



OPERATIONS

EdFuel's *Blueprint for Success* initiative aims to address a looming talent deficit in the education field, developing many more highly effective K-12 system leaders capable of managing complex and dynamic organizations. To support the field in strengthening talent pipelines, one element of this initiative is the development of competency maps that articulate the essential competencies (specific skills, knowledge, and relationships) for non-instructional roles in school district/network central offices. These maps will provide the foundation for an aligned, proactive approach to developing non-instructional school district/network leaders.

WHAT THIS MAP IS:

The *Blueprint for Success* includes seven functional competency maps (academics and instruction, advocacy, development, information and data, finance, operations, and talent) to show the knowledge, skills, and relationships necessary to manage school districts/networks. In addition to the functional competency maps, EdFuel's *Blueprint for Success* provides a separate *Leadership Map* that covers cross-functional leadership skills. The *Leadership Map* should be viewed alongside each functional map to cover the full set of leadership and function-specific skills required.

The *Operations Competency Map*, developed in collaboration with school district and network operations leaders and field experts, represents the functional abilities necessary for the breadth of operations roles typically within school districts or networks. This map is not prescriptive of an ideal set of roles within the operations function. It is designed to be modular and customizable so that organizations can reconfigure the competencies described according to their own roles, titles, and structures.



Copyright © 2015 by EdFuel. This work is licensed under a Creative Commons Attribution-NonCommercial-ShareAlike 4.0 International License.



ORGANIZATION OF THIS MAP:

The *Operations Map* is specifically designed to highlight the critical skills needed across operations departments. Competencies fall within these categories:

 OPERATIONS MANAGEMENT	 FACILITIES MANAGEMENT	 ORGANIZATIONAL STRATEGY
<p>Ensuring effective operations at both the central office and across the school network</p>	<p>Creating and implementing school facilities strategy and processes, including acquisitions and capital improvements</p>	<p>Leading the organization's strategy and planning process</p> <p><i>NOTE: This category is not specific to operations, but rather, covers the skills required for successful organization-wide strategic planning. It is included on this map because the strategy department often reports to the COO; however, this category could be moved and combined with other departments or functions depending on an organization's structure and approach to strategic planning.</i></p>

Each competency is described at four organizational levels. While organizational structures and titles will vary, the table below gives sample job titles and descriptions to illustrate the levels:

COMPETENCY MAP LEVEL	SAMPLE JOB TITLES	DESCRIPTION
Individual Contributor	Operations Associate, Business Analyst, Office Manager, IT Administrator	<ul style="list-style-type: none"> Executes operations tasks within specific, individual workstreams May be focused specifically within one area of operations management (e.g., facilities, IT, food service, security) or may provide analysis and management support across operations departments
Manager	Operations Manager, Strategic Planning Manager, Facilities Manager, IT Manager	<ul style="list-style-type: none"> Leads a team within operations department, overseeing projects and daily activities Typically monitors a project or department budget in addition to team management responsibilities
Senior Manager/ Director	Director of Operations, Director of Strategic Planning, Director of Real Estate, Chief of Staff	<ul style="list-style-type: none"> Leads operations department or multiple teams across the department Sets strategic direction for operations, oversees department budgets, and coordinates with other departments to incorporate organizational priorities into operations planning
Executive/ Officer	Chief Operating Officer	<ul style="list-style-type: none"> Operational leader of the organization and core member of leadership team Leads multiple departments or teams Sets strategy and vision for organization and ensures that organization is positioned to achieve short- and long-term goals Ensures alignment within operations and across the organization to ensure that schools operate successfully on a daily basis



DESIGN PRINCIPLES THAT GUIDED DEVELOPMENT OF THE COMPETENCY MAPS:

- **ACTION-ORIENTED:** Competencies are described in action-oriented language to encourage the design of development experiences and training approaches that will support individuals' growth in these areas.
- **ADDITIVE:** To avoid repetition, the competency levels build on one another, meaning that there is an expectation that senior level skills are also inclusive of those that precede it.
- **ANCHORED IN THE ENVISIONED FUTURE STATE:** As articulated in EdFuel's *Map the Gap* report, the education field is changing and dynamic; the competencies reflect what will be required of leaders over the next decade to achieve greater impact in this constantly-evolving field.
- **BEST IN CLASS:** Competency descriptions incorporate leading examples from best in class organizations in education reform and the private sector, and reflect key findings from *Map the Gap*.
- **CUSTOMIZABLE TO DIFFERENT ORGANIZATIONS' VALUES:** The competencies are intended to be adaptable to each organization based on its own culture and values; therefore, the competency maps will not explicitly state a set of required values or elements of an organizational culture.
- **MODULAR:** The functions and levels within competency maps are not the same as job titles; organizations of various sizes and stages of maturity can group various competencies according to their unique organizational structures and roles.

