management	Security Theft/Crime Prevention/Environmental)
Tours		
DART Police	Union Station	Bus/Rail Tunnel
Bus Tour	Maintenance Robotics	Sounder (early morning)
Rail Tour	Bus Maintenance	Engineering Innovations and TOD
	Santa Monica Tour	

APPENDIX 4: BUSINESS CASE TIMELINE



Enrollment Stage (Prior to 1st Agency Visit)	
Problem Identification	You will identify a problems or opportunity that you will work on as your Business Project[1] throughout the Eno/MAX program year Business Projects will be approved as designated by your Agency including: your department management, Agency Facilitator and/or Senior Team
Business Case Description	Agency Facilitator will describe the Business Case plan and exceptions during your internal orientation Eno will further detail the overall Business Case process including business project, terms, definitions, desired outcomes, forms,

[1] Participants work on defined business projects throughout the Eno/MAX year with the end goal of developing a robust business case by the end of the program year, ready to be presented before agency executives. Information from the business project makes up, or informs, the overall business case.

	and next during the Welcome Webinar
Refine Description and enroll	You will be required to access the Business Project and Program Enrollment Forms online through the Eno website and complete all fields/questions
1st Class Meeting	
Business Project Description	Eno will deliver a **Welcome** Webinar which will include an overview of the Business Project activities including expectations and timeline
Business Case Training	Eno will deliver the Guidelines to a Successful Business Case Workshop in the first few days of this visit. Key points of this workshop are: ● **Business Project Worksheet** ○ Business Problem/Opportunity Statement ○ Current Situation Analysis ○ Research Plan ○ Evaluation of Options ○ Recommended Path Forward During this workshop, you will refine you Problem Statement and begin work on your Situation Analysis and Research Plan sections of the Business Project Worksheet
Business Project info Exchange	Based on your business project description and problem statement submitted online; you will be paired with a resource from the Host Agency (Business Project Information Exchange -- BPIE). This invaluable resource will be able to provide you with information, direction, best practices and data related to your Business Project (or Opportunity). Refer to questions that you included in your Research Plan. Begin collecting relevant information and data at this meeting.
Business Project Coaching	While visiting participants are meeting with subject matter experts for the BPIE at the Host Agency, participants who are employees at the Host Agency will have a Business Project Coaching session with the

	Eno Facilitators (LDS). The Eno Facilitator will assist you in fine-tuning your problem statement, developing questions for your interviews at the next agency visit, and providing general advice on the direction of your Business Project. It is expected that employees at the Host Agency would have met with the relevant subject matter experts outside of the Host week. This time is best used to obtain additional coaching and to check in on Business Project progress. **Eno Website** Business Project Worksheet and Annotated Business Project Worksheet
2nd Class Meeting	
Business Project Info Exchange	BPIE #2- Based on the descriptions of your business project problem statement submitted online, you will be paired with a resource from the Host Agency (Business Project info Exchange-- BPIE). This resource will provide you with information, direction, best practices or data related to your Business Problem (Opportunity). Refer to questions That you include in your Research Plan. Continue collecting relevant information and data at this meeting. Collect additional relevant information and data.
Business Coaching	Participants from the Host Agency will have a Coaching session with the Eno Facilitator. The Eno Facilitator will assist you in fine-tuning your project statements, developing questions for your interviews, and providing general advice on the direction of your business case.
Progress and FAQ	Eno will conduct a short Question and Answer session with participants to gauge progress and clarify any concerns they may have.
Public Speaking Workshop	**Eno will deliver the** Public Speaking Workshop to provide general cues and strategies on speaking in front of grieves as

	well as specific hints for delivering your Business Case simulation page at the last Agency Visit in preparation for your presentation to your Senior/Executive team after the program. The purpose of the training is to assist you with honing your skills for a super-polish presentation.
3rd Class Meeting	
Business Project Info Exchange	SPIE #3- You will be paired with a resource from the Host Agency (Business Project Info Exchange -- BPIE). This resource will be able to provide you with information, direction, best practices, or data related to your Business Problem (Opportunity). Refer to the questions that you included in your research plan. Continue collecting relevant information and data at this meeting. Collect additional relevant information and data.
Business Project Coaching	Participants from the Host Agency will have a Coaching session with the Eno Facilitator. The Eno Facilitator will assist you in fine-tuning your project statements, developing questions for your interviews, and providing general advice on the direction of your business case.
Progress and FAQ	Eno will conduct a short Question-and-Answer session with participants to gauge progress and clarify any concern participants have.
Defining and Evaluating Options	Eno Staff will provide a workshop on defining and evaluating options. It is important to use appropriate criteria when evaluating options and include a full range of options. This section of the Business Project Worksheet is especially important in providing your executives with enough information to decide on whether to implement your recommended option.
4th Class Meeting	

