



Council *of the* Great City Schools
The Nation's Voice for Urban Education

The Role of the Chief Officer: A Strategic Leader

Management Excellence Through Executive Leadership

Leadership & Management Task Force



Michael Eugene, Chief Operations Officer



I AM A

**CHIEF OPERATING
OFFICER**

**I SOLVE PROBLEMS
YOU DON'T KNOW YOU HAVE
IN WAYS YOU CAN'T UNDERSTAND**



KEEP CALM

and let the

CHIEF OPERATING OFFICER

HANDLE IT

**CHIEF OPERATING
OFFICER**

== WE DO ==

PRECISION

GUESS WORK

BASED ON UNRELIABLE DATA
PROVIDED BY THOSE OF

**QUESTIONABLE
KNOWLEDGE**

**CHIEF OPERATING
OFFICER**

BECAUSE

**BAD
ASS**

MIRACLE WORKER

★ IS NOT AN OFFICIAL ★

JOB TITLE



What Does YOUR T-Shirt Say?

What **SHOULD** Your T-Shirt Say?

Span of Control for Chief Officers is Diverse

- Curriculum
- Enrollment
- Support Programs
- Special Education
- Alternative Education
- Adult/Tech Ed
- Guidance
- Psych/Social Services
- Multilingual
- Professional development
- Research
- Charters
- Human Resources
- Employee Relations
- Labor Relations
- Communications
- Legislative Relations
- Media Relations
- Construction
- Planning
- Maintenance
- Custodial
- Code Compliance
- Finance
- Budget
- Risk Management
- Accounts Payable
- Grants Management
- IT Infrastructure
- Security
- Applications
- Project Management
- Device Management
- Help Desk
- Digital Curriculum
- Food Services
- Transportation/Fleet
- Police/Security
- Emergency Management
- Fire, Life Safety & Health
- Asset Protection
- Procurement
- Warehouse/Delivery
- Surplus/Salvage
- Records Management
- Print Services/Mail/Postage
- Environmental
- Sustainability

What is the Role of a Chief Officer?

The Chief Operating Officer's Job

Food Services

Transportation

District Police

Safety & Emergency Management

Procurement & Supply Chain

Environmental Compliance & Sustainability

Building Code Compliance



I run...

Food Services

Transportation

District Police

Emergency Mgmt

Procurement

Environmental

Code Compliance

The Chief's Job Description

- Develop **strategy** to support **execution** of the strategic plan
- Provide **leadership** that mirrors the mission and core values of the organization
- Develop and implement **policy** and ensure creation and use of **procedures**
- **Motivate and lead a high performance management team; attract, recruit and retain** required members; provide mentoring
- Lead **change management** and adaptation to new approaches
- Responsible for **driving the organization to achieve** goals and objectives
- Establish **management framework** for the alignment of common approach
- Responsible for the **measurement and effectiveness of all processes** internal and external
- **Forecast changes** on and **future needs** of the organization
- **Convene** cross-functional teams to work on **new programs and coordinated actions**



I am a Chief Officer

I develop focused strategy...

I lead through inspiration...

**I facilitate change through continuous
improvement...**

**I develop talent and shape their
path...**

**I maintain a management system to
focus on measureable outcomes to
achieve goals...**

**I look to the future to anticipate
changes and opportunities...**

**I lead by example by convening cross-
functional teams around a common
objective...**

CGCS Peer Review Findings

Leadership

- Focus on reactive tactical issues instead of strategic preventive approaches
- Implementation plans to carry out strategic priorities are largely absent
- Resources are not allocated to strategic priorities adequately
- Performance measures and benchmarks are not used to establish best practice reference points or continuous improvement
- No governance structure to coordinate strategic priorities or resolve conflict

CGCS Peer Review Findings

Management

- Crisis management distracts staff from priorities and preventions
- Collaborative and cross-functional decision-making is not used to create consensus from an enterprise vantage point
- “Silo” mentality is pervasive as there is no integrated framework from leadership
- Procedures and processes are not well documented nor followed
- There is no follow-up on priorities once launched
- Long standing practices are not challenged... We’ve always done it that way...

What's the Difference?

Leadership

Vs.

Management

“Managers are people who do things right... and leaders are people who do the right thing.”

~ Warren Bennis

A Mentor Once Said...

“What made you successful in the past... will cause you to fail in the future”

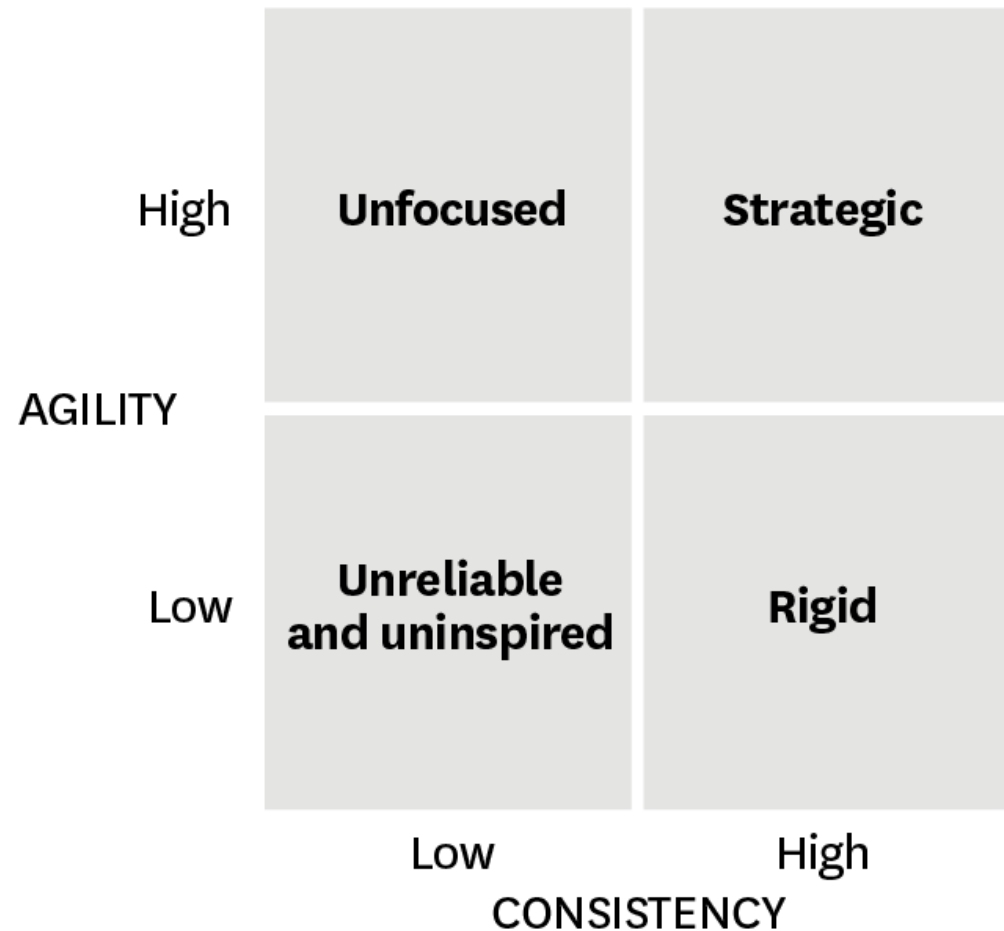
Therefore,

You can't do your old job in your new job and expect to be successful.

You MUST constantly learn and improve your leadership approach to be effective for your organization.



