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

COO

will work
for food

What Does Your T-Shirt Say?

Span of Control for Chief Officers is Diverse

- Curriculum
- Enrollment
- Support Programs
- Special Education
- Alternative Education
- Adult/Tech Ed
- Guidance
- 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

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What is the Role of a Chief Officer?

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**

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
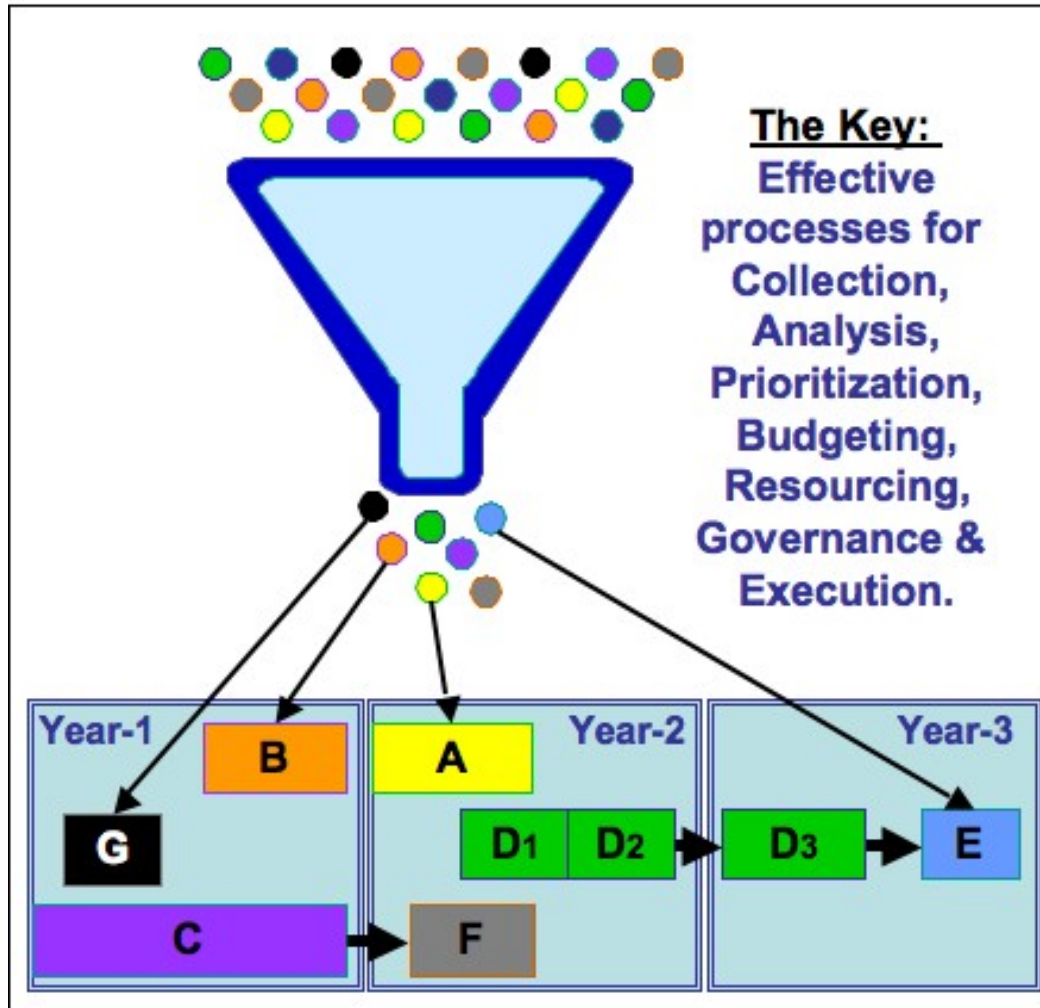
CGCS Peer Review Findings

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
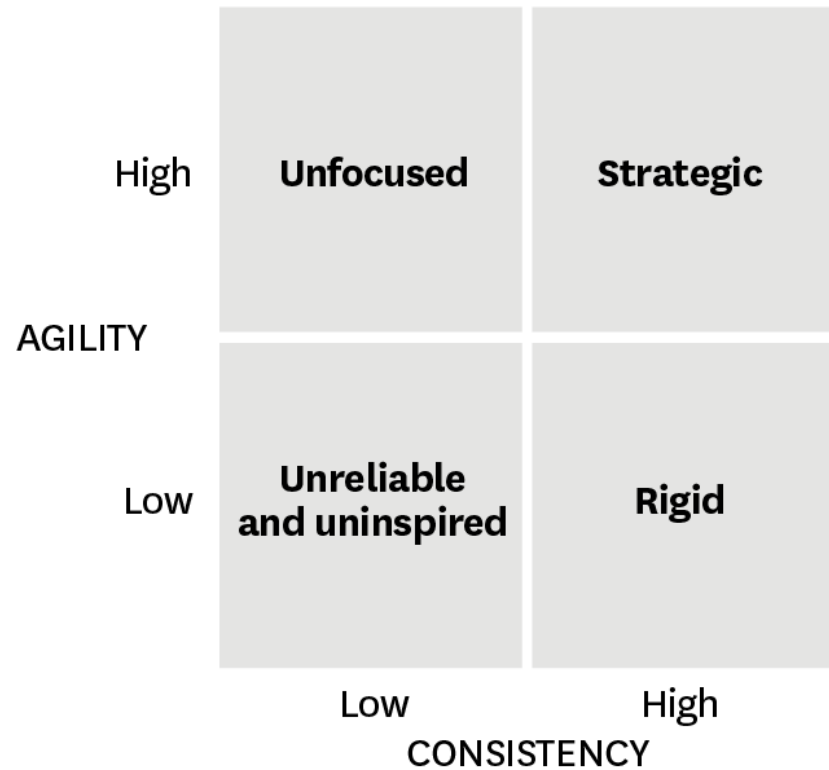- Long standing practices are not challenged… We've always done it that way…

What's the Difference?