Business Project Info Exchange	BPIE #4 - You will be paired with your final resource from a Host Agency (Business Project Info Exchange -- BPIE). This resource will be able to provide you with information, direction, best practices, or data related to your Business Problem (Opportunity). Refer to questions that you included in your Research Plan. Continue collecting relevant information and data at this meeting collect additional relevant information and data.
Business Project Coaching	Participants from the Host Agency will have a Coaching session with the Eno Facilitator. The Eno Facilitator will assist you in fine tuning your project statements, developing questions for your interviews, and providing general advice on the direction of your business case.
Pitch Guidelines	Eno Facilitators will deliver training on the Pitch Simulation exercise as well as Giving Feedback, as you will be providing feedback to your teammates during the Simulated Pitch. And it is a good skill to practice as a leader.
Pitch Simulation	You will deliver a timed, 5-minute pitch of your Business Case to a real guest CEO or VIP in a mock pitch or simulation. After you present your case, you will respond to questions from this CEO about your Business Case. The CEO wild debrief by giving you advice on both content and delivery.
Post Eno/MAX	
Business Pitch	With the tools, skills and information obtained throughout your program year, and with the feedback from your pitch simulation, you will polish and fine-tune your Business Case and work with your agency MAX Facilitator to schedule time with your executive leaders at your home agency to formally present your proposal. Then get ready for the possibilities.

APPENDIX 4A: BUSINESS CASE GUIDELINES

Pre-Class

At least **eight-ten (8-10)** weeks prior to the start of the first program week, all business projects should be identified, documented, and approved. This gives the host Agency Facilitator enough time to review the projects and identify and schedule appropriate staff to aid the participant.

Tasks	Responsibility
1. Identify and select specific Business Project	Participant
2. Complete initial *Business Project Form* (part of Online Enrollment process) describing the problem/opportunity that will be worked on	Participant
3. Review Business Project with Agency Facilitator	Participant and Agency Facilitator
4. Revise *Business Project Form and submit* final approved document	Participant
5. Obtain Agency Approval of Business Project and notify Participant	Agency Facilitator
6. Complete *Business Project Matrix* and share with all Agency Facilitators	Agency Facilitators in coordination with ENO Facilitator
7. Agency Facilitator at each host Agency will identify appropriate staff and other resources to support participant Business Projects	Agency Facilitator
8. Schedule Business Project Meetings (coaching, program structure and expectations, level of commitment required, etc., with appropriate staff and specific participant (1-2 hours)	Agency Facilitator

During Agency Visits

Throughout the program year, participants are expected to independently work on their projects. At each of the Agency Visits, participants will have the opportunity to do a deeper dive on their project with assistance from selected staff at the host property. Local (host property) students will receive coaching from the Agency and ENO Facilitators during this time.

Visiting Participants
9. Participants will meet with staff identified by the Host Agency Facilitator to conduct interviews and collect resource documents as requested

10. Document meetings and catalog resource documents (if applicable)
Host Agency Participant
11. Participants will meet with ENO Facilitator (and Agency Facilitator) for a Coaching Session which will include a review of individual business projects, and discussion of progress, ideas, obstacles, changes in course and suggestions
12. Participants will revise their Business Project Statement if applicable and note recommendations

All Participants
13. Prepare a five-minute Business case presentation for presentation at the final Agency Visit
14. Simulated business case presentations and feedback

During ENO Content Sessions (Training)

At designated Agency visits, Eno will provide Business Project/Case workshops. Participants will attend a Business Case workshop and other skills training that will help them prepare a polished and coherent Business Case for their projects. During the last Agency visit, the participants will present Business Case simulations before guest/mock CEOs (many of whom are or were GM/CEOs).

Task	Responsibility
15. Schedule and deliver *Business Project Overview* during the Orientation Webinar, including. a. Business Project Process flow for the entire program year b. Objectives and goals c. Terms and Definitions	Eno Facilitator
16. Deliver *Business Project/Case Study Workshop* during first Agency visit, including: a. Conducting Interviews Hints b. Business Project vs. Business Case c. Mechanics of doing a business case d. Framing your project using the Business Project/Case Forms as roadmap for interviews and collecting data e. Provide participants with Business Project/Case examples (Fact Sheets)	ENO Facilitator

17. Deliver short follow-up training at subsequent Agency Visit including: a. The CEO/Executive use and value of business cases b. respond to participant questions	Eno Facilitator

Post-Program Weeks

The participants will present their business cases to executive/senior management as determined by the organization.

