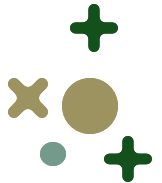


# Leadership and Strategy

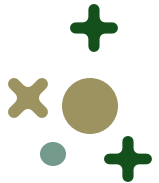


# Chapter 1

## Plan Strategically

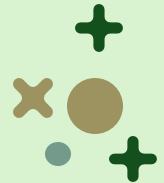


مرافق  
تدريب واستشارات



# Chapter 2

## Lead the FM Organization

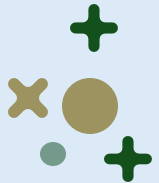


# Chapter 3

## Manage the FM Organization



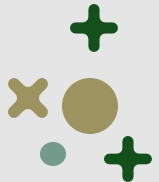
مرافق  
تدريب واستشارات





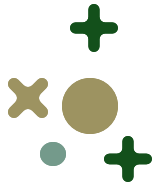
# Chapter 4

## Influence the Demand Organization



# Chapter 1

## Plan Strategically



# Content:

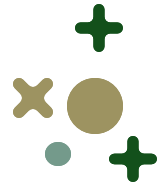
1- Introduction

2- Understanding

3- Analysis



مرافق  
تدريب واستشارات



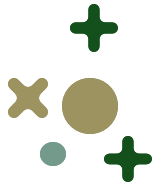
# Content:

