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*SOURCING THE HUMAN MISSION.*



# Strategic Resource Management: Are You Doing GREAT Work?

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June 16, 2010



# WELCOME!

# Overview of the Strategic Planning Modules

- **Module 8: Strategic Resource Management**
- **Module 9: Strategic Planning**
- 
- **Module 10: Strategic Change**



# Something to think about

The reason that everybody likes planning is that nobody has to do anything.

~Jerry Brown



# Goals of Today's Session

- Understand the concepts about strategic resource management
- Discuss the context and framework for strategic resource management in meeting Head Start program objectives
- Identify the roles and responsibilities needed to understand and manage resources for administering your program



# Setting the Tone

## Understanding the Big Picture



# The Big Picture

1. Improving Head Start for School Readiness Act (2007)
2. Head Start Roadmap to Excellence (2010)
3. Head Start & Early Head Start Research (past 45 years)
4. State-driven early care standards



# Raising the Bar!

What will it take?



# What is Strategic Resource Management?



A process for implementing a strategy for carrying out core management functions for allocating and managing resources for delivering a service.

Source: Google Web Definition

# What is a Strategy?

A pattern of moves and approaches devised by a group to produce successful organization performance. It is a commitment of resources to achieve specific goals for sustainable competitive advantage in the market.



Source: Google Web Definition

# It is a commitment to

- Time
- Money
- Focus



# Principles of Effective Strategic Resource Management

1. A great strategy is worthless unless you can execute it. To do so, you will need the RIGHT resources, infrastructure and role flexibility
2. Strategic management must not end with the last annual planning meeting, but it must be executed and monitoring periodically.
3. Begins with a vision of where the organization needs to go - direction



# Principles of Effective Strategic Resource Management

4. Make sure that the process you choose to guide your planning efforts is sound and will be the best way to achieve your desired results.
5. Committing the resources, making the time and uncovering and addressing obstacles is the hardest part – but you control the process.



# What Does Strategic Resource Management Look Like in Head Start?

1. Position/Job Descriptions aligned with the goals of the agency.
2. T/TA Plan with clear goals, objectives and outcomes are aligned with meeting Head Start program objectives.
3. Budget narrative is aligned with the goals of the agency and not just activities.
4. Thorough self-assessment process for evaluating the strategic plan.



# Process for Establishing a Framework for SRM in Head Start and Early Head Start

- Develop a review process for your service area plans to determine appropriate allocation of resources.
- Evaluate your current record-keeping system.
- Identify trends in program spending across service areas and administrative services.
- Maintain updates to your community assessment
- Include resource allocation as part of the annual self-assessment process.
- Create a mechanism for evaluating your strategic plan.



# Examples of Meeting Head Start Program Objectives

- Funded Enrollment
- Services to 10% of children with special needs
- Child Outcomes
- Family Self-Sufficiency
- Transition





# PARADIGM SHIFT

# Logic Model Thinking

- Based on logical thinking
  - If you take these . . .
  - And do these . . .
  - Until you reach these . . .
  - You will create these benefits . . .
- Provides a framework for programs to plan and analyze the effectiveness of their work



# Where Are You Today?

## GROUP DISCUSSION



# What is Required?

1. Knowing your community.
2. Understanding your program design.
3. Good connections with staff.
4. Concern about the issues and how you want to address them.
5. Keeping the process simple



# What do you see as the Challenges?



# What do you see as the Advantages?





# Q & A

# Something to think About



Are you Doing Great Work!



# Transition to the Module 9

## Strategic Planning: Life After ARRA

# Something to think about

*Aim for Service and  
Success will follow.*

*~Albert Schweitzer*



# Goals of this Session

- Discuss the context and framework for strategic planning and expectations.
- Understand how to use strategic planning as a tool in achieving sustainability.
- Identify strategies for advancing your strategic planning process to achieve growth and/or program improvements.



# Story to share

This is the story of four people:  
**Everybody**, **Somebody**, **Anybody**, and  
**Nobody**.

Courtesy of Johnny Cain



# The Committee

Once upon a time, there was a task to be done, and **everybody** was sure that **somebody** would do it.

**Anybody** could have done it, but **nobody** did it.

**Somebody** got angry, because it was **everybody's** job.

**Everybody** thought that somebody would do it.

But **nobody** asked **anybody**.

It ended up that the job wasn't done and **everyone** blamed **somebody** when actually **nobody** asked **anybody**.



# What is Strategic Planning?

An organization's process of defining its strategy, or direction, and making decisions on allocating resources to pursue this strategy, including capital and people.

Source: Wikipedia



# Thinking Strategically

## Key Strategic Factors

Be Innovative	New Formats
Free Yourself	New Systems
Be Entrepreneurial	New Products/Services
Be Creative	New Personnel
Be Imaginative	New Linkages



# Understanding Strategy

- Revisiting Your Mission & Vision
- Establishing Goals, Objectives and Stated Outcomes
- Implementation Strategies
- Evaluating Progress



# Building a Strategy

There are 3 stages in the strategic process

1. Analysis – provides the basics for making choices.
2. Planning - provides direction.
3. Implementation brings the results.



# What Head Start Requires

## 1304.51 Management Systems and Procedures

- Systematic, ongoing process of program planning that includes consultation with the program's governing body, policy groups, program staff and other community organizations.