Leadership
Vs.
Management

The Key: Effective processes for Collection, Analysis, Prioritization, Budgeting, Resourcing, Governance & Execution.

Year-1 Year-2 Year-3

B A

G D1 D2 D3 E

C F

OCPS, IT Governance Methodology

Strategic Leaders Must Be Agile and Consistent at the Same Time

	Low	High
High	Unfocused	Strategic
Low	Unreliable and uninspired	Rigid

AGILITY (vertical axis)

CONSISTENCY (horizontal axis)

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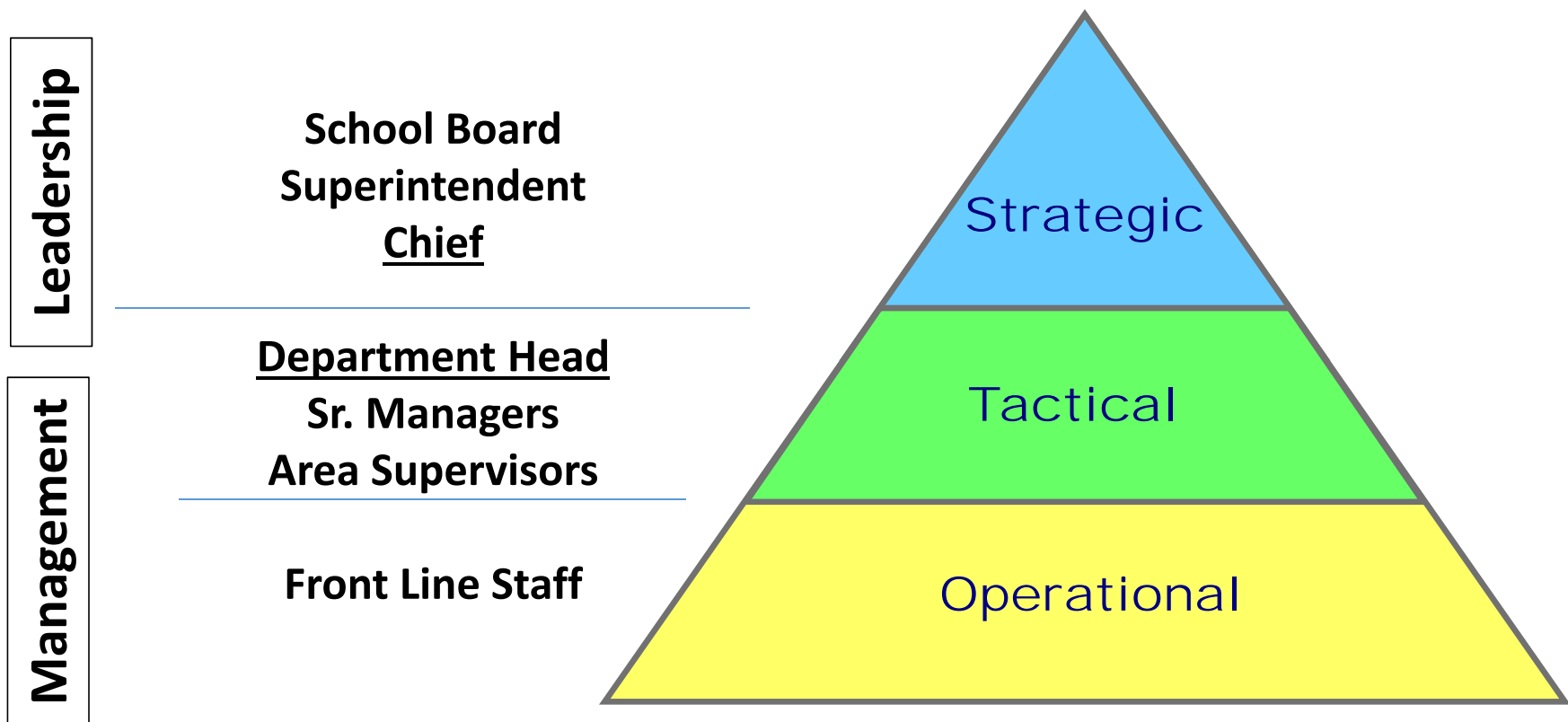
To assure **agility**, develop a planning model that allows the organization to change outside of the formal annual planning process and create an annual strategic planning process that looks outward to the external environment and forces the organization to contemplate big ideas.