Strategic Leaders Must Be Agile and Consistent at the Same Time

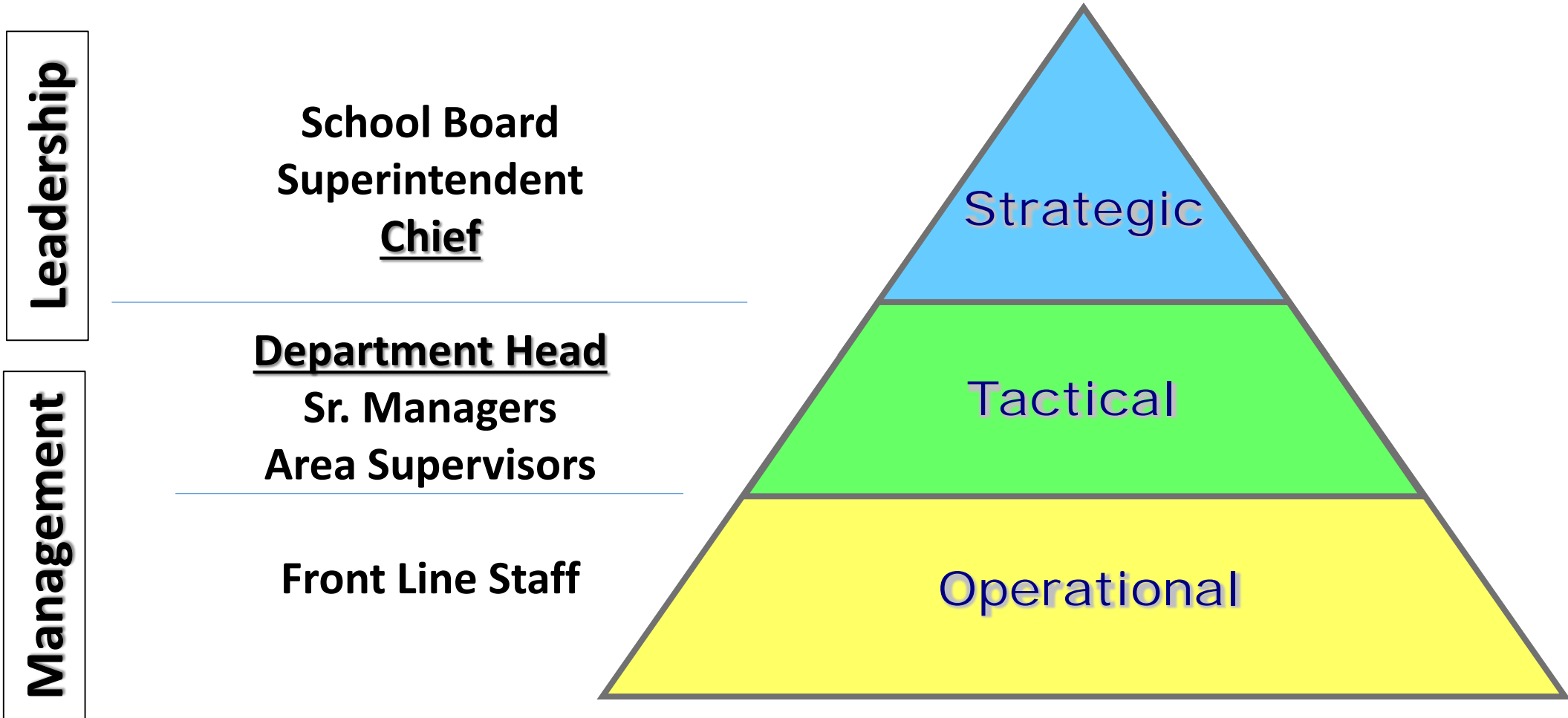


It's in the combination of consistency and agility that leaders can become strategic.

To ensure **consistency**, develop strong dashboards and balanced scorecards to assure outcomes are consistently reached and continually improving.

To assure **agility**, develop a planning model that allows the organization to change outside of the formal annual planning process and create an annual strategic planning process that looks outward to the external environment and forces the organization to contemplate big ideas.

Systems Management



Systems Management

Leadership

Strategic Leadership is responsible to **develop the strategies** and **craft the organization** to achieve the vision, and **shape the path** through a **management framework**.

Management

Tactical Management is responsible for **innovation, project and process management** to ensure strategies are implemented with **precision and fidelity** to achieve **expected results**.

Operational Staff is responsible for carrying out the operational responsibilities necessary to **achieve quality, efficiency and customer service**.

Chief's Role in Strategic Leadership of a System

- **Planning:** What are our strategic priorities? Where are there gaps that have to be addressed to achieve them?
- **Organizing:** What people, resources and information needed to achieve them? Who do we need collaboration with to succeed?
- **Leading:** How do we communicate vision and motivate buy-in to achieve it? How do we incentivize, recognize, coach people to ensure skill, focus and results orientation?
- **Controlling:** How do we set expectations, manage and course correct them to through a standardized tactical framework, using facts and data to ensure results?

The Tactical Center

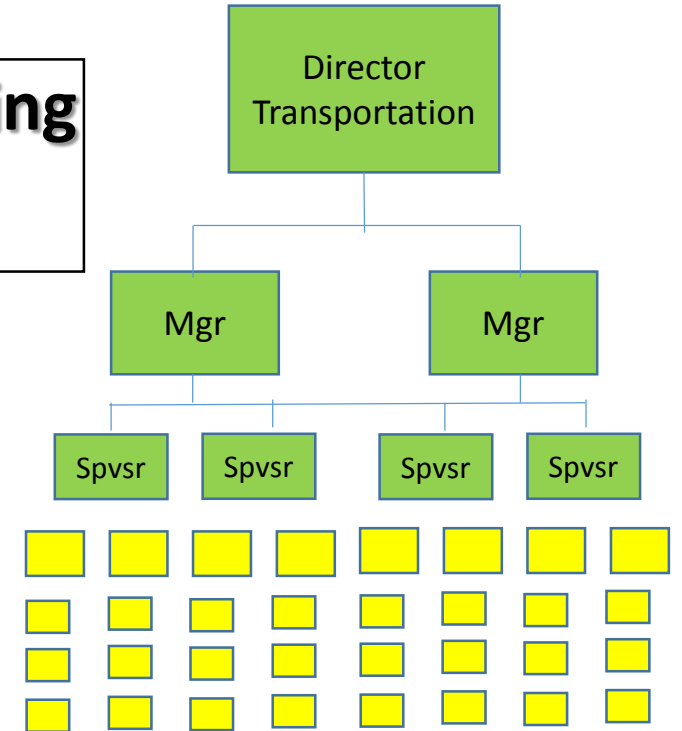


Tactical leadership Responsibilities

- Tactical Planning to Execute Objectives
- Hiring & Allocating Labor

- **Standard Operating Procedures & Process Mapping**
- **Project Management Implementation**

- Efficiency and Lean Management
- Monitoring and Oversight
- Data & Root Cause Analysis