APPENDIX 4B: BUSINESS CASE COACHING TALKING POINTS

The goal of this coaching session is to provide structured time for participants at the host property who will not have a **Business Project/Case Information Exchange Meeting** scheduled. This time will allow the Eno Facilitator to support participants as they refine their problem statements, prepare questions they intend to ask at the next Agency visit's **Business Project/Case Information Exchange Meetings**, determine data needs which will support their business case, and begin work on their "elevator pitches." The format of the session will be conversational, allowing participants to ask questions, use one another as resources, and have time to work individually. If the participants have already had a Business Project Information Exchange Session, ask how it went, allow them to identify concerns, and let them guide the conversation.

Objective	Discussion Points	Activity
Clarify Business Project Statement	Be able to explain project in a few sentences	Each participant will share their Business Project Statement Participants ask questions of one another
Describe what it will look like if the business case is successful	What do you want to accomplish? • Savings • New product/program/process • Increased Efficiency	Open Discussion Time for each student to document ideas from the discussion
Prepare for Business Project Information Exchange	• Take the lead • Have questions prepared (and follow-up questions) • LISTEN • Take notes	Participants document core questions to ask at the Business Project Information Exchange
"Elevator Pitch"	Key points of your business case What does the agency gain from implementing your business case	Participants work individually to start documenting the key ideas to include in their elevator pitch
Plan Follow-up Build your network	Send a Thank-you note or email At the end of your meeting discuss follow- up call and on-going communication	

Individual coaching	Brief discussion with each participant to answer individual questions	Participant questions

Potential Resources participants may use as part of their analysis

- Interviews with subject matter experts
- Data (identify time, specific criteria)
- Reports (annual reports, financial reports, safety, OTP reports, etc.)
- Marketing Materials
- Drawings/Plans
- Policies/Procedures

Potential Outcomes for the Business Project

- Business Case Analysis
- Business Report (White Paper)
- Business Presentation
- Data Analysis
- Revised Policies and Procedures
- Recommendations
- Short or Long-term projects
- Capital Projects
- Procurement Action(s)

APPENDIX 4C: BUSINESS CASE FOLLOW-UP (ANNOTATED)

Business Case Follow-Up Form
Participant Name
Problem Statement ● Clear Statement of problem or opportunity being addressed ● Identifies key issues to be addressed
Situational Analysis- *What are the key factors that need to be thought about and considered* ● Detailed information consistent with opportunity statement and alternatives ● Background and history ● Perception of current state ● Projection from current state ● Work that may have already been done ● Financial analysis
Options ● Identify all potential solution options with sufficient detail including no action ● Identity critical assumptions
Evaluation of Options- *Largest part of the document answering most of what, why, and how questions of the project* ● Complete definition of options ● Key decisions criteria ● Benefits/costs ● Ensure affordability ● Operational and customer impacts ● Required resources ● Organizational capability ● Key Interdependencies ○ Completion of other projects ○ Availability of key personnel ○ Risks associated with failure interdependencies ● Identifies area impacted ● Own department ○ Who is responsible for project implementation? ○ Major schedule milestones

APPENDIX 4D: BUSINESS CASE FOLLOW-UP FORM

Business Case Follow-up Form
Participant Name
Problem Statement
Situational Analysis
Options
Evolution of Options
Recommend Pathed Forward

APPENDIX 4E: SAMPLE BUSINESS CASE

Title or Cover Page

A very brief front cover description of what is being presented. Consider including on the Title or Cover Page of these suggestions:

- Title of the document, should include the project name
- Subtitle of appropriate to add clarity to the main title
- Presented by author(s)
- Prepared for (Audience)
- Versioning Page- *May be appropriate on complex project documents requiring a comprehensive review process that result in multiple document revisions. Small or less complex projects may not need a version page*
    - If a versioning page is considered necessarily, information may include
    - Original creation date
    - Version or edit dates
    - Summary of revisions or corrections, by whom
    - Additional comments as appropriate

Executive Summary

A concise high-level summary version of the entire report. How well this is written will influence the readers to read your report detail. These should be included in the Executive Summary:

- Opportunity description
- Desired outcome
- Major factors
- Required resources
- Expected Return on Investment (ROI)
- Proposed timeline
- Include your sections in the same order as the full report. This helps the readers quickly find their areas of interest in the document
- This is usually prepared after the full document is created to align with high impact points

Table of Contents

- Provides the reference structure for the main content elements
- Is usually written after the document is complete
- Recommended to keep to no more than one page

Opportunity Statement

- Clear statement of opportunity or business problem being addressed
- Identifies key issues to be addressed

Situational Analysis

- Detailed information consistent with opportunity statement and alternatives

- Background and history information
- Perception of current state
- Projections from current state
- Work that may have already been done

Solution Options

- Identify potential solution options with sufficient detail
- Identify critical assumptions