"The Best Strategic Leaders Balance Agility and Consistency" - HBR

Systems Management

Leadership

School Board
Superintendent
<u>Chief</u>

Management

<u>Department Head</u>
Sr. Managers
Area Supervisors

Front Line Staff

Systems Management

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

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

The Key to Success

Strategic

Tactical

Operational

Strategic Leadership:
- Vision
- Policy & Resources
- Strategy

Tactical Management:
- Project Management
- Organizational Dev.
- Business Process
- Analytics/Monitoring

Operational Work:
- Tasks
- Issue mgt.
- Tracking
- Reporting

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
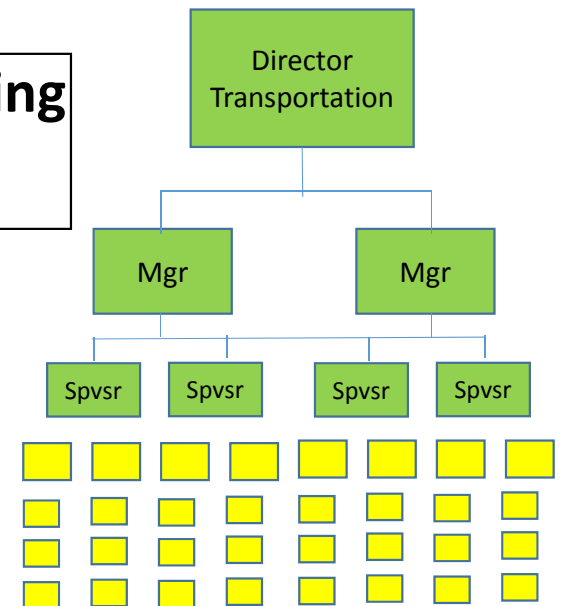
The Seduction of Tactical Management

"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."