POTENTIAL AUDIENCES AND USES OF THE COMPETENCY MAP:

The *Operations Competency Map* is designed to support a wide variety of talent development efforts. The following is a non-comprehensive set of audiences and potential applications of this map:

- An individual—either within or outside the education field—can reference the map to understand the nature of the work and competencies required for academics roles, and as a guide to potential opportunities to better understand and develop such skills
- Departmental leaders could use the map as the basis for a competency-based evaluation system for their academics staff, and for an aligned set of development opportunities to bolster the department's performance
- Districts and charter school network leaders can reference the map to understand potential capacity or capability gaps within their academics departments
- Education nonprofit organizations—especially those focused on talent development—can use the maps to tailor their programming and professional development to the specific needs of individual functions, and to the specific needs of individuals as they grow within functions

ACKNOWLEDGMENTS:

The *Operations Competency Map* was created in partnership with the Bridgespan Group and leaders of school districts, charter school networks, and field experts. We would especially like to thank the following working group members for their participation: Liz Genco, Senior Director of School Operations, Achievement Schools, Achievement School District; Chris Hines, Chief Operating Officer, Crescent City Schools; Ahkilah Johnson, Senior Director of Facilities, Uncommon Schools; Mike Madden, Chief Operating Officer, Noble Network of Charter Schools; Reid Phillips, Chief Operating Officer, Ednovate, Inc.; Zach Rossley, Chief Operating Officer, Achievement Schools, Achievement School District; Ken Zeff, Chief Strategy & Innovation Officer, Fulton County Schools.





OPERATIONS MANAGEMENT

- Operations planning and delivery
- School and district/network service delivery
- Development and implementation of procedures and policies
- Monitoring operational performance
- Organizational compliance
- School security and safety
- Risk mitigation and contingency planning
- Crisis management
- Procurement and contract management



FACILITIES MANAGEMENT

- Facilities planning
- Facilities management and maintenance
- School openings and closures
- New facility acquisition
- Capital improvements



ORGANIZATIONAL STRATEGY

- Organization-wide strategic planning
- Strategic plan implementation
- Measurement and improvement
- School portfolio management and growth planning
- Special projects and initiatives

KNOWLEDGE REQUIRED TO EXECUTE SUCCESSFULLY ON THESE COMPETENCIES:

- Service delivery expectations
- Financial, budget, and resource allocation processes
- Local, state, and federal compliance requirements

- Local, state, and federal facilities policies
- Facilities options/structures
- Facilities financing
- Design options and building specifications

- Organization's goals and impact of strategic decisions
- Political, education, and funding landscape
- Factors and criteria that inform growth plans

KEY RELATIONSHIPS TO DEVELOP AND MANAGE:

- Board
- Management team
- School leaders and teachers
- School districts/charter operators
- Vendors and service providers

- Finance team
- School leaders
- School districts/charter operators
- Facilities funders
- Vendors and service providers

- Board
- Management team
- School leaders
- Funders
- External stakeholders (e.g., community members, politicians)