4- Planning

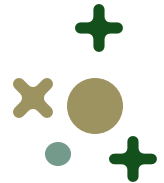
5- Acting



مرافق  
تدريب واستشارات

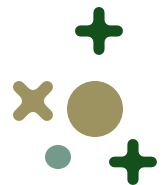


# 1- Introduction

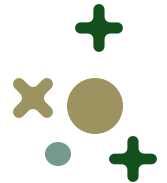




# What is a Strategy ?



# Strategic plan



# 1- Introduction

**1**

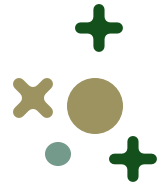
Purpose Level

**2**

Corporate level

**3**

FM Strategic Level



# 1- Introduction

**4**

Technical Leve

**5**

Execution Level

**6**

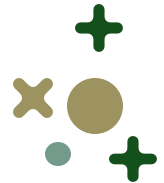
Measurement Level

**7**

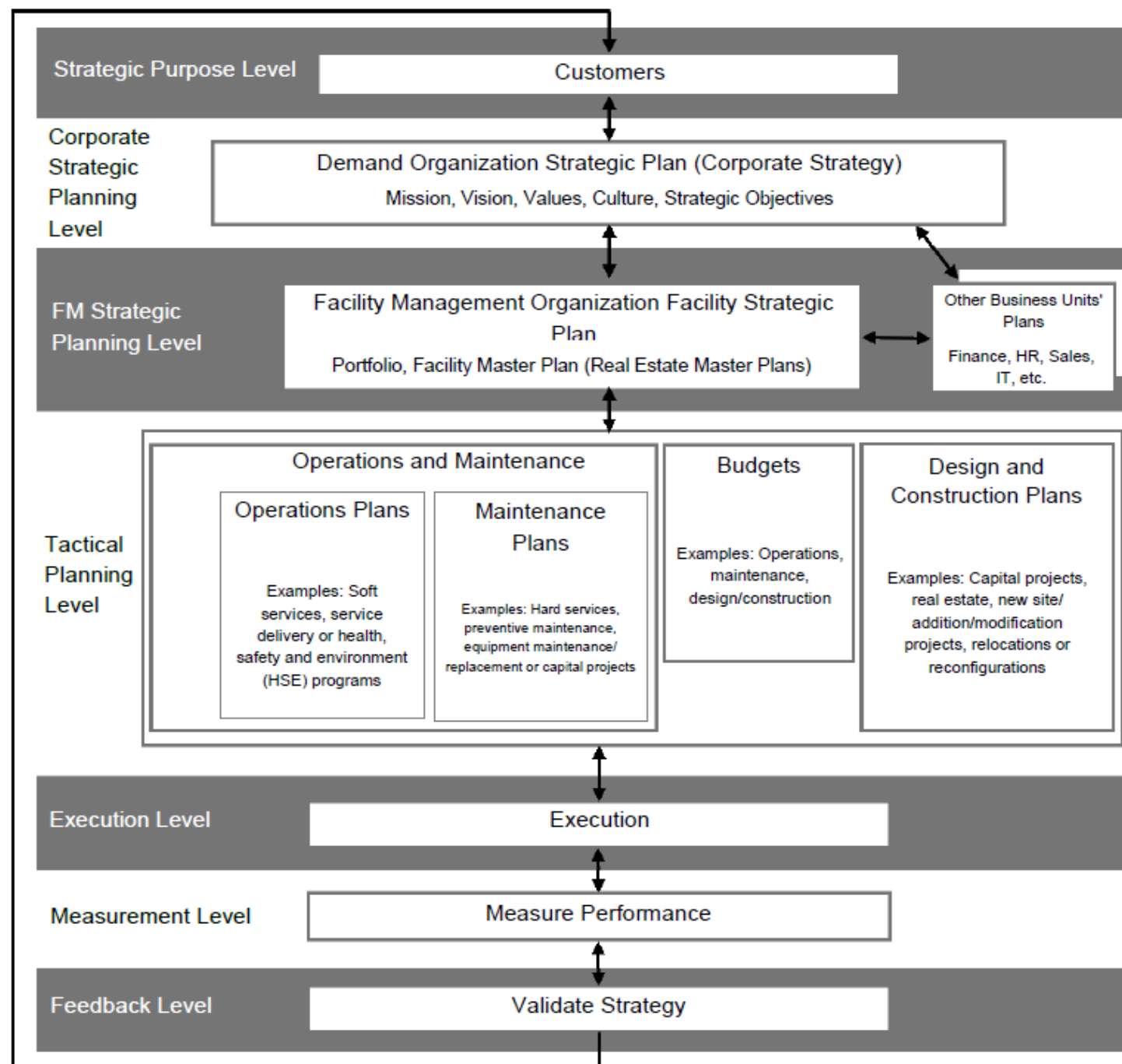