John Gray, Purdue University
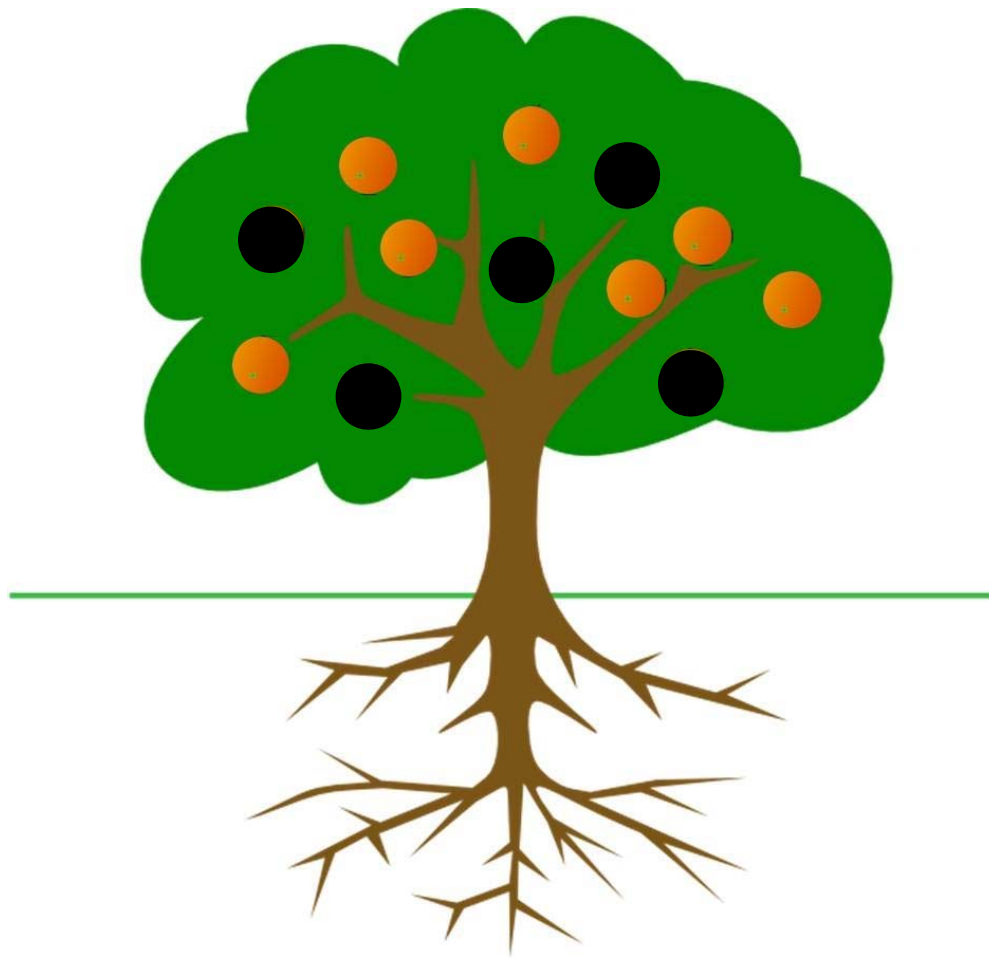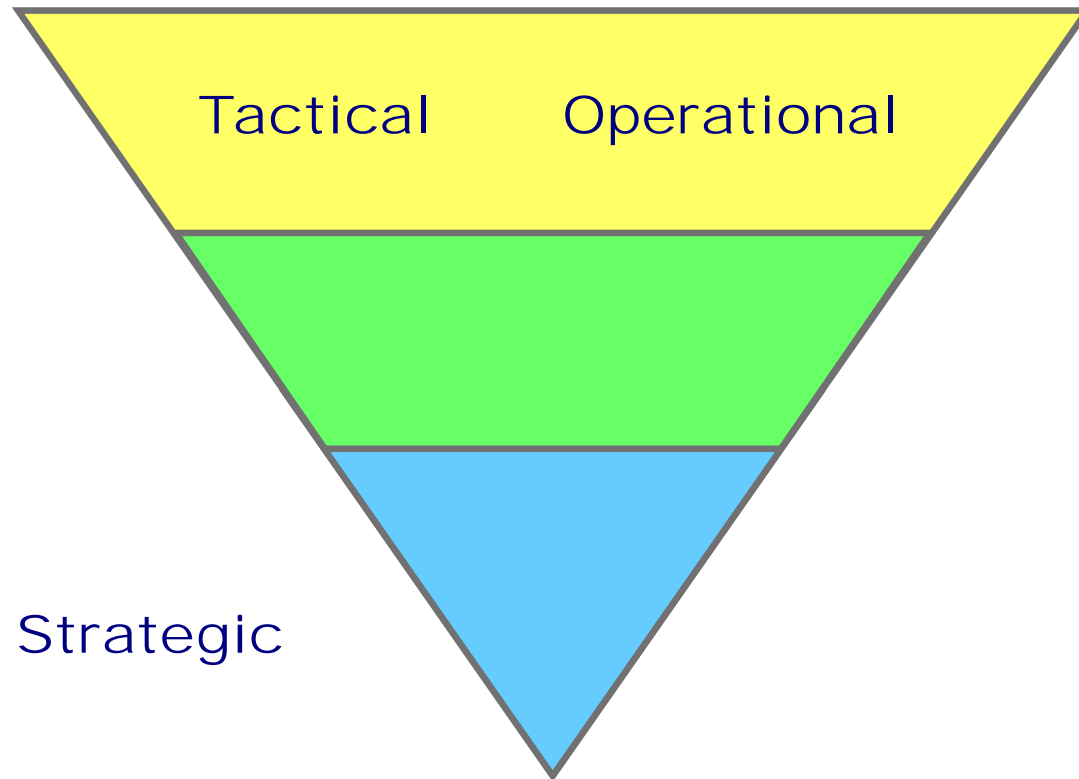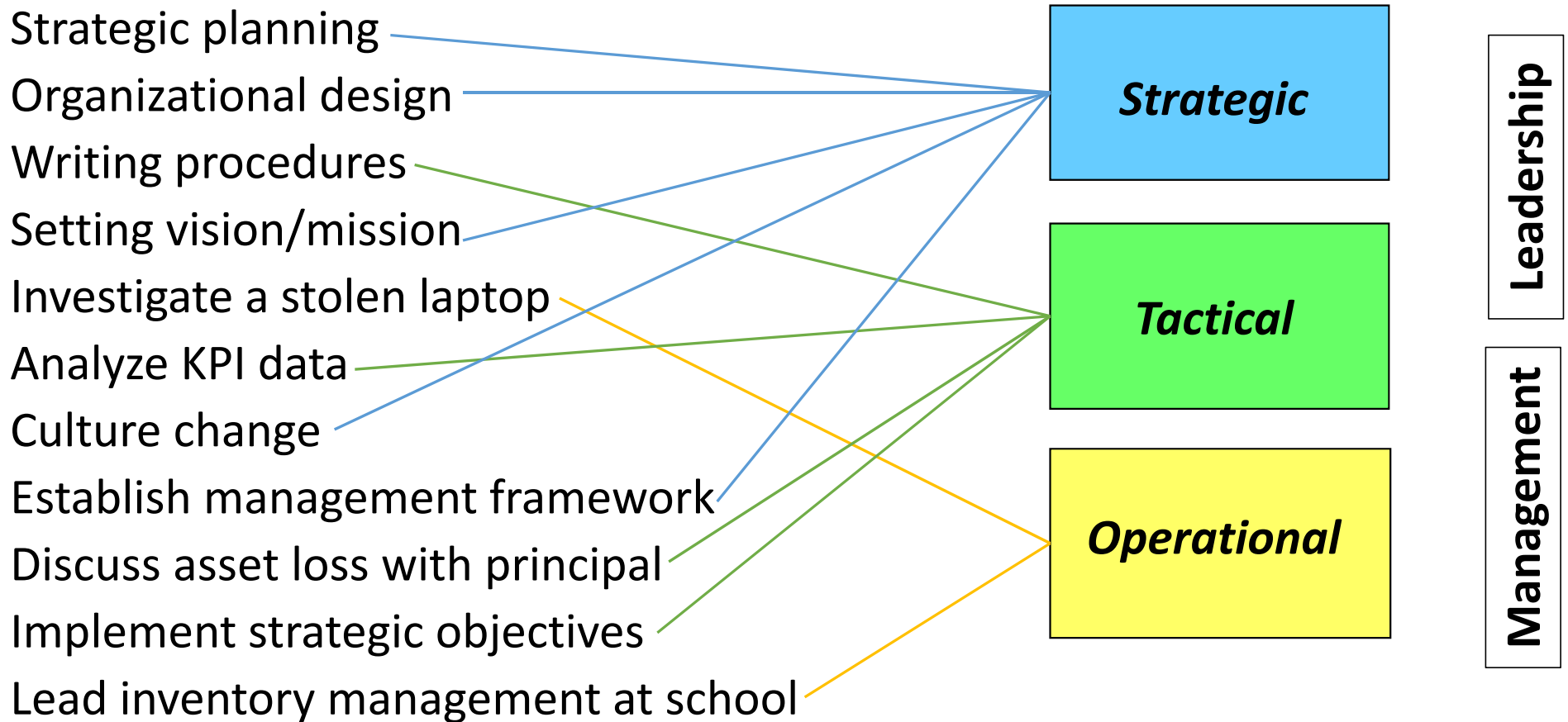
The Chief's Role in Tactical Leadership

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?