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
FINANCIAL ANALYSIS	<ul style="list-style-type: none"> Executes operational activities and meets service delivery expectations Resolves operational issues, elevating larger issues 	<ul style="list-style-type: none"> Coordinates team efforts across projects to meet service delivery expectations Manages resolution of operational issues, elevating larger issues 	<ul style="list-style-type: none"> Plans service delivery and projects requiring multiple processes and teams Reviews and prioritizes operational issues and guides department to resolution 	<ul style="list-style-type: none"> Defines operational vision and strategy aligned with organization's strategy Sets expectations for service delivery in collaboration with school leaders, balancing academic and operational objectives Ensures resolution of operational issues Communicates operational health and issues to management team and Board
SCHOOL AND DISTRICT/NETWORK SERVICE DELIVERY	<ul style="list-style-type: none"> Executes service delivery and coordinates with other teams across school sites (e.g., transportation, food services) Supports vendor services Conducts equipment checks elevating when something requires fixing or upgrading 	<ul style="list-style-type: none"> Coordinates team's service delivery Monitors vendor services and gathers and provides feedback to vendors 	<ul style="list-style-type: none"> Defines workstreams and processes Delegates services across schools and central office departments 	<ul style="list-style-type: none"> Ensures coordination and consistent delivery of school and district/network services Decides which services should be provided centrally
DEVELOPMENT AND IMPLEMENTATION OF PROCEDURES AND POLICIES	<ul style="list-style-type: none"> Implements operating procedures and policies 	<ul style="list-style-type: none"> Guides implementation of operating procedures and policies and recommends opportunities to update 	<ul style="list-style-type: none"> Develops operating procedures and policies Develops a cycle of continuous improvement for procedures and policies Ensures written policies are kept current in the face of changing practices and that all staff are regularly trained 	<ul style="list-style-type: none"> Ensures organization has operating procedures and policies that meet local, state, and federal policies Develops a cycle of continuous improvement for procedures and policies Ensures written policies are kept current in the face of changing practices and that all staff are regularly trained



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
MONITORING OPERATIONAL PERFORMANCE	<ul style="list-style-type: none"> Analyzes operational performance and actual expenses against budget, as well as key economic drivers (e.g., facilities utilization) Elevates deviations from metrics and budget 	<ul style="list-style-type: none"> Coordinates process for monitoring performance Reviews performance Elevates reasons for variance Elevates strategies to improve performance 	<ul style="list-style-type: none"> Monitors performance against metrics and budget Implements strategies to improve performance 	<ul style="list-style-type: none"> Defines operational metrics with school leaders Ensures usage of accountability systems (e.g., scorecards, dashboards) Ensures operational and budgetary performance meet goals Ensures economic drivers are optimized to improve sustainability
ORGANIZATIONAL COMPLIANCE	<ul style="list-style-type: none"> Executes operational activities in compliance with local, state, and federal requirements 	<ul style="list-style-type: none"> Monitors operations to ensure alignment with compliance standards Compiles compliance reports 	<ul style="list-style-type: none"> Creates compliance standards and monitoring processes Manages reporting requirements 	<ul style="list-style-type: none"> Ensures that the organization is compliant with requirements Ensures timeliness of all compliance reporting Creates a culture of transparency and responsiveness with authorities regarding compliance issues
SCHOOL SECURITY AND SAFETY	<ul style="list-style-type: none"> Implements security guidelines Acts on emergency security procedures 	<ul style="list-style-type: none"> Supervises security activities and personnel Coordinates staff readiness to deal with emergency security issues 	<ul style="list-style-type: none"> Develops school security guidelines and delegates responsibilities Plans emergency security procedures, incorporating state and national standards 	<ul style="list-style-type: none"> Sets vision for security and safety across organization Asserts leadership in security emergencies
RISK MITIGATION AND CONTINGENCY PLANNING	<ul style="list-style-type: none"> Minimizes common operational risks (e.g., power outages) Executes on contingency plans 	<ul style="list-style-type: none"> Coordinates implementation of risk mitigation plans Prepares organization to act on contingency plans 	<ul style="list-style-type: none"> Identifies operational risks and institutes risk mitigation processes Develops and guides use of contingency plans 	<ul style="list-style-type: none"> Ensures organization can manage unexpected operational situations Oversees contingency planning



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
CRISIS MANAGEMENT	<ul style="list-style-type: none"> Quickly responds to school crises 	<ul style="list-style-type: none"> Executes plan to handle and manage crisis Executes mitigation necessary to contain implications of a given crisis 	<ul style="list-style-type: none"> Develops crisis management processes and guides short- and long-term solutions Prepares plan to handle crises and works with leaders to ensure they know key actions and steps Develops plan to mitigate potential future issues, and recommends course of action to executives 	<ul style="list-style-type: none"> Sets expectations for crisis management and ensures quick response to crises Communicates with key stakeholders to manage and contain crises Anticipates and mitigates any “domino effect” that may result from a given crisis
PROCUREMENT AND CONTRACT MANAGEMENT	<ul style="list-style-type: none"> Researches vendor services and provides input into selection process 	<ul style="list-style-type: none"> Prepares analysis to recommend improvements to vendor contracts 	<ul style="list-style-type: none"> Negotiates vendor contracts and leverages scale Ensures diversification of vendors 	<ul style="list-style-type: none"> Leads procurement and contract management process Negotiates provision of services by external organizations (e.g., transportation)