Evaluation of Options

Contains the evaluation relative to the key criteria. Answers what, why, how, and who

- Key decision criteria
- Costs and benefits
- Operational and customer impacts
- Required resources
- Organizational capability
- Work needed to deliver objective
- Key interdependencies
- Completion of other projects
- Availability of key personnel
- Risks associated with failure of interdependencies
- Identify areas impacted
- Own department
- Other internal departments
- External entities
- Financial Analysis - Key component of the evaluation
    - Include associated costs and benefits for each option, including no-action scenario
    - Consider every associated cost
    - Affordability of project and predicted Return on Investment (ROI)
    - Identify predicted budget and cash flow implications
    - Include level/degree of confidence in these estimates

Recommendations

- Summarize your recommended option
- Explanation of supporting reasoning
- Identify next steps
- Who is responsible for project implementation?
- Major schedule milestones
- Possible project staging

APPENDIX 5: BUSINESS PROJECT STATEMENT

Business Project Worksheet (EXAMPLE)
Business Problem/Opportunity Statement As public transportation vehicles become more technically complex, our maintenance staff are increasingly confronted with maintenance and repair situations for which they have not been adequately trained or prepared. These situations can lead to longer vehicle downtimes, reduced capacity to transport our constituents in a timely manner, and higher fleet maintenance costs. This study will investigate how other agencies identify, deliver, and track key training requirements and certifications; how new employee skills gaps are identified and addressed; what training methods are used to keep staff competencies current with industry advancements; and what are the most effective training management systems available. The intent of this project is to create an agency plan to elevate our training programs to address our issues.
Situation Analysis
Research Plan
Evolution of Options
Recommended Path Forward

What is the Problem?

What is the Desired outcome?

APPENDIX 6: FAQ FOR PEER NETWORKING SESSION

About

Is a technical and leadership program that is founded on peer learning. Transit properties from around the country participate in a year-long program of site visits. Each agency that participates hosts the class once a year. One of your colleagues is designated as the *Agency Facilitator* for your agency's host week. That person arranges a series of sessions, tours, and small group information exchanges. One of those information exchanges is called *Peer Networking*

What is the Peer Networking Session?

Learning from peers is a core principle of the Eno/MAX program. At each class meeting, or agency visit, participants meet with people from the host agency who may have a similar job title, function, or duty portfolio to their own. The participant and the host personnel are peers. The purpose of the Peer Networking session is to promote inter-agency collaboration among personnel who operate in similar work scopes. When employees meet others, who share a particular area of interest or passion, a unique bonding, shared understanding, and deep intrapersonal connection often occur. The Peer Networking sessions are not intended to inform specific business projects necessarily but, alternatively, to simply foster an authentic connection between two or more transit professionals who share similar passions.

The Agency Facilitator assesses and coordinates plausible peer connections and will schedule time for the two (or more) to meet during the agency visit. The Peer Networking session is an unstructured 60- 90-minute meeting, often coordinated over lunch to enhance the informal, conversational, and authentic intent of the meeting. Again, the primary purpose of the session is not to exchange business project information, though this typically happens, but to serve as a powerful way to build a sustainable network of industry professionals.

Why was I selected to participate?

You have been selected because you are a high performing employee whose job portfolio is like a participant. You are in the best position to give the participant expert, inside information on your agency's practices, policies, and customs. The information you provide will help the participant to tackle important business problems by bringing new ideas back to their agency.

Further, the Agency Facilitator wants to give you the opportunity to meet people outside your agency. This helps form an informal network of professionals who can share best practices well after the class is complete.

What will happen at my meeting?

You will have an informal discussion with the participant(s). If the session is scheduled at a mealtime, food may be provided. Be prepared to give the participant a 5–7-minute overview of your background and current position's duties. If you have deployed any new or innovative ideas recently, these will be of interest to the participant. The participant will have several prepared questions for you, may ask to receive copies of manuals, policies, or technical specifications.

Some Peer Networking conversations are best conducted in the field. A short tour will most likely be appreciated by your peer. This is not required, but feel free to bring the participant to your duty station.

If your duty station is at a different facility from the scheduled meeting room, contact the Agency Facilitator for guidance on travel schedules.

It is fine if the conversation winds down before the formal conclusion of the session—this is a common occurrence. Simply exchange contact information, thank your counterpart for their time, and return to your regularly scheduled activities.