Strategic planning

Organizational design

Writing procedures

Setting vision/mission

Investigate a stolen laptop

Analyze KPI data

Culture change

Establish management framework

Discuss asset loss with principal

Implement strategic objectives

Lead inventory management at school

Strategic

Tactical

Operational

Leadership

Management

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.
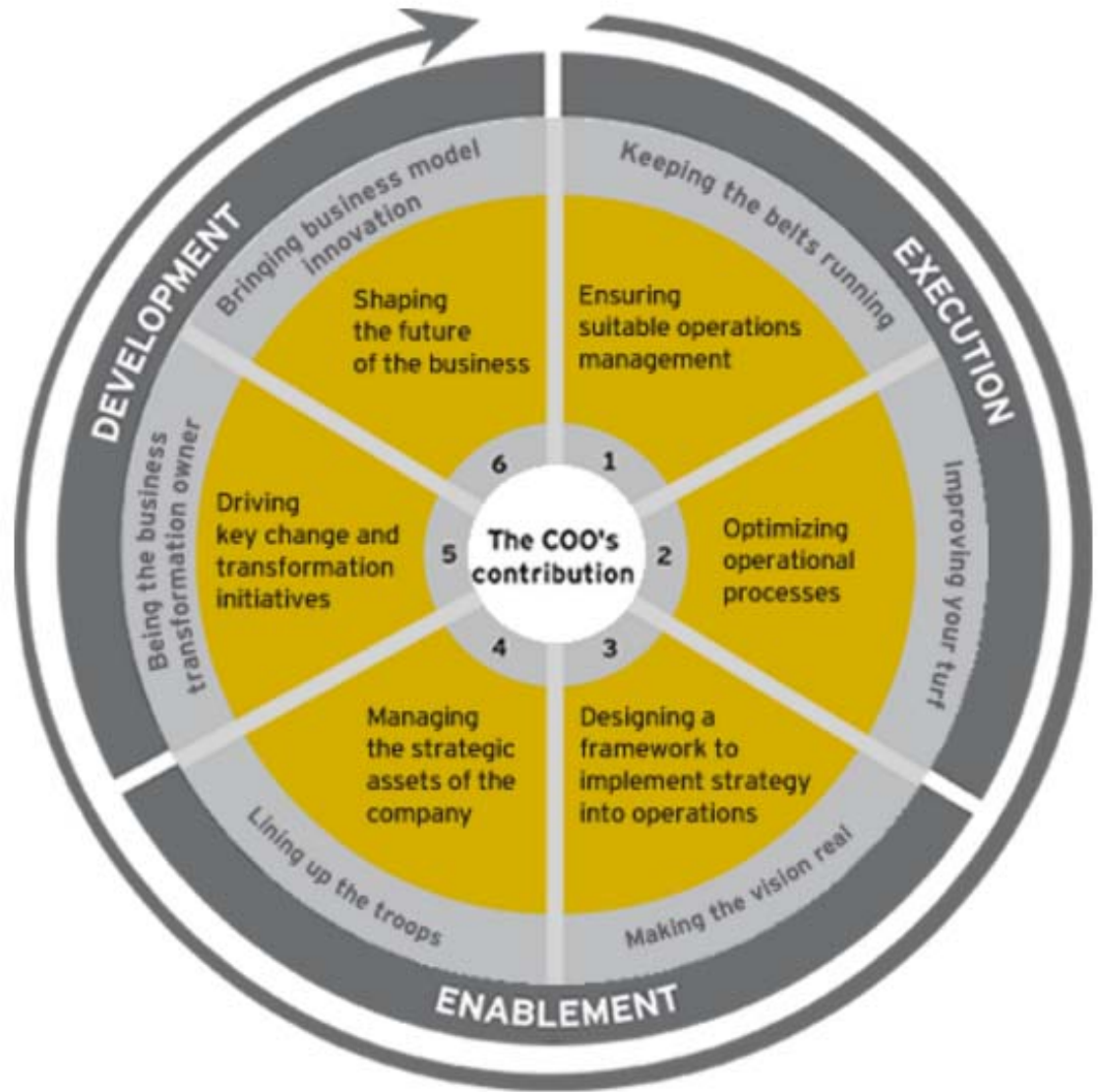
"Resetting the logic of the COO's role", Ernst & Young
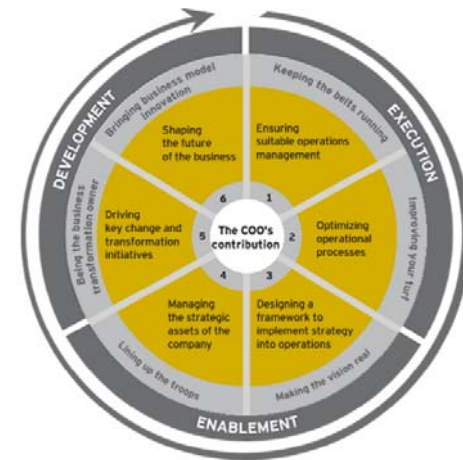
Six Key Areas for <u>ALL</u> Chiefs

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

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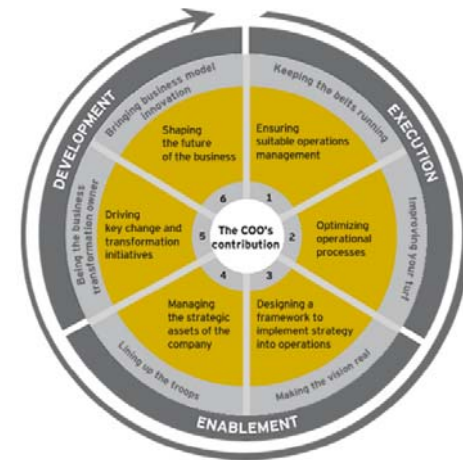
Six Key Areas for <u>ALL</u> Chiefs