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
FACILITIES PLANNING	<ul style="list-style-type: none"> Conducts analysis for development of facilities plan (e.g., which facilities to acquire, how much capital is required) 	<ul style="list-style-type: none"> Conducts development of facilities plan Contributes to facilities planning based on knowledge of design options and building specifications/systems for schools 	<ul style="list-style-type: none"> Defines core priorities and delegates required analysis Creates facilities plan, covering both acquisitions and maintenance, based on implications for operations and finances Creates facilities design solutions to utilize space according to school needs 	<ul style="list-style-type: none"> Determines facilities plan in line with organizational resources and equitable resource allocation Decides on facilities priorities (e.g., acquisitions planning, sequencing maintenance projects) and recommends to leadership team and Board
FACILITIES MANAGEMENT AND MAINTENANCE	<ul style="list-style-type: none"> Supports management and maintenance of facilities according to local, state, and federal policies 	<ul style="list-style-type: none"> Guides team's management and maintenance of facilities Conducts day-to-day interactions with school leaders Supervises facilities personnel 	<ul style="list-style-type: none"> Defines processes and guidelines for managing and maintaining facilities Stewards relationships with school leaders Oversees vendors 	<ul style="list-style-type: none"> Set expectations for facilities management and maintenance aligned with facilities plan and relevant policies
SCHOOL OPENINGS AND CLOSURES	<ul style="list-style-type: none"> Executes steps related to school openings and closures 	<ul style="list-style-type: none"> Coordinates execution of school openings and closures 	<ul style="list-style-type: none"> Guides critical decisions for school openings/closures (e.g., allocation of resources across the organization) 	<ul style="list-style-type: none"> Sets expectations for school opening/closure processes Provides air cover and troubleshooting during execution
NEW FACILITY ACQUISITION	<ul style="list-style-type: none"> Researches and elevates facilities opportunities and budgets for each 	<ul style="list-style-type: none"> Prepares research of facilities opportunities and elevates promising opportunities 	<ul style="list-style-type: none"> Proposes facilities opportunities (and associated budgets) to COO 	<ul style="list-style-type: none"> Recommends acquisitions based on needs and long-term implications to leadership team and Board Engages with funders to raise required capital
CAPITAL IMPROVEMENTS	<ul style="list-style-type: none"> Assesses facilities conditions and assists in capital improvement projects Elevates capital improvement needs and budgets for each 	<ul style="list-style-type: none"> Composes assessment of facilities conditions and capital improvement projects Elevates capital improvement needs 	<ul style="list-style-type: none"> Defines process and guidelines for assessing facilities conditions and capital improvement needs Determines capital improvements to make Negotiates with vendors and holds accountable to contracts 	<ul style="list-style-type: none"> Sets expectations for facilities conditions Decides which capital improvements to make and, with CFO, how to fund them



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
ORGANIZATION-WIDE STRATEGIC PLANNING	<ul style="list-style-type: none"> Performs research and analysis Identifies trends and surfaces insights 	<ul style="list-style-type: none"> Guides research and analysis Elevates insights to inform strategic decisions Works with departments and teams to inform organization-wide strategic plan, and to embed priorities in department-level plans 	<ul style="list-style-type: none"> Develops strategic plan, facilitating cross-functional process to determine priorities and required resources Defines core questions and delegates analysis Reviews analysis, understanding the potential impact of strategic decisions, to elevate recommendations Serves as a resource for department-level strategy development, building alignment and coordination across the organization 	<ul style="list-style-type: none"> Facilitates management team and Board to deliver an organization-wide strategic plan that focuses all departments on shared goals and priorities Ensures strategic decisions are informed by political, education, and funding landscape Ensures organization-wide strategic plan drives department planning, and sets high expectations for alignment and coordination
STRATEGIC PLAN IMPLEMENTATION	<ul style="list-style-type: none"> Supports delivery of goals and activities across departments 	<ul style="list-style-type: none"> Supports departments to create implementation plans to achieve strategic priorities Elevates the necessary resources and support to implement strategy 	<ul style="list-style-type: none"> Drives communication of organization's strategy across departments Translates strategic plan into goals and strategic priorities for each department Sequences priorities over short- and long-term Proposes resources and support to implement strategy 	<ul style="list-style-type: none"> Champions strategic plan as organization-wide priority Allocates resources across organization to accomplish strategy Holds departments accountable for success against milestones