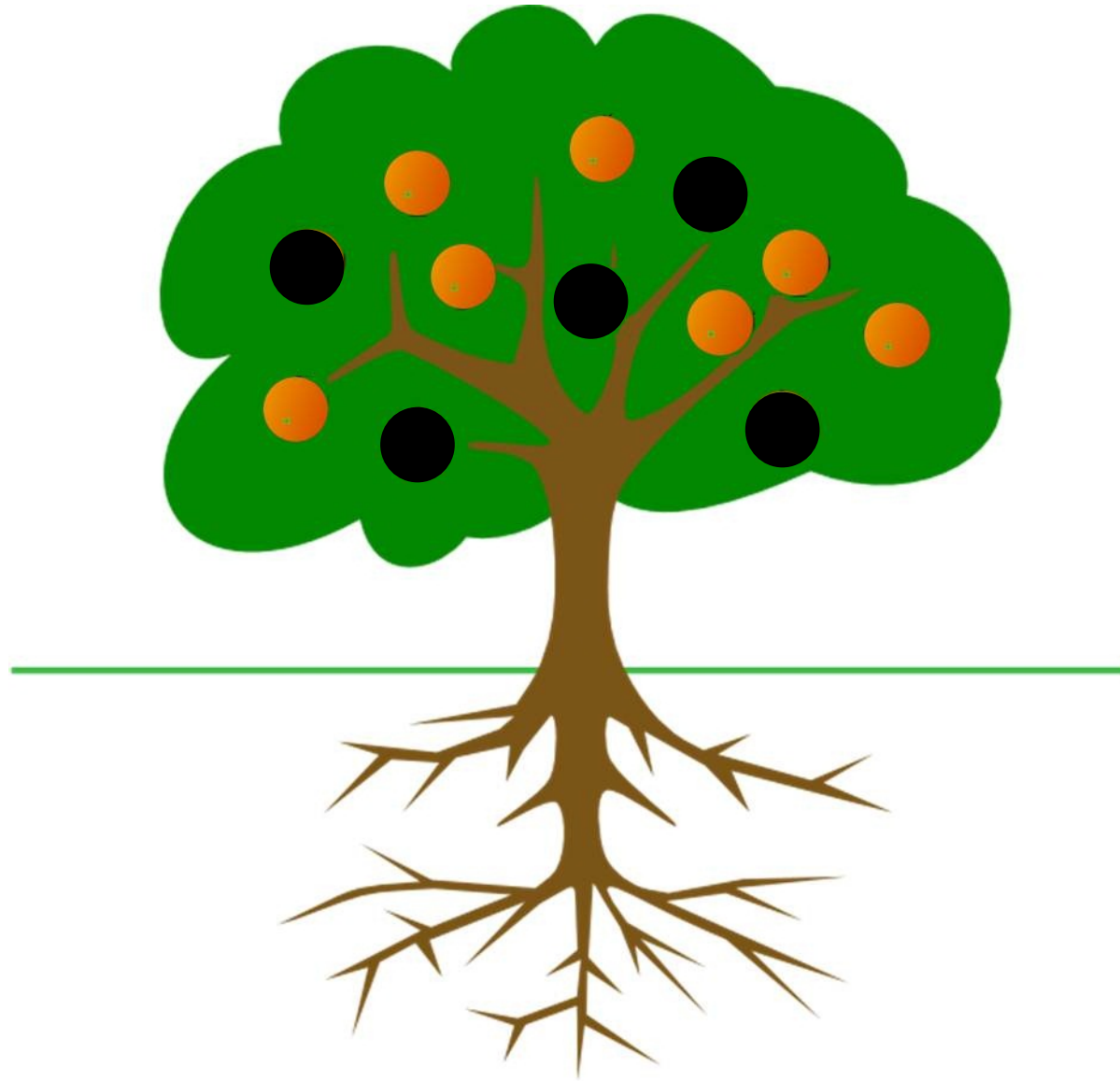


The Seduction of Tactical Management

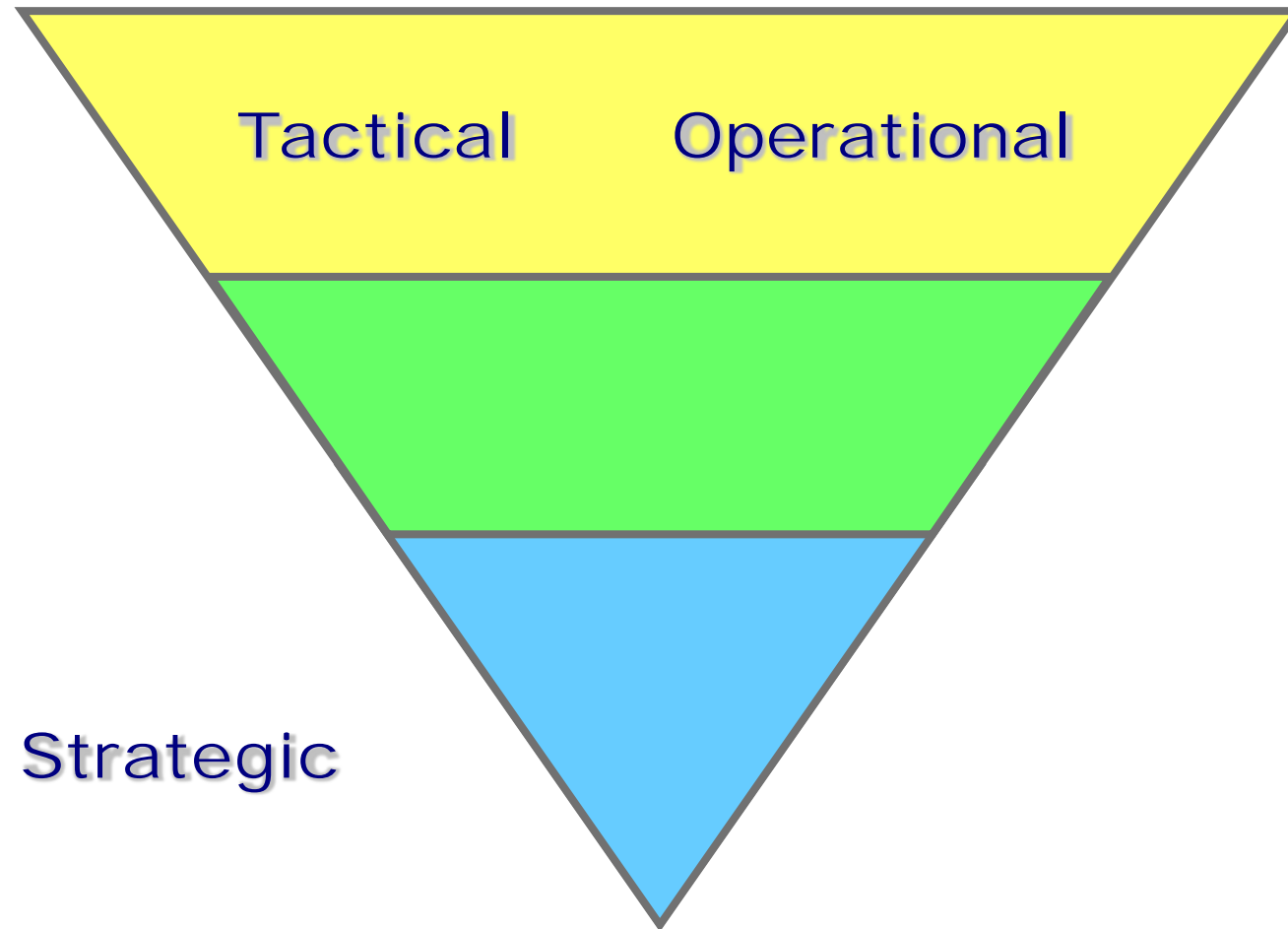
“The problem with shifting our responsibilities from tactical to strategic management is that we have become conditioned to jumping in and getting things done. We get a real sense of accomplishment by controlling the pieces and delivering the desired results.

The idea of removing ourselves from day-to-day problem-solving to focus on the big-picture issues of determining the right course for the future is a difficult transition.”