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

"Resetting the logic of the COO's role", Ernst & Young

Six Key Areas for <u>ALL</u> 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
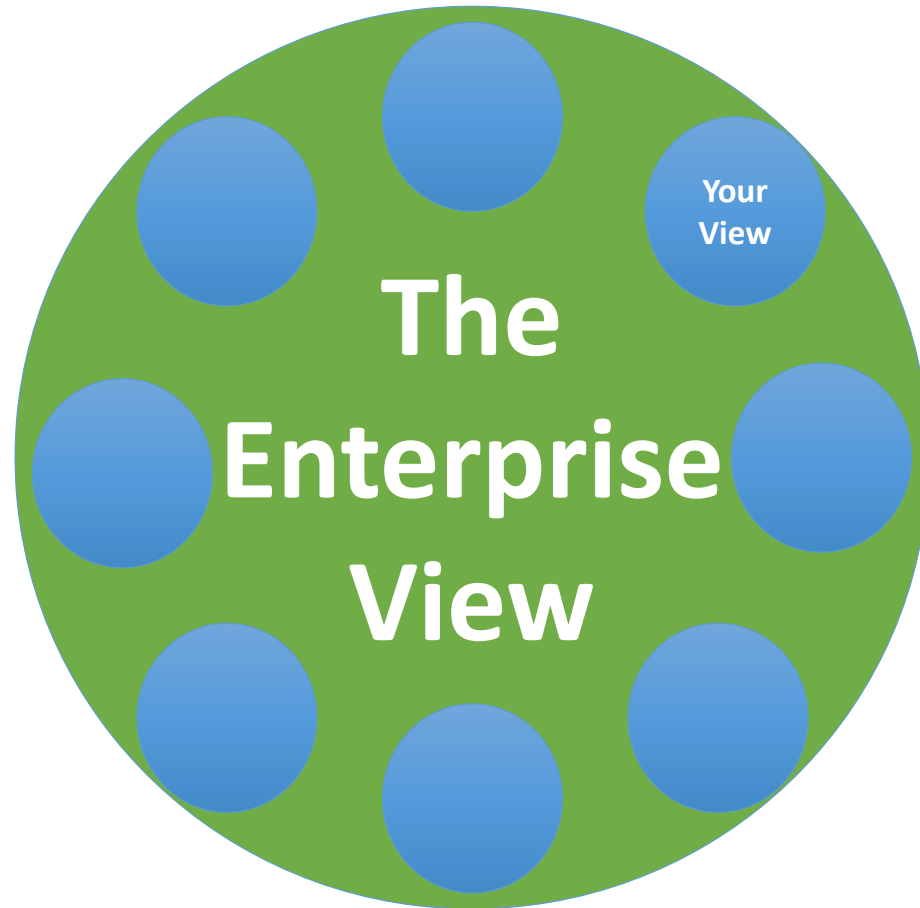- Create framework for innovation to address and adapt to change
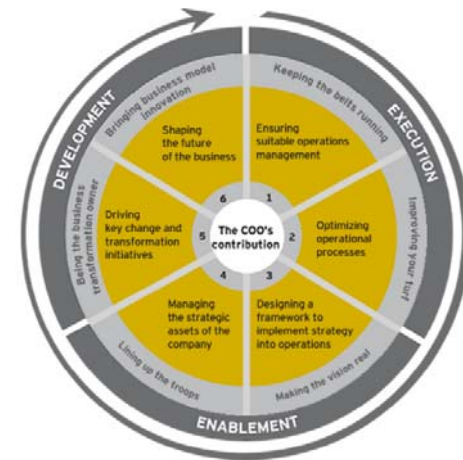
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Span of Control for Chief Officers is Diverse

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- Special Education

- Media Relations
- Construction
- Planning
- Maintenance

- Help Desk
- **Digital Curriculum**
- Food Services
- Transportation/Fleet

Digital Curriculum

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IT Governance: The Governance Pyramid

Leadership

Management

ITG Board

Executive Steering Teams

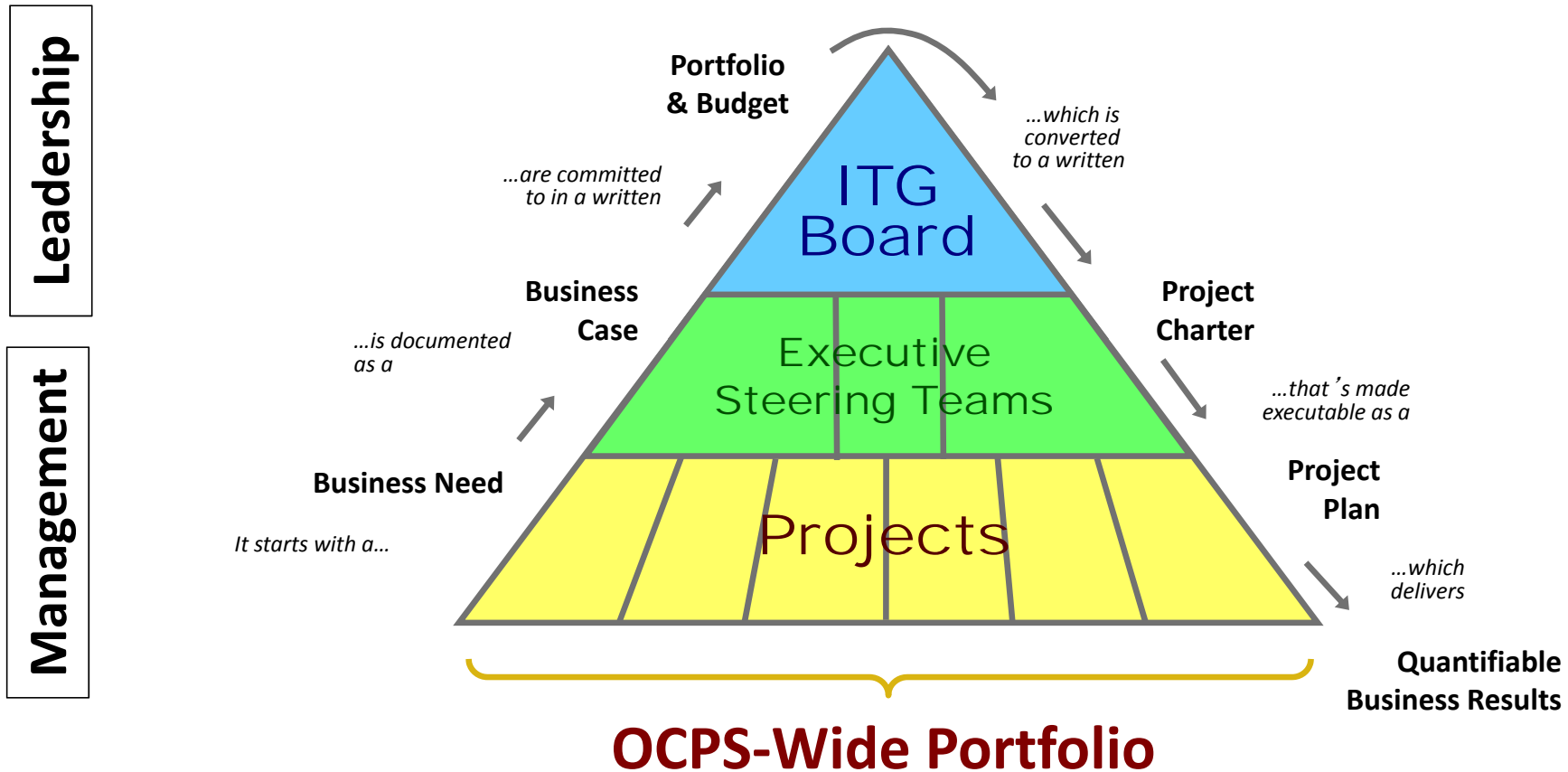**Projects**

OCPS-Wide Portfolio

Strategic Level
- Focus: OCPS-wide strategic goals & plans
- Role: Prioritize + Provide ultimate accountability
- Activities: Make portfolio decisions & "Draw the line"

Tactical Level
- Focus: Impacted units & Cross-Functional processes
- Role: Provide sponsorship + Execution oversight
- Activities: Prioritize, Track & Resolve escalations

Operational Level
- Focus: Daily activities of initiatives
- Role: Deliver projects
- Activities: Technical + process work to deliver project objectives & outcomes

IT Governance: The Governance Pyramid

Leadership

Management

Portfolio & Budget

...which is converted to a written

...are committed to in a written

ITG Board

Business Case

...is documented as a

Project Charter

Executive Steering Teams

...that's made executable as a

Business Need

It starts with a...

Projects

Project Plan

...which delivers

Quantifiable Business Results

OCPS-Wide Portfolio

IT Governance: The Portfolio Budget

Leadership

One
Portfolio Budget
for all
OCPS IT Initiatives

OCPS
Portfolio
Budget

Management

One
Consolidated Spend Analysis
Per
Executive Steering Team

C & I
CSA.xls

I & E
CSA.xls

Business
CSA.xls

One
Spend Analysis
per
Initiative
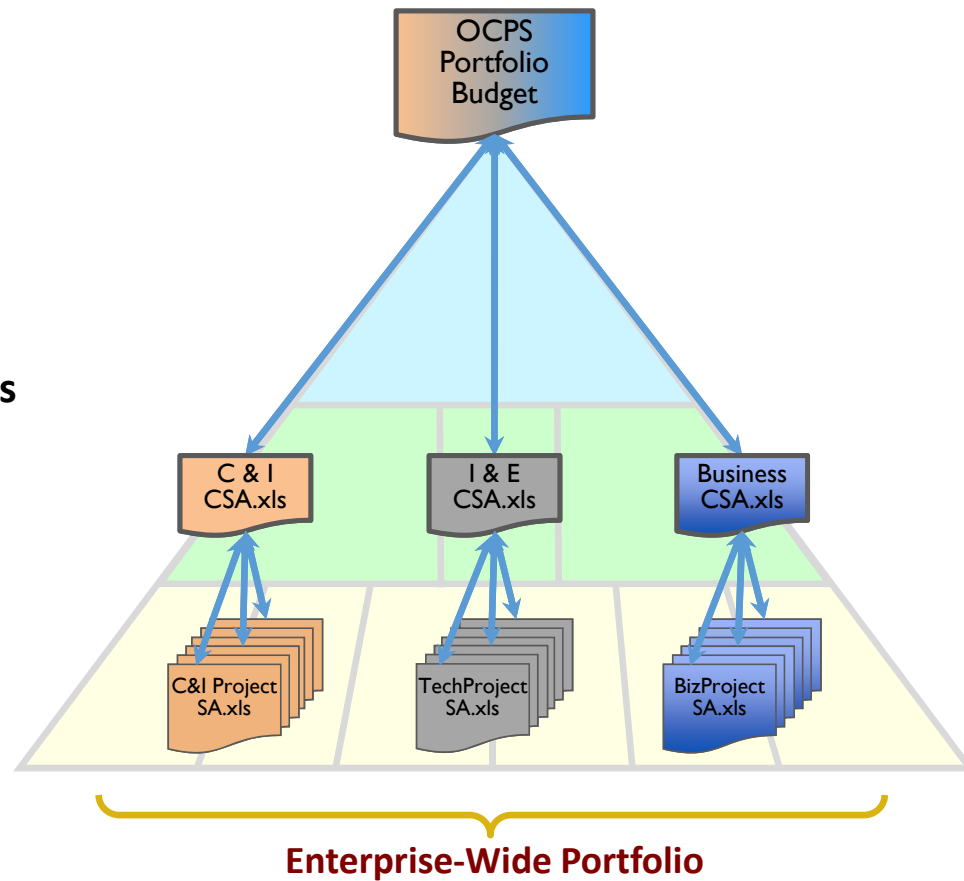
C&I Project
SA.xls