Feedback Level



مرافق  
تدريب واستشارات



# 1- Introduction

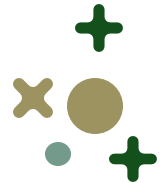


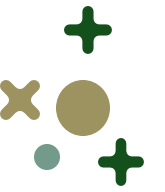


- Facility master plan
- Real estate master plan
- Campus plan

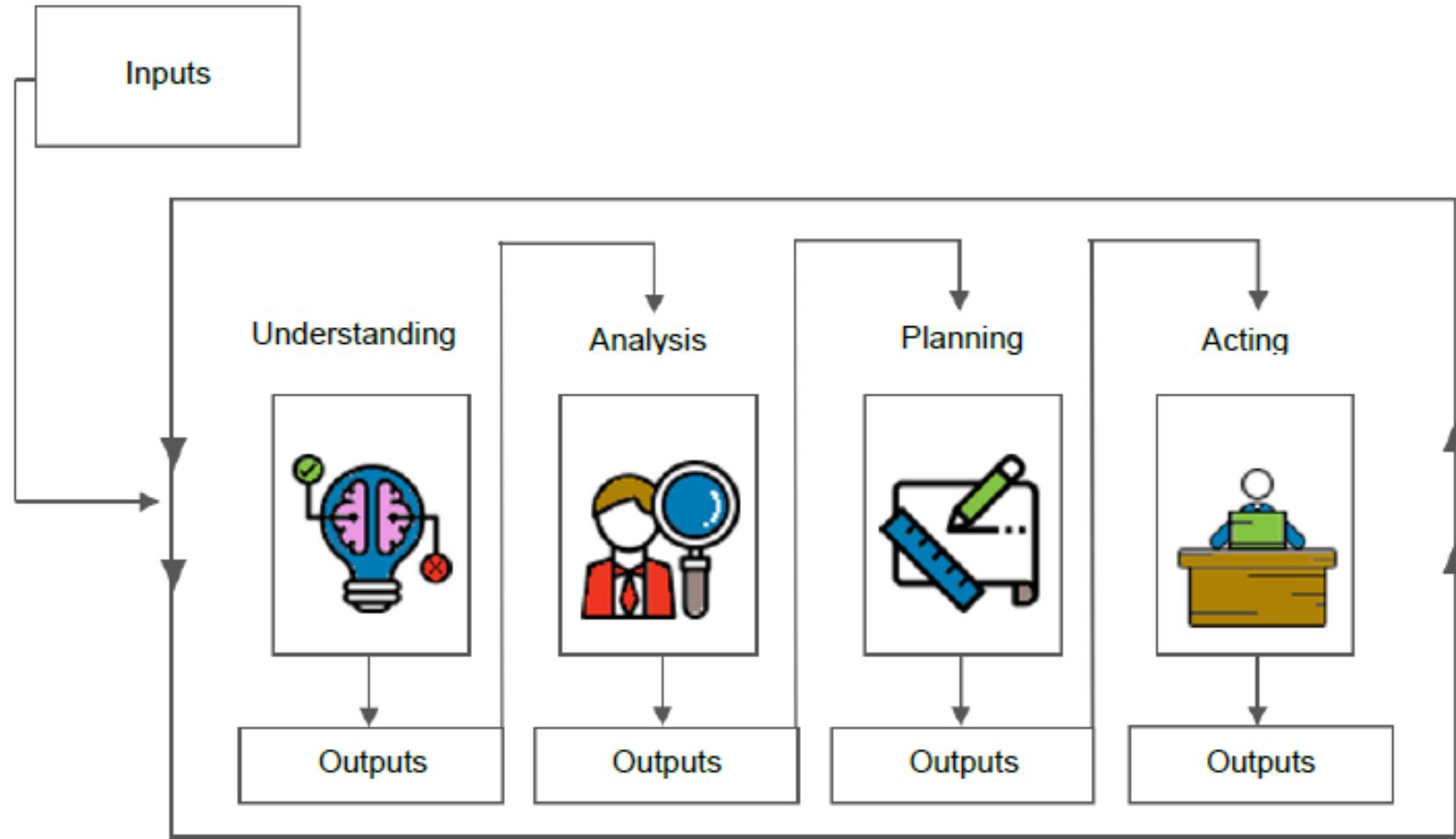


مرافق  
تدريب واستشارات

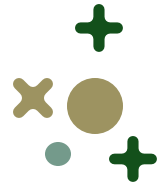




# Strategic plan



*Exhibit 1-3: Strategy Life-Cycle Model*



# 2- Understanding

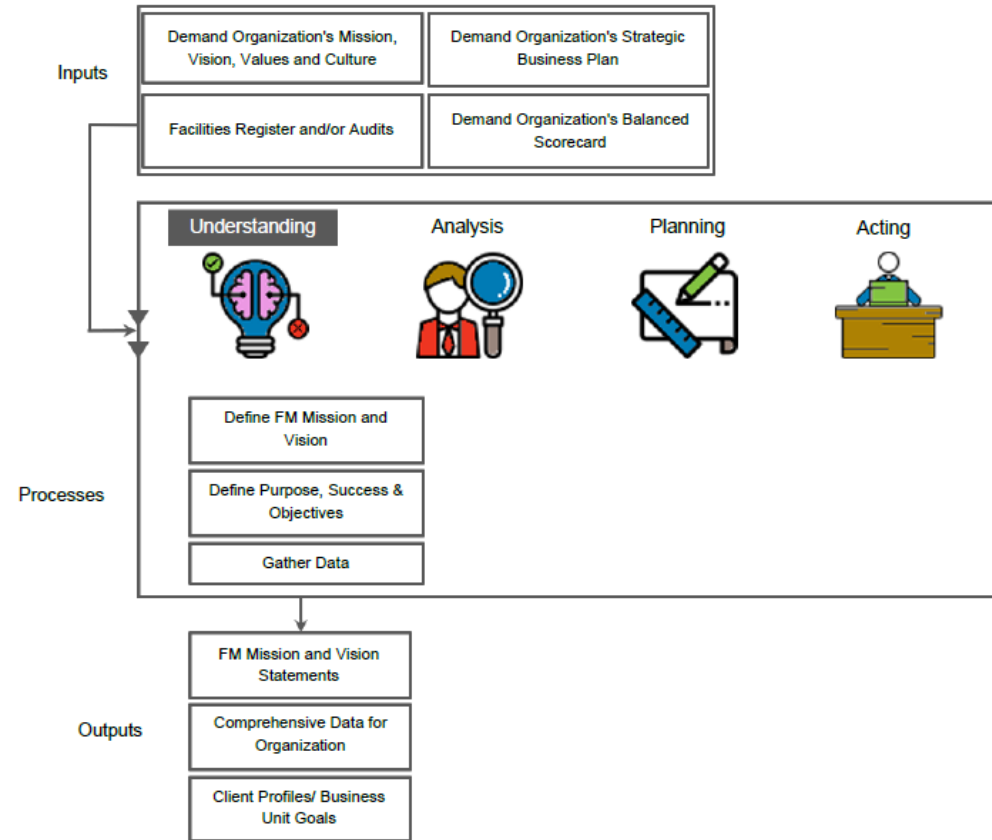
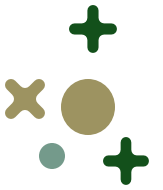
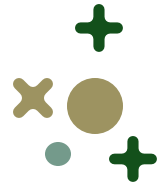
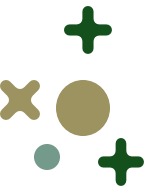