Management System Gets Inverted



The Chief's Role in Tactical Leadership

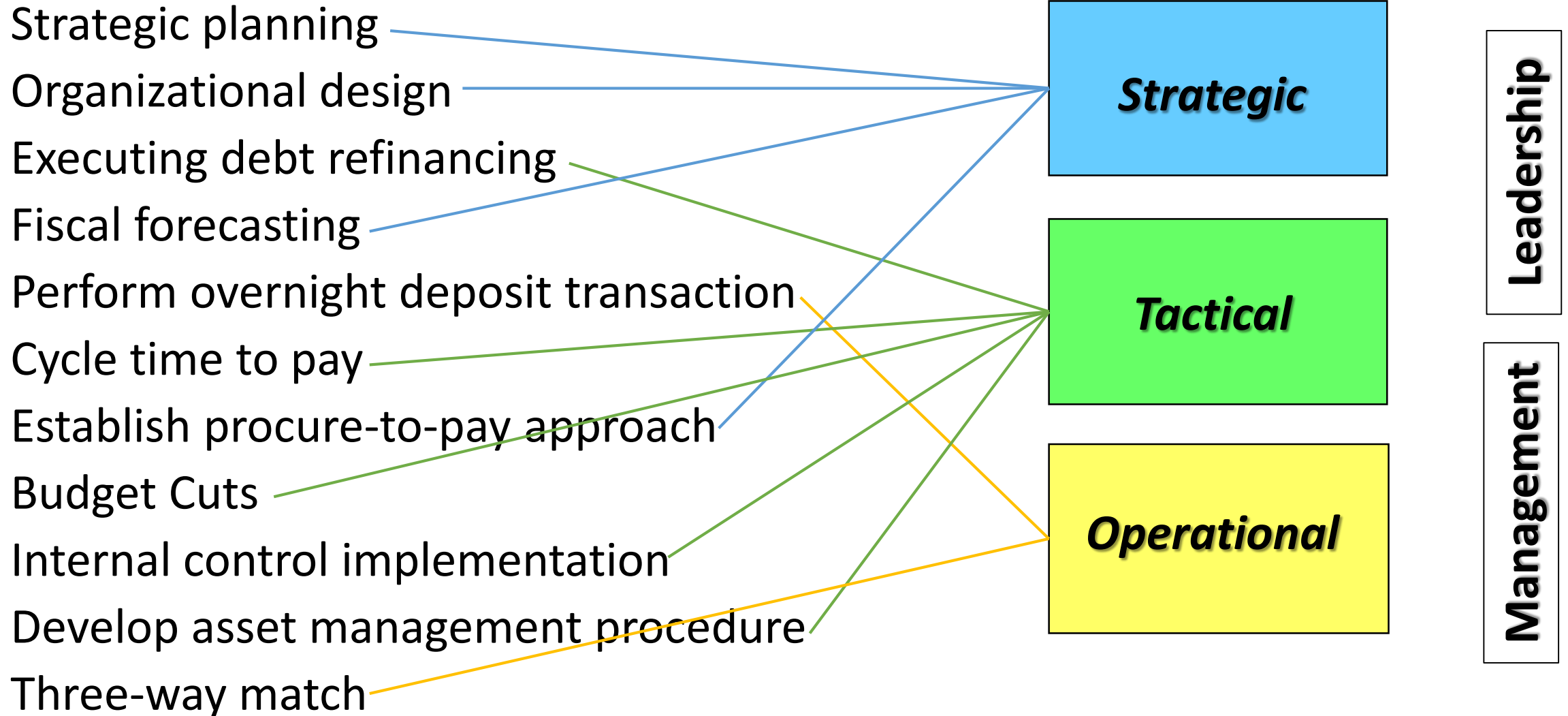
Based on the roles and responsibilities of the Chief, they must ensure an effective tactical system is in place to deliver results

Chief's should not manage inside of the tactical systems, but rather, have control methods in place to ensure it is optimized

Know your functions, but don't manage them

Focus on fire prevention, not fire fighting...

Where Do These Fall in the Systems Approach?



Transportation Costs

Tactical - Management

<u>Object</u>	Expense
Salaries	\$28.6M
Benefits	\$14.8M
Operating	\$14.0M
Total	\$57.5M

Strategic - Leadership

<u>Program</u>	Purpose	\$/Program
2-Mile Eligible	Distance to School	\$48.52M
Gifted	Special Education	\$160,449
ESE	Special Education	\$4.78M
McKinney-Vento	Homeless Students	\$7.27M
McKay	Physical Challenges	\$978,181

Transportation Costs

Unit

\$949 per student

Tactical - Management

Benchmark



Is the Industry Standard Strategic Enough?

- Line-item budgeting is still the most widely used approach in many organizations, including schools, because of its **simplicity and its control orientation**.
- It is referred to as the "historical" approach because **administrators and chief executives often base their expenditure requests on historical expenditure and revenue data**.

Is the Industry Standard Strategic Enough?

- This method budgets **by organizational unit and object and is consistent with the lines of authority and responsibility in organizational units.**
- This approach enhances organizational control and **allows the accumulation of expenditure data at each functional level.**
- Finally, line-item budgeting allows the **accumulation of expenditure data by organizational unit for use in trend or historical analysis.**

When Do We Discuss Efficiency?