APPENDIX 7: GUEST SPEAKER TIPS

1. Prepare:

When we prepare for our presentations or speeches, most of us think—Write it/ Practice it. True enough, but there is more to it if you genuinely want to engage, influence, or even dazzle your audience. Before putting pen to paper, ask yourself.

a) What is the audience's predominant demographic, social, gender, political, financial, even philosophical make up? What else do you know about them?
b) How will your topic and delivery impact these people directly?
c) What do the participants gain by listening to your speech? What is in it for them? What are the top 3 key takeaways? What stories can you tell to bring the 3 key points to life?
d) Understanding that people are moved to act by connecting to their emotions and then use facts and data to back up their decision. What is your emotional hook? Do you have powerful facts, stats, data quotes, or case studies?
e) What exactly do you want the participants to do, think or feel when you are finished?
f) What are the actual benefits to the knowledge you are imparting? Remind yourself that *your* opinion of what is important is secondary to the perceived needs of the listener.

The great orator Cato, when asked about the secret of his powerful talks to the Roman Senate, said: "Find the message first and the words will follow."
Answering the above questions aligns your presentation with the needs of your audience, gives you the ability to customize, and makes it relevant and interesting to this group of people.

2. The Power Opener

The old saying about having one chance to make a first impression is decidedly true in presentations. Here are some Do's and Don'ts:

Do.

Intrigue your participants with a story, a powerful quote, a startling statement, parable, or statistic. Frederic Douglas African American social reformer, abolitionist, orator, and a friend to President Abraham Lincoln opened a speech on July 4, 1852 like this:
"Pardon me – why did you ever invite me? When I, and the people I represent have no reason to celebrate this day." That is how you open a

speech! He then went on to make a powerful case for incorporating all free people and slaves into the fabric of America. The participants can't help but stop and think about the speaker after hearing such a powerful and personal statement.

Do not.

Open with the usual pleasantries of thanking the host, telling the participants what a pleasure it is to be there, etc., blah, etc. You will get to the point where thanking is both appropriate and much more powerful than by opening with it. It is too expected and consequently allows your participants' minds to begin to wander before you are even two minutes into your address.

Do.

Once the opening story /quote / or analogy is told, you can end it with" and what this has always meant to me is," or "this story is important because," or "what (person from story or yourself) learned from this experience was this (insert learning here) and I can't think of a better way to open the topic of X. But first let me thank my hosts…".

There are many powerful openings that are sure to get your audience's attention and interest. That is the point of the opener. **Remember you only get one chance to make a first impression.**

3. The Middle

Winston Churchill: arguably one of the finest speakers in modern history used to say that "a good speech is like a symphony, it may have three movements (open, middle, close) but it must have one dominate melody." Once your opening has drawn the participants in and you have their attention, here is where you do your persuading and have them think, feel or do. What is your plan?

Do.

Throughout your speech, consider your non-verbal communications. Speak up! Move! Engage your audience's eyes. Pause to allow your point to sit in their minds a bit. There is an element of theatre in speaking. You certainly can incorporate these nonverbals without losing your authentic self. While most audiences will sniff out inauthenticity, mannerisms can either work for or against you and can result in you not being taken as seriously as you would like. Striking the balance between bringing your true self while using non verbal, is the recipe for capturing the participant's attention.

Consider this picture:

Let me ask you your impressions…

Is he nervous?

Is he prepared today?

Does he believe in his material? Himself?

Is he competent?

Of course, we cannot know for certain but if we are being honest, 99% of us would say yes. Why? Because everything about him appears to say, “am ready, I am poised, I am confident, and I believe in my subject”. A UCLA study found that human perceptions are based on three key elements—

Visual impressions (How someone look and acts),
Visual impressions (How someone’s voice sounds) and a lesser degree the
Verbal impressions, (the words they use).

Power stats and facts:
As mentioned earlier; how are you backing up the key points to your topic? Do you have powerful statistics, facts and/or data?
In the days before trillion-dollar deficits, then President Eisenhower was searching for a way to explain to the American people the enormity of a *billion-dollar* deficit. He did it this way in a speech. “To understand the billion-dollar deficit, imagine taking a billion-dollar bills and laying them end to end.
Why, it would more than stretch to the moon (pause) and back.” That is an impressive visual and made his point beautifully.

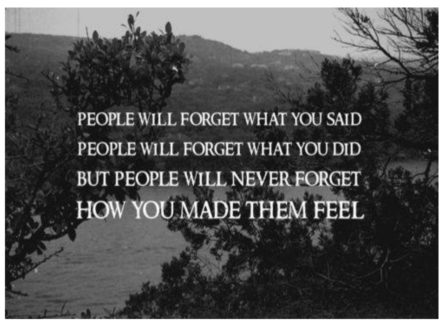
I also like to ask myself before a speaking engagement whether I am most seeking **credibility** or
memorability with my audience.