COMPETENCY	INDIVIDUAL CONTRIBUTOR	MANAGER	SENIOR MANAGER/DIRECTOR	EXECUTIVE/OFFICER
MEASUREMENT AND IMPROVEMENT	<ul style="list-style-type: none"> Collects and analyzes data to measure progress towards goals Identifies improvements to the strategic plan 	<ul style="list-style-type: none"> Monitors organizational performance measurement system Reviews organizational performance and surfaces insights to inform improvements Serves as a resource for departments to support consistent performance management practices 	<ul style="list-style-type: none"> Defines key metrics for each department to measure impact Monitors effectiveness and progress toward strategic plan Recommends and prioritizes improvements Invests in department teams to build organization-wide capacity for measurement and improvement 	<ul style="list-style-type: none"> Sets vision for organizational performance measurement and improvement and champions as a priority for all teams Ensures organization is tracking against goals and metrics and recommends solutions to meet goals Ensures continuous improvement of activities to achieve strategic plan
SCHOOL PORTFOLIO MANAGEMENT AND GROWTH PLANNING	<ul style="list-style-type: none"> Analyzes performance of individual schools as well as drivers/risk factors for growth and contraction (e.g., past performance, capacity) Makes observations on portfolio performance and opportunities for growth and contraction 	<ul style="list-style-type: none"> Guides analysis of school portfolio and drivers/risk factors for growth and contraction Elevates insights about high- and under-performing schools and opportunities for growth and contraction 	<ul style="list-style-type: none"> Defines priorities and key metrics for analysis of school portfolio and opportunities for growth and contraction Identifies and delegates analysis Reviews analysis to inform discussions on how to manage portfolio of schools 	<ul style="list-style-type: none"> Facilitates portfolio management discussions with leadership team and Board Sets “greenlighting” criteria for growth and contraction and recommends go/no-go decisions Interfaces with politicians and funders to acquire buy-in and support
SPECIAL PROJECTS AND INITIATIVES	<ul style="list-style-type: none"> Assists in execution of special projects and initiatives 	<ul style="list-style-type: none"> Coordinates special projects and initiatives Identifies barriers or delays and surfaces to management team as appropriate 	<ul style="list-style-type: none"> Determines special projects and initiatives, reprioritizing resources to accomplishing projects Ensures special projects and initiatives deliver results and course correct as needed 	<ul style="list-style-type: none"> Prioritizes projects and initiatives Sets expectations for explicit timeline and deliverables Holds relevant team accountable to delivering results of special projects and initiatives



SOURCES:

1. "Aiming for the Top: A guide for aspiring COOs and their organizations." *EY*, [http://www.ey.com/Publication/vwLUAssets/Aiming_for_the_top/\\$FILE/EY-Aiming-for-the-top.pdf](http://www.ey.com/Publication/vwLUAssets/Aiming_for_the_top/$FILE/EY-Aiming-for-the-top.pdf).
2. "Chief Operating Officer Job Descriptions." *The Bridgespan Group*, <http://www.bridgespan.org/Publications-and-Tools/Hiring-Nonprofit-Leaders/Nonprofit-Job-Descriptions/Chief-Operating-Officer-Job-Descriptions.aspx>.
3. "Position Guide: Chief Strategy Officer CSO", *Enterprise Management Consulting*, <http://www.enterprisemanagementconsulting.com/ChiefStratefic%20Officer%20-Strategic%20Consultant%20Position%20Description.pdf>.
4. "The DNA of the COO: Time to claim the spotlight." *EY*, <http://performance.ey.com/wp-content/uploads/downloads/2014/06/EY-Performance-DNA-of-the-COO.pdf>.