Financial Efficiency

Production Efficiency



Resource Efficiency



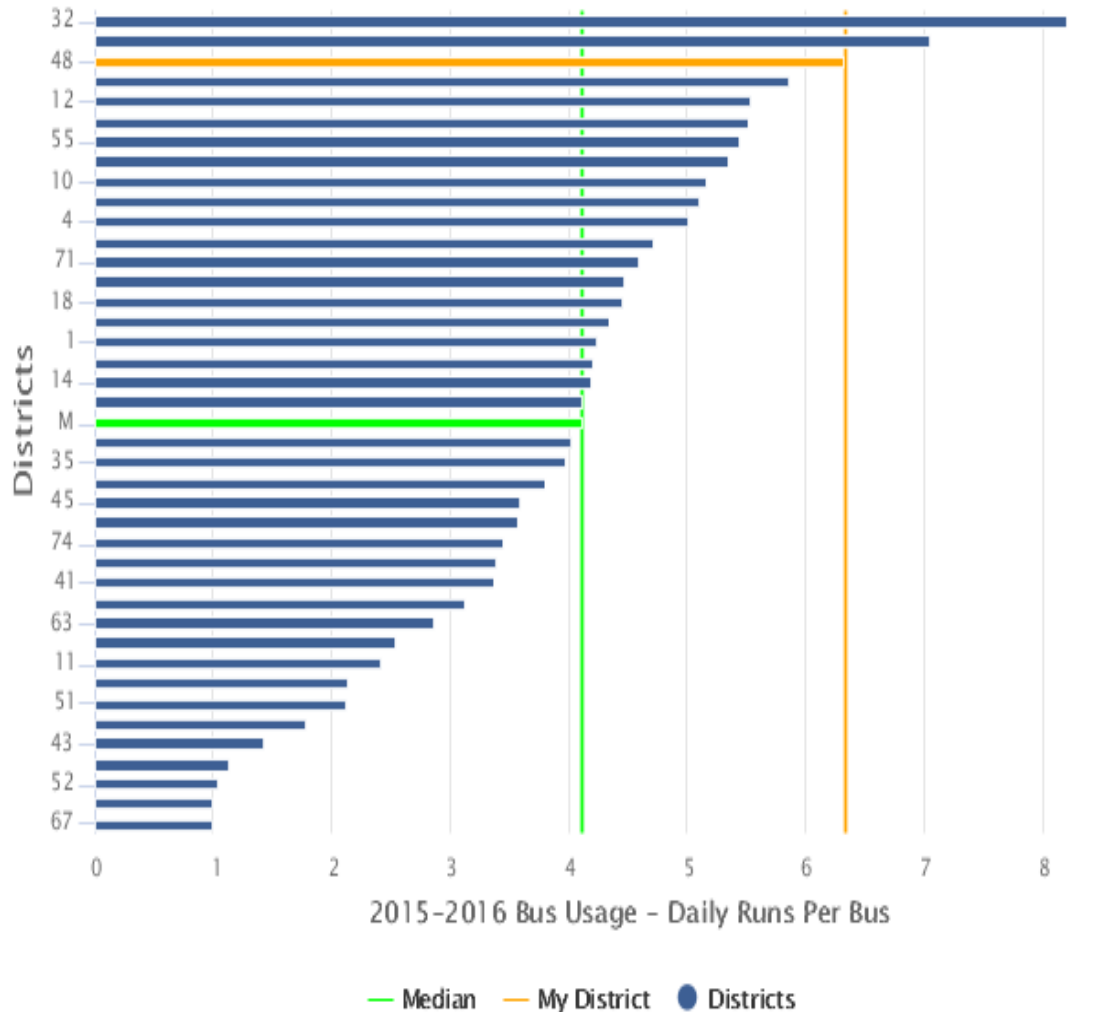
Process Efficiency



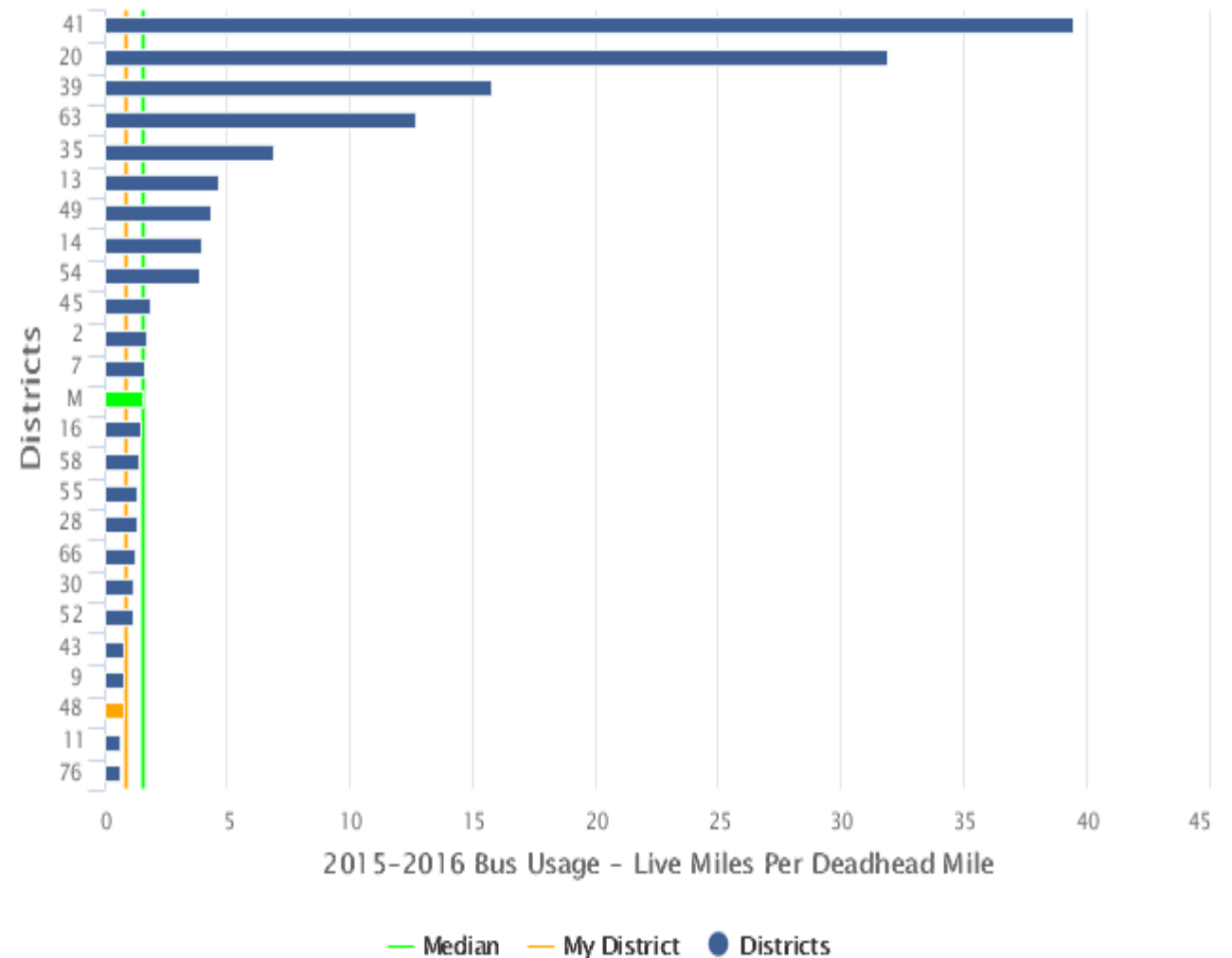
Timeliness Efficiency

Production Efficiency - Transportation

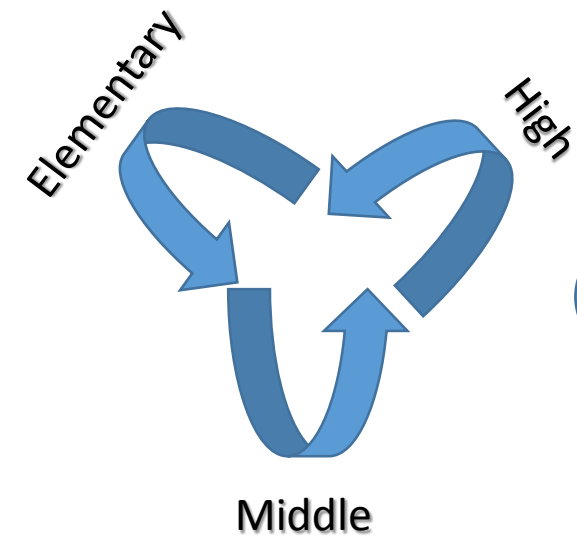
Daily Runs Per Bus



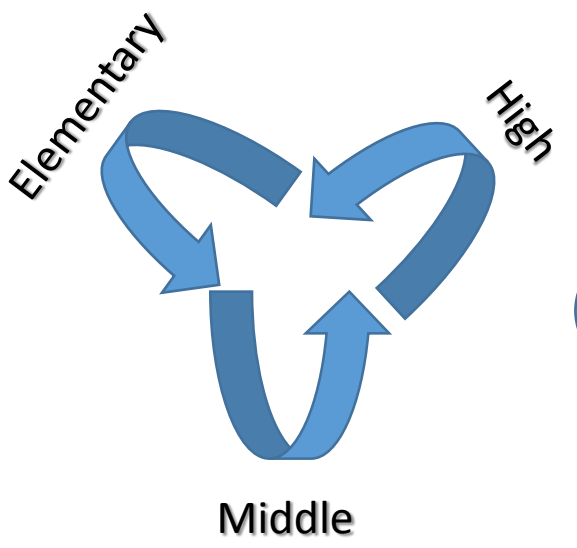
Lives Miles Per Deadhead Mile



Production Efficiency - Transportation

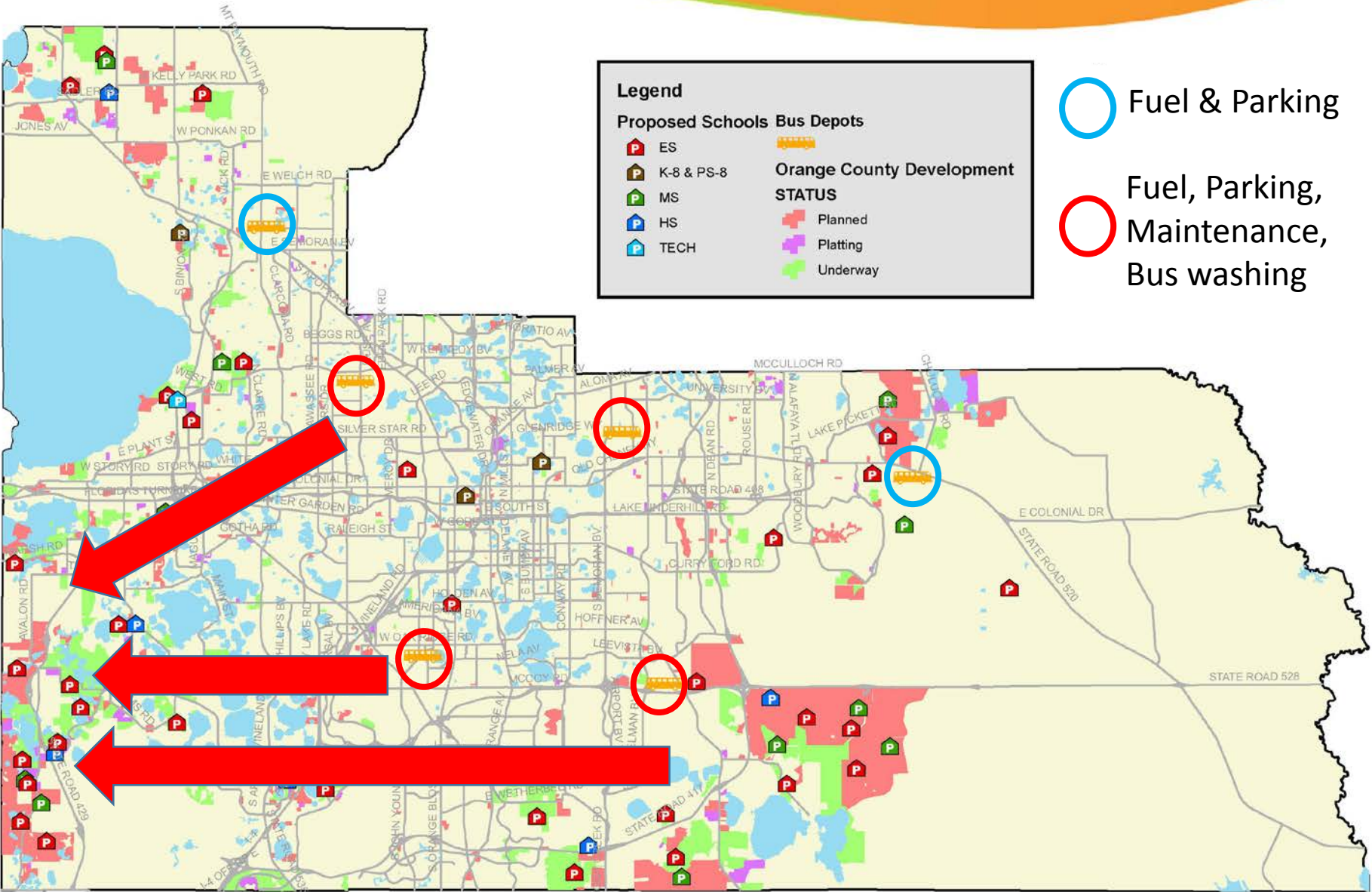


Morning

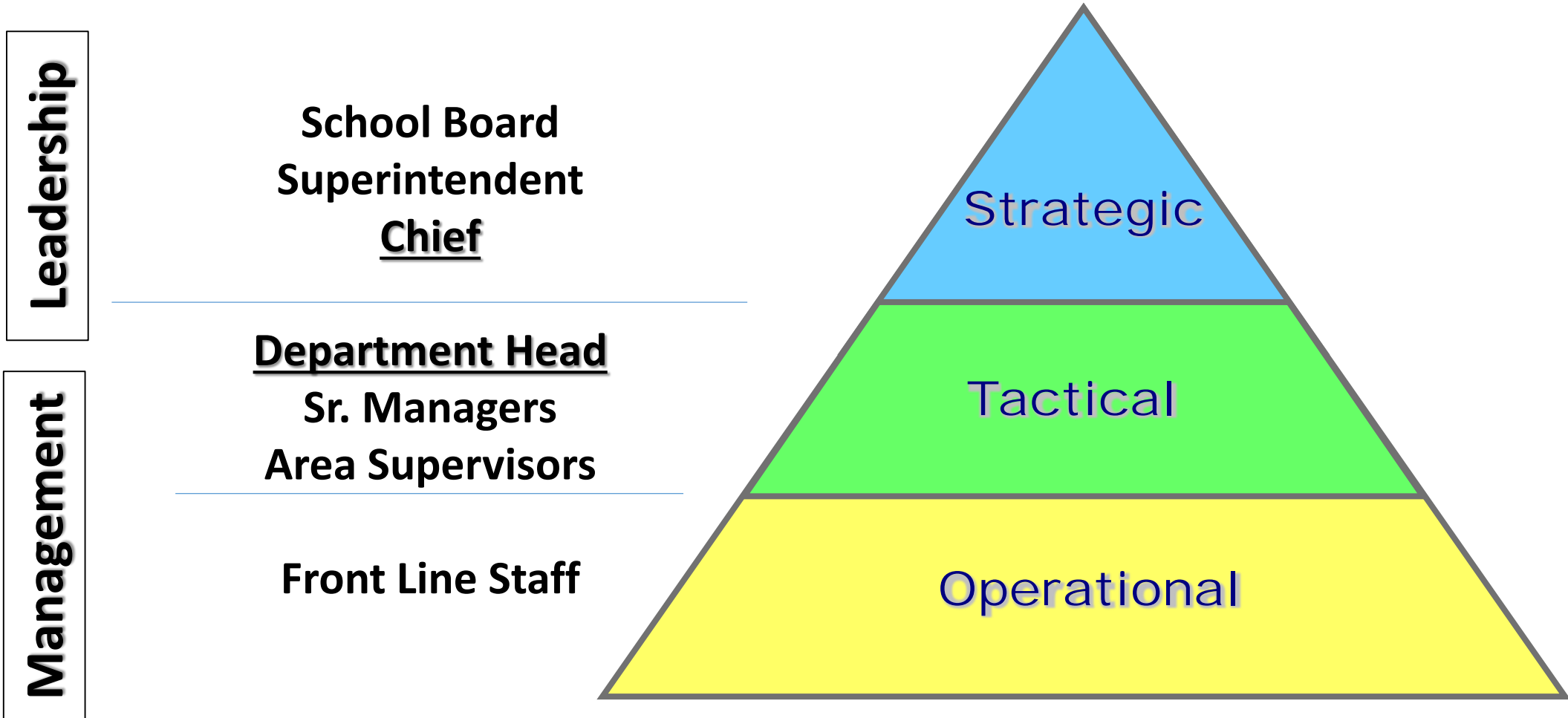


Afternoon

Residential Development and Planned Schools



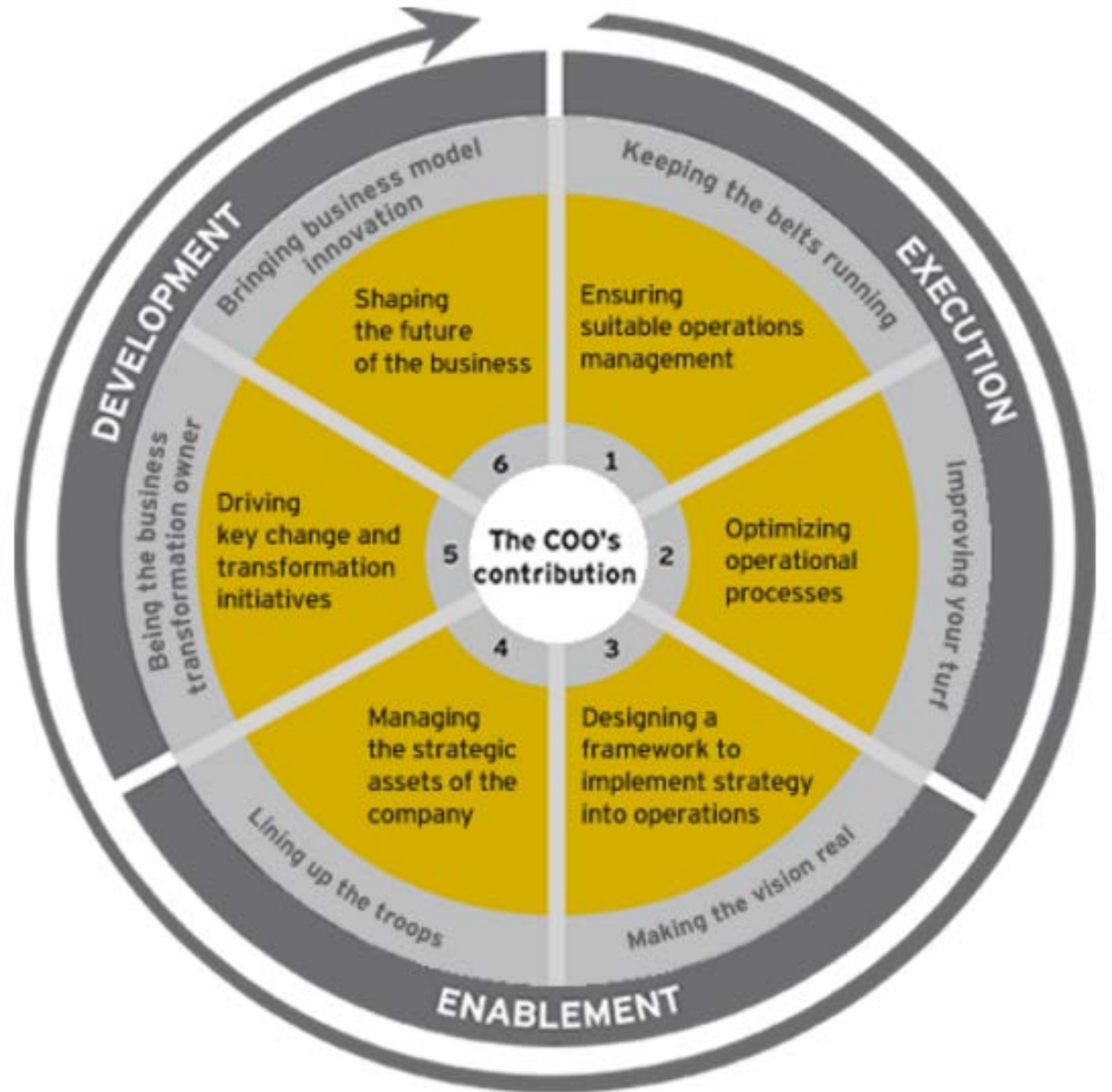
Systems Management



Chief Ensures the System is Effective