Credibility is established by conveying your knowledge, expertise and experience on a given topic. To amplify your point, consider sharing important takeaways with

a bit of flourish and theater. For example, at the point of producing a key statistic, I pull out a card or go to a piece of paper and read it, pause, and say, "This year's profits are up 52.4%."
OR
We reduced our accidents from 1 per 124,456 miles driven to 1 per 342,765. Pause for 3,4,5 seconds to let it sink in and then continue. Your participants will not remember the exact number, but they will remember it was significant. It is the exactitude of the data that gives it credibility.

Memorability is better established by appealing to the emotions of the audience. For example, in explaining to my audience the importance of not leaving 30% behind in their education, I used a quite simple slide. On the slide there were three children, all beautiful and full of promise. I simply turned to my audience and asked them to choose which child gets left.

4. The Power Close:
Many fine presentations have been left somehow dissatisfying due a weak or non-



descript close. In many cases this is the memory that seals the deal on your message. Maya Angelou said: Consider using stories that inspire or borrowing phrases or quotes that depict a point. I have quoted King, Kennedy, my Captain in the ARMY and an old man who taught me a great lesson.

Engage the participants not just intellectually or emotionally but physically by getting them up or creating audience interaction. For example, to incite introspection, I have asked audiences to stand and look at each other as I explain that each of us has our stories of courage which has made us plenty strong enough to face the challenges that lie ahead for the company/group. End strong and powerfully and you will be remembered.

Finally, so that there is no doubt in the audience's mind that you are done with your presentation, finish by looking at the participants in the eyes and saying, my name is, and it has been my pleasure to spend this time with all of you. Goodnight or Good day or Goodbye.

APPENDIX 7: AGENCY FACILITATOR READY REFERENCE GUIDE

A. Orienting your cohort

Agency Facilitators are the coordination and communication directors of the MAX program. They are the glue that will bind the program together within each agency, as well as with the other participating agencies. They must coordinate meetings, events, and constant communication with participants at their home sites to ensure participants are prepared and engaged throughout the program.

B. Facilitator Conference/Program Year Planning

During the fall of every year, Agency Facilitators, and other designated personnel from the agencies, in addition to the Eno Facilitators and staff, meet at the Facilitator Conference to plan the following year. At the Conference, both the MAX program topics and MAX program elements are discussed; a high-level agenda is then agreed upon for each property. This is done to ensure adherence to the MAX learning objectives, in addition to allowing each site to highlight unique or prioritized items. It is also used to minimize duplication of agenda items at the agencies. For example, if one agency has a new control center, a tour of that facility will be included in their agenda but will not be duplicated at the other agencies.

C. Leading your cohort

Communication is key and Participants will need their Agency Facilitators to direct the logistical details and provide them with the preparation details they will need to be successful in MAX. Participants are expected to complete Pre and Post Course work and are invited to participate in alumni activities. Facilitators will need to communicate between Eno and their Agency Participants to ensure they are clear on these activities.

D. Business Project Information Exchange

Collaboration and peer learning are the primary themes in the program's success. The Business Project Information Exchange embodies these qualities. The Exchange combines both a technical information exchange along with the facilitation of making new contacts. It results in significant benefits to agencies and the results of the Business Projects are highly valued by the agency CEOs. Agencies can approach the exchange through one of two models:

After admission to the program, each participant identifies a specific business problem that they want to resolve. The Agency Facilitator and Eno Facilitator will work with the participant to build a comprehensive, feasible business problem statement. Some CEOs or senior leaders may want to approve the participants' business problems.

The approved business problem statement is recorded on a form that is shared with all facilitators and may be made available to others. This worksheet provides them a chance to formulate a plan of how they want to approach the project as well as gives the facilitator crucial information needed when deciding on who to pair each participant with. At each property (except their own) they are then paired up with pre-identified subject matter experts--identified by the host facilitator--who can help them solve their problem. At least 1 hour should be reserved for one-on-one in person discussions. Outside of class, participants should be referred to knowledgeable persons on aspects of their Business Project. Remote communications should be arranged and encouraged.

At year's end, participants can formulate a solution to their problem for possible application at their home agency composing a Business Case for implementation (or status quo) based on their research throughout the MAX Program. The Business Case should be presented to senior management in written or verbal form. This approach provides streamlined solutions and a network of professional contacts from which to discuss future challenges.

E. Peer Network Session[2]

At each session, participants should be paired for at least an hour with someone who is in their role at the host Agency. If the role is not replicated at the host Agency, the Agency Facilitator should look for someone with a similar skill set and job functions. The Peer Network Session is an unstructured 60- minute meeting and may involve short visits to duty stations. The Agency Facilitator will work with the other facilitators (including Eno's) to locate appropriate peer pairings.

F. Logistics Planning (travel, meals, communication)

Each facilitator is responsible for planning the logistics for their Host Week. Details on what that entails are found below.