TechProject
SA.xls

BizProject
SA.xls

Enterprise-Wide Portfolio

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Definitions of Governance

- "The art of steering societies and organizations"

- "The processes of interaction and decision-making among the actors involved in a collective problem that lead to the creation, reinforcement, or reproduction of social norms and institutions."

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.

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.
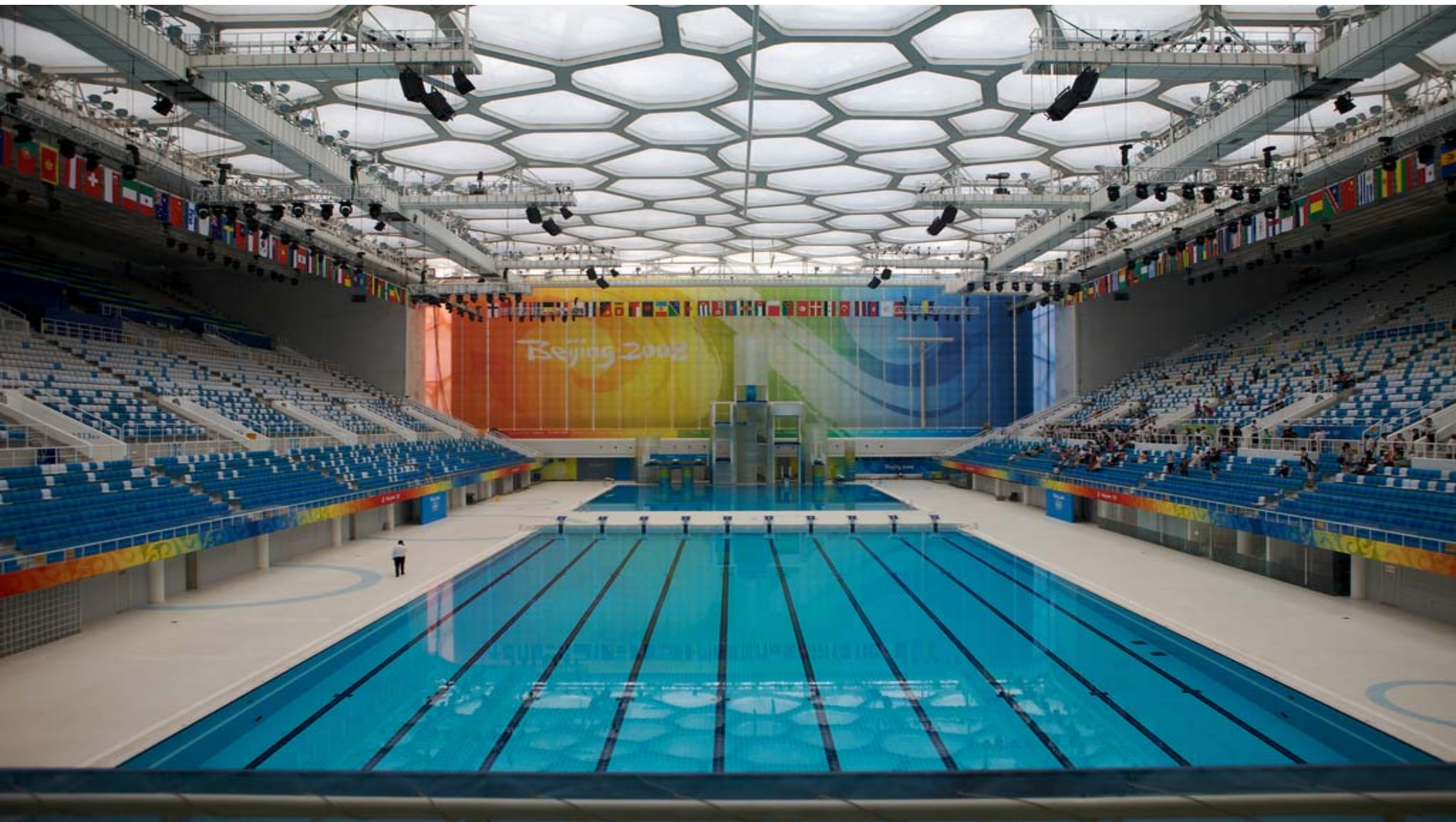
Benefits of Governance

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
  - Human resources
  - School inventory management
  - Digital divide
- Information Technology
  - Device acquisition & supply
  - Device support
  - Broadband expansion
  - Wi-fi desity
- Facilities
  - Classroom design
  - Classroom FF&E retrofit
  - School data wiring

- Finance & Risk Management
  - Reallocation of budgets
  - Centralization of device budgets
  - Procurement & acquisition
  - Fee policy for lost/broken devices
  - Insurance
- Asset Management & Security
  - Asset management controls
  - School security
  - Theft management
- Communications & Marketing
  - Legislative initiatives
  - Parent communication
  - Community reports

OCPS LaunchED

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