Exhibit 1-4: Strategy Life-Cycle Model (Understanding)





# Input:

- 1- Mission, Vision
- 2- Business Plan
- 3- Facilities Register
- 4- Balanced Scorecard

مركز  
تدريب واستشارات

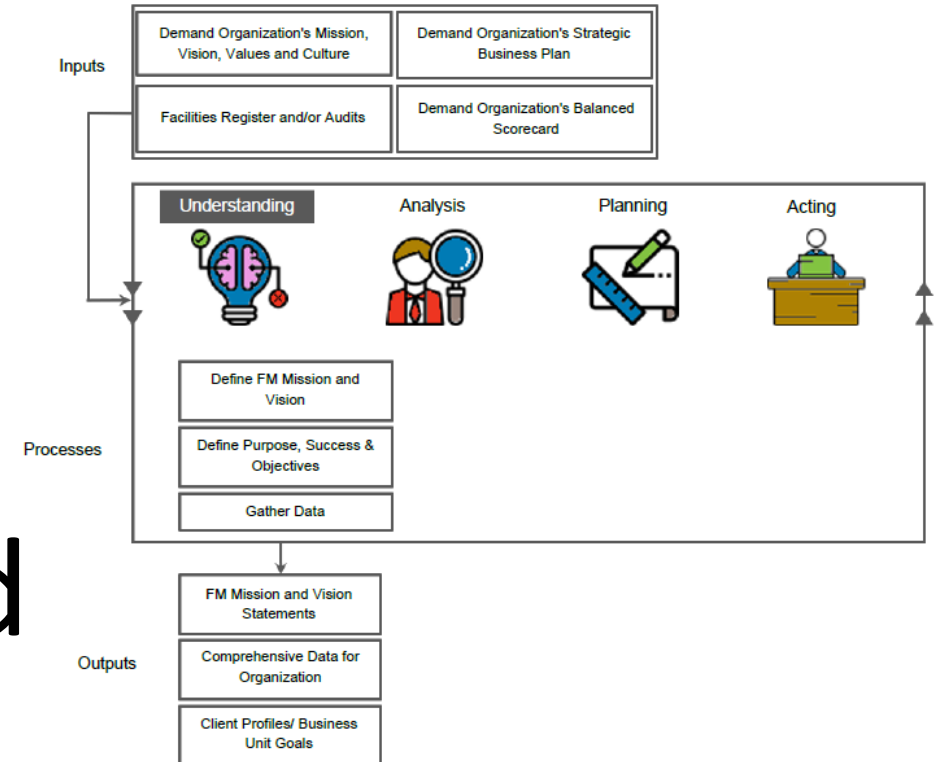
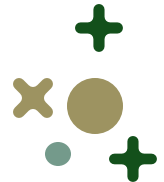


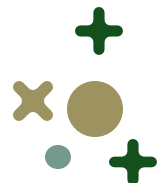
Exhibit 1-4: Strategy Life-Cycle Model (Understanding)



**Vision, Mission**

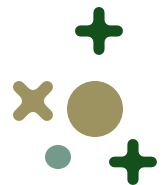
**Values**

**Culture**





# Demand Strategic Business Plan



# Balanced Scorecard (BCS)