G. Sharing Information with Other Agency Facilitators

Participant information should be shared with the other facilitators including name, title, organization, office phone, cell phone, headshot, business case projects, dietary restrictions, formal name for certificate, and a nickname if they have one. Each facilitator should also share the hotel information with the other facilitators to enable making room reservations before the cut-off date. Draft agendas should be sent to all facilitators at least 2 weeks in advance.

[2]When the class visits the participant's home property; they are not able to participate in Peer Networking and Business Project Information Exchanges. During those periods on the agenda, the participants from the host property will have a group coaching session with the Eno Facilitator to discuss in detail the progress of their business project.

H. Hotel RFP (Request for Proposal) and Contracting

Once you have dates set, you will need to secure lodging for MAX participants. Hotels work on a request for proposal (RFP) system, so you should contact the hotel's sales staff to begin the process. Usually when you go on a hotel's website, there is a meetings section and that will allow you to contact the sales staff or submit an RFP. You can also submit your RFP to your city's local Convention and Visitors Bureau (CVB) to help you with your hotel sourcing. CVBs provide free services and will send your RFP to their hotel contacts. CVBs are also a good resource to help you plan any dinners or social events.

The RFP should include information on the size of your room block, pricing, and any extra items such as breakfast, Wi-Fi, and additional event space. The hotel selected for the program week should be appropriate for closeness to host Agency headquarters/facilities, cleanliness, meal accommodations, access to your Agency's transit modes, and amenities such as Wi-Fi. Usually, a 3- or 4-star hotel is preferred, but you also want to select and negotiate to get the best price possible. To determine pricing, the hotel government rate (per diem) for your city is a good place to start (gsa.gov).

The first offer you receive from a hotel is usually negotiable. You might want to negotiate complimentary breakfast for guest or Wi-Fi in the hotel rooms.

Some agencies have departments who handle travel and hotel contracting, or your Agency may have preferred hotels that you work with. If your Agency has a system in place, use that system. Also note, that if you have questions about hotel RFP and contracting, the Eno staff can assist you.

APPENDIX 7A: AGENCY FACILITATOR CHECKLIST

Pre-week

- ☐ Set the dates for your week
- ☐ Create an agenda
  - o Describe sessions and tours, duration, and locations
  - o Identify speakers, moderators, and tour guides
- ☐ Arrange speakers (moderators and tour guides)
  - o Send invitation with session topic in mind, as well as location, date, and time
  - o Schedule a pre-call/meeting to go over the details of session
  - o Ask speakers if they will have any sort of PowerPoint presentation or activity during their session.
- ☐ Reserve a hotel room block
  - o See sample Hotel RFP
  - o Try and get a hotel deal that includes breakfast
  - o Do you need any meeting space at the hotel?
- ☐ Reserve meeting space at your agency to hold the sessions
- ☐ Schedule audio visuals (AV) for your sessions
  - o Projector and laptop for PowerPoint
  - o Wi-Fi
  - o Microphone
  - o Communication devices for tours
- ☐ Arrange any catering for meals provided as part of the program
  - o Take into consideration any dietary restrictions/allergies of participants and make sure there is food for them
  - o Coffee, tea, bottled water, and soda should be available for most of the day or sessions
- ☐ Schedule any necessary transportation
  - o How are participants getting from the hotel to the agency office?
  - o How are you getting participants to the tours, social events, etc.?
  - o If you are taking public transit, provide the participants with preloaded fare cards
  - o Allot the proper amount of time to get places and include it on the week's agenda (Think about what time of day you are on the move. Is it during rush hour?)
- ☐ Obtain security clearance as required for any place you are visiting
- ☐ Materials
  - o Participant Name badges and Name tents (produced by Eno)
  - o Welcome packet materials

- Speaker bios
- Session handouts
- Host agency tchotchkes

During the Week

- Collect evaluations
- Keep group on schedule according to agenda timetables
- Come in early to clean and organize the room, as well as AV set-up
- Keep track of the catering and make sure the food arrives on time
- Check in with speakers so they know where and when their sessions are held
- Emcee or moderate sessions as needed
- Take photos of the group tours and sessions. Upload photos to the Eno website/portal photo gallery. These are great to use for marketing and social media specific to your Agency and participants enjoy seeing photo slide shows during breaks, at the start of the program days or as the week wraps up

Post-Week

- Send evaluations to Eno for processing
- Upload any speaker PowerPoint slides, handouts, or resources to the designated page on the Eno website for your host week.
- Upload any remaining program week photos to the Eno website.
- Send thank-you notes to speakers
- Prepare to have a debriefing with the Eno Facilitator to discuss the program week, takeaways, areas for future improvement and evaluation ratings and executive performance reports

APPENDIX 8: PARTICIPANT EVALUATION FORM*

The evaluation of this course is comprehensive, and your thoughtful comments will ensure the course remains topical and relevant. When considering your answers, think about what you learned in this session, how you can apply the learning to your project or job, and how the session and/or speaker(s) guided you through the topic. Please be specific with your comments. Rate the session using two scores:

1. **Content Score**: Evaluate the information presented during the session. Was the information or topic discussed helpful to you?
2. **Delivery Score**: Evaluate the execution of the speaker(s) remarks and presentation of the topic.