# What Head Start Requires

## 1304.51 Management Systems and Procedures

- An assessment of community strengths, needs and resources – 45 CFR 1305.3
- The formulation of both multi-year (long range) program goals and short-term and financial objectives that address the findings of the Community Assessment



# What Head Start Requires

## 1304.51 Management Systems and Procedures

- The development of written plans for implementing services in each of the program areas



# Establishing the Process

## Establishing Strategic Planning in Head Start and Early Head Start

- Strategy Development
- Strategy Formulation
- Strategy Implementation
- Strategy Evaluation



# Strategy Development

- Mission
- Vision
- Goals and Objectives

Tip: Selecting the appropriate model –  
Basic, Issues/Goals driven and Alignment



# Strategy Development

Something to remember – There are several types of strategic planning models:

Basic – Action plan with goals

Issues – Plan to address the issues/problems

Alignment – ensures strong alignment with the agency's overall mission



# Strategy Development

## TIPS

- Keep your statement of purpose short, to the point and action-oriented.
- See that your purpose fits in with your agency.
- Make sure that your team is able to state the purpose.
- Talk through your goals and objectives with other teams to foster service integration.



# Strategy Formulation

- External Analysis
- Competitive Analysis
- SWOT Analysis
- Data Sources Used in Formulation



# Strategy Formulation

## TIPS

- Keep the focus on what you can realistically achieve.
- Allow for an independent assessment



# Strategy Implementation

## Key Elements of the Agency

- People – Hiring people who are well-suited for the agency; coaching staff in the mission
- Organization - infrastructure
- Processes – Approaches for administering the program
- Culture – Shared understanding and beliefs



# Strategy Implementation

## TIPS for putting your Plan to Work

- Commitment
- Communicate, communicate, communicate
- Make sure everyone buys in – feedback
- Hold staff accountable
- Leadership – you have to be motivated



# Strategy Evaluation

- Ensure that the plan is results-oriented.
- Functions and duties are secondary.
- Doing a good job means getting the right things done.
- Must be done to determine if you are heading in the most strategic direction.



# Strategy Evaluation

## TIPS

- What gets measured is what gets done.
- Organize team reports that signal red flags
- Create a strategic plan poster
- Hold a monthly strategy meeting



# Strategic Thinking starts with

## How to Make it Great Work!





# Transition to Module 10

Strategic Change: Raising the Bar to  
Meet New Expectations



# Something to think about

If you don't like something  
change it; if you can't change it,  
change the way you think about  
it.

~Mary Engelbreit



# Goals of this Session

- Understand the concepts of leading successful strategic change
- Identify a change process that your organization can easily adapt to delivering a high quality program during an economic recession
- View strategic change as an opportunity for making program improvements



# DO YOU WANT THINGS TO BE BETTER IN YOUR AGENCY?



# ASK YOURSELF 3 Things

1. Where are we now?
2. Where do we want to go?
3. How will we get there?



# Then ASK YOURSELF 3 Other Things

Are staff committed and understand the mission?

Are individuals in my agency working together towards an agreed-to set of goals? Are we seeing the results?

Is my agency performing up to its full POTENTIAL?



IF YOU REALLY WANT THINGS TO  
BE BETTER, YOU WILL HAVE TO

Change Something!



# But . . . What to Change?

Write Down Three Things You Want to See Improve in Your Agency



# How to change . . .

Write down Three Things In Your External Environment that Concern You



# Becoming a Strategic Thinker

Are you ready?



# Four Elements of Successful Strategies

1. Clear and engaging purpose
2. Understanding of the external environment
3. Appreciation of internal strengths and challenges
4. Effective implementation



# Results

- What is required?
- What is the benefit?
- What does change mean for my agency?
- Follow-through on the Reflective Learning questions for this module in your Manual



# A Model for looking at Change

- Thinking through CHANGE
- Acting on CHANGE
- Seeing the CHANGE
- Knowing What Needs to Continue for CHANGE



Source: Our Iceberg is Melting (2006). John P. Kotter, Holger Rathgeber, Peter Mueller



# 8 Step Change Process

## SET THE STAGE

### 1. **Create a sense of urgency.**

Help others to see the need for change and the importance of acting immediately.

### 2. **Pull together the Guiding Team.**

Make sure there is a powerful group guiding the change – one with leadership skills, bias for action, credibility, communications ability, authority and analytical skills.



# 8 Step Change Process

## DECIDE WHAT TO DO

### 3. **Develop the Change Vision and Strategy.**

Clarify how the future will be different from the past and how you can make that future a reality.



# 8 Step Change Process

## MAKE IT HAPPEN

### 4. **Communicate for Understanding and Buy-in.**

Make sure as many others as possible understand and accept the vision and the strategy.

### 5. **Empower Others to Act.**

Remove as many barriers as possible so that those who want to make the vision a reality can do so.



# 8 Step Change Process

## 6. Produce Short-Term Wins.

Create some visible, unambiguous successes as soon as possible.

## 7. Don't Let up.

Press harder and faster after the first successes. Be relentless with instituting change after change until the vision becomes a reality.



# 8 Step Change Process

## MAKE IT STICK

### 8. Create a New Culture.

Hold on to the new ways of behaving and make sure they succeed, until they become a part of the very culture of the group.



# What is Required?

- Good connections with staff, community partners, policy groups, stakeholders and your family
- Supportive teams
- Working knowledge of the strategic planning process
- Concern about the issues
- Patience with the process!



# Strategic Change

**When You Return to Your Program, What Will You Do?**



# Take some time for YOURSELF

## Take the Challenge

### Have Fun!



# THANK YOU

If you have questions . . . you can reach me at

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