Successful COOs need to master the basics of ensuring that there is suitable operations management in place through to defining the future shape of the business.



Six Key Areas for ALL Chiefs

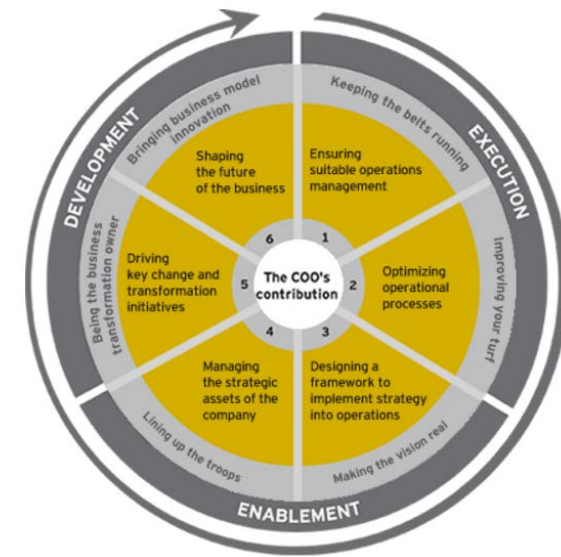
Execution Focus

1) Ensure Suitable Management Structure:

- Manage processes and procedures
- Cost allocation, budget management, efficiency realization
- Target setting and KPI management for performance
- Workforce allocation

2) Optimize Operational Processes:

- Increase agility to adapt
- Enhance cross functionality across silos
- Continuous improvement
- Use analytics for decisions and changes
- Leverage innovation and build workforce incentives



Six Key Areas for ALL Chiefs

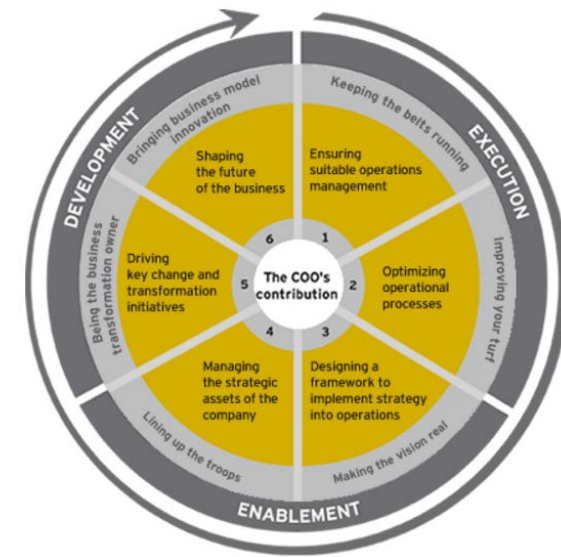
Enablement Focus

3) Design Framework to Move Strategy

- Create org structure so supply meets demand
- Establish goals for operational units to achieve strategic objectives
- Monitor systems and KPI data to ensure alignment
- Lead with integrity, visibility and trust

4) Manage Strategic Assets

- Manage and monitor activities for continuity
- Create a pipeline of talent through recruitment and retention
- Develop the workforce and align talent to strategic management priorities
- Ensure quality delivery of products and services



Six Key Areas for ALL Chiefs

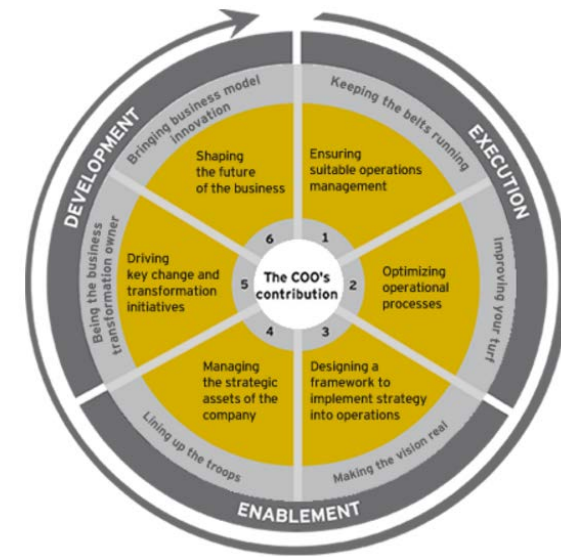
Development Focus

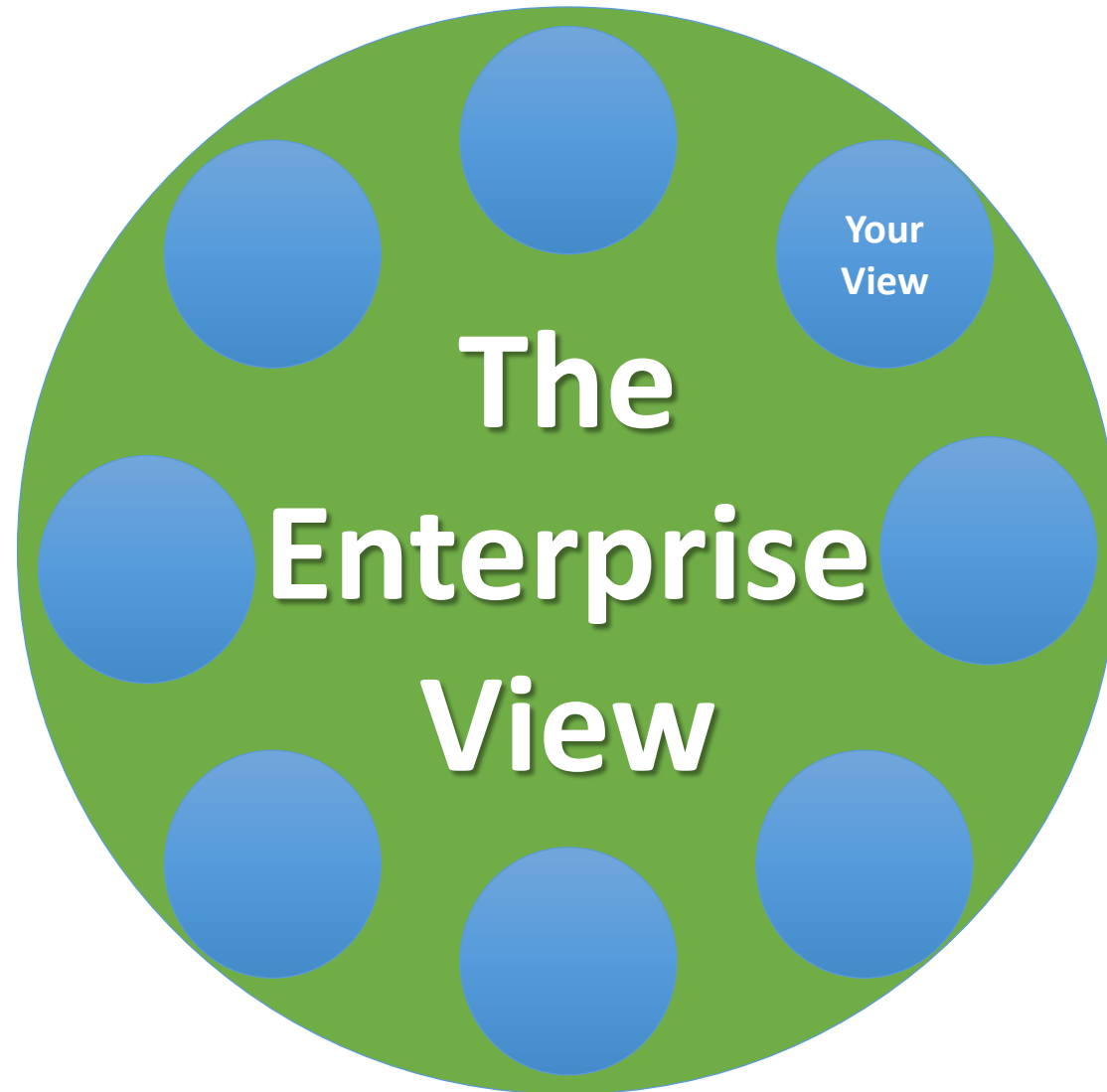
5) Drive Change & Transformation Initiatives

- Build collaboration/commitment with stakeholders
- Design clear plan, objectives and measurements to shape the path
- Manage skills and transformed activities towards change areas
- Motivate, engage, coach

6) Shape the Future of the Business

- Analyze strategic options
- Forecast market changes to operational readiness
- Articulate vision
- Create framework for innovation to address and adapt to change

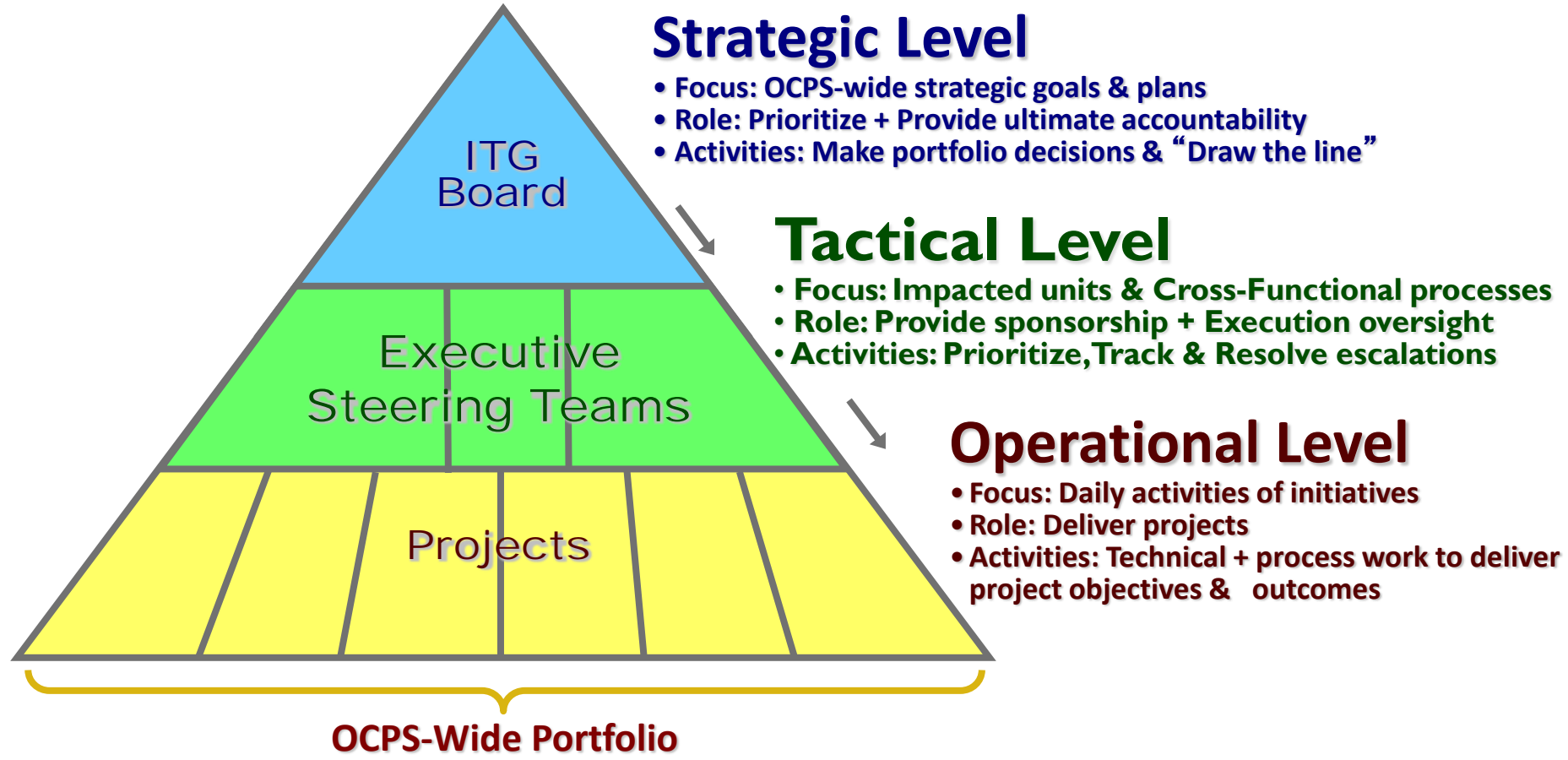




IT Governance: The Governance Pyramid

Leadership

Management



Definitions of Governance

Leadership Governance: There are three primary components of leadership governance including connecting owners, developing policy, and setting a framework for organizational performance against planned outcomes.

Management Governance: Governance is the method through which executives direct and control, manage performance, share information, and ensure strategies, direction and performance is carried out as intended to meet expected results.

Benefits of Governance

1. Creates mutual ownership
2. Promotes problem solving and conflict resolution
3. Unifies knowledge and understanding
4. Improves communication
5. Motivates continuous improvement
6. Builds collective strategy
7. Develops culture
8. Weaves a broad position of strength
9. Assists to identify and mitigate risk
10. Shifts to proactive and prevention planning
11. Enhances progress monitoring
12. Links the organization vertically and horizontally
13. Optimizes the systems approach to leadership
14. Ensures the enterprise view

Governance: Digital Curriculum

- Instruction
 - Digital content
 - Device requirements
 - Professional development
 - School inventory management
 - Digital divide
- Information Technology
 - Device acquisition & supply
 - Device support
 - Broadband expansion
 - Wi-fi density
- Human Resources
 - Position descriptions
 - Entrance requirements
 - Position changes
- Facilities
 - Classroom design
 - Classroom FF&E retrofit
 - School data wiring
- Finance & Risk Management
 - Reallocation of budgets to fund program
 - Centralization of device budgets
 - Procurement & acquisition
 - Fee policy for lost/broken devices
 - Insurance
 - Asset management
- Operations
 - School building security alarms/locks
 - Theft management/recovery
- Communications & Marketing
 - Legislative initiatives
 - Parent communication
 - Community reports
 - Media and conference opportunities







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