Please assign a number to the value and quality of the session. Use a scale of 1-5 with 5 being high.

Module	Value & Quality of Session	Comments
Welcome Speakers:	Content Score *(Scale of 1 of 5)* Content Score *(Scale of 1 of 5)*	Comments:
Session A Speaker:	Content Score *(Scale of 1 of 5)* Content Score *(Scale of 1 of 5)*	Comments:
Session B Speaker:	Content Score *(Scale of 1 of 5)* Content Score *(Scale of 1 of 5)*	Comments:
Session C Speaker:	Content Score *(Scale of 1 of 5)* Content Score *(Scale of 1 of 5)*	Comments:

APPENDIX 9: SAMPLE AGENDA

[Day of the Week]

Agenda [Host Agency]

Week

[City, State]

[Month, Day, Year]

[Time]	[Session Title, Speaker Title, Office, Session Location]
7:30am-8:00am	Breakfast
8:00am-9:00am	Session 1, Speaker Title, Office, Session Location
9:00am-11:00am	Session 2, Speaker Title, Office, Session Location
11:00am-12:00pm	Session 3, Speaker Title, Office, Session Location
12:00pm-1:00pm	Lunch
1:00pm-2:3 pm	Peer Network Session
2:30pm-2:45pm	Travel to tour location *(Participants will take bus to tour location.)*
3:00pm-5:0 pm	Tour, Tour Guide Name, Title, Office, Tour Location
5:00pm-5:15pm	Travel back to the Agency office. *(Participants will travel back to the agency office.)*
6:00pm-8:00pm	Networking Dinner, Location/Address *(Participants will meet outside the hotel at 5:50 pm to walk over as a group.)*

APPENDIX 10: PRE AGENCY-VISIT HANDOUT REQUIREMENTS

Welcome Package

Before each Agency visit, the participants should be given a handout with the below requirements. This should be sent at least a week in advance to facilitate learning and logistics before they leave for the visit.

1. Agency Overview
    a. Organization chart
    b. System facts
    c. Interesting facts
    d. Current major initiatives underway
2. Local Information
    a. Restaurants nearby
    b. Tourist hotspots
3. Logistics Information
    a. Instructions on getting to/from airport
    b. Instructions on getting to HQ from hotel
    c. Type of attire
4. Agenda
    a. Speaker position titles
    b. Placement in the Org. chart (if possible)
    c. Speaker bios (if possible)

APPENDIX 11 GLOSSARY

Business Case – the Eno/MAX program capstone deliverable; formal process for evaluating data, situation, and options for solutions to real-world business problems. Also, a structured format for organizing and presenting information. Business Cases are the justification, or the rationale, for why a business solution is warranted. A Business case may extend beyond the end of the Eno/MAX year as it may entail several distinct phases.

Business Project – the cumulative work performed by participants during the Eno/MAX yearlong program to research and develop a substantive and cohesive Business Case by the end of the program year. The Business Project uses information gathered during agency visits, observations of best practices, leadership skills training, and peer networking to innovatively solve a business problem or capitalize on an untapped opportunity at a participant's home agency. Business Projects have a distinct start- and endpoint (e.g., the start and end dates for the program year) with a clear deliverable and outcome, specifically, a successful Business Case pitch to senior/executive leadership leading to implementation of the participant's idea.

Participant Submits/proposes idea to solve a problem > Business Project during Eno/MAX > Business Case Development during Eno/MAX > Practice Business Case Pitch to Guest VIP > Business Case Pitch to Agency Senior/Executive Leadership > Implementation/Funding of Business Case

Agency Facilitator – personnel assigned by agency to serve as program administrator for day-to-day operations, Eno and participant primary point-of-contact for program coordination, and overseer to ensure program remains in compliance with program mission and administrative requirements.

Eno Facilitator (renamed as "Learning & Development Specialist," or "LDS") – Eno-provided personnel responsible for the "local" support to Agency facilitators in preparation for agency visits and program review post-visit. The Eno Facilitator provides participant business case skills and core skills training throughout the program, assist Agency Facilitators with program planning and reporting, deliver proactive leadership on program administration and communication, serve as subject- matter-expert on Eno-sponsored content, and provides ongoing expert coaching to participants on business case projects and leadership development.

Designed by transit agencies for transit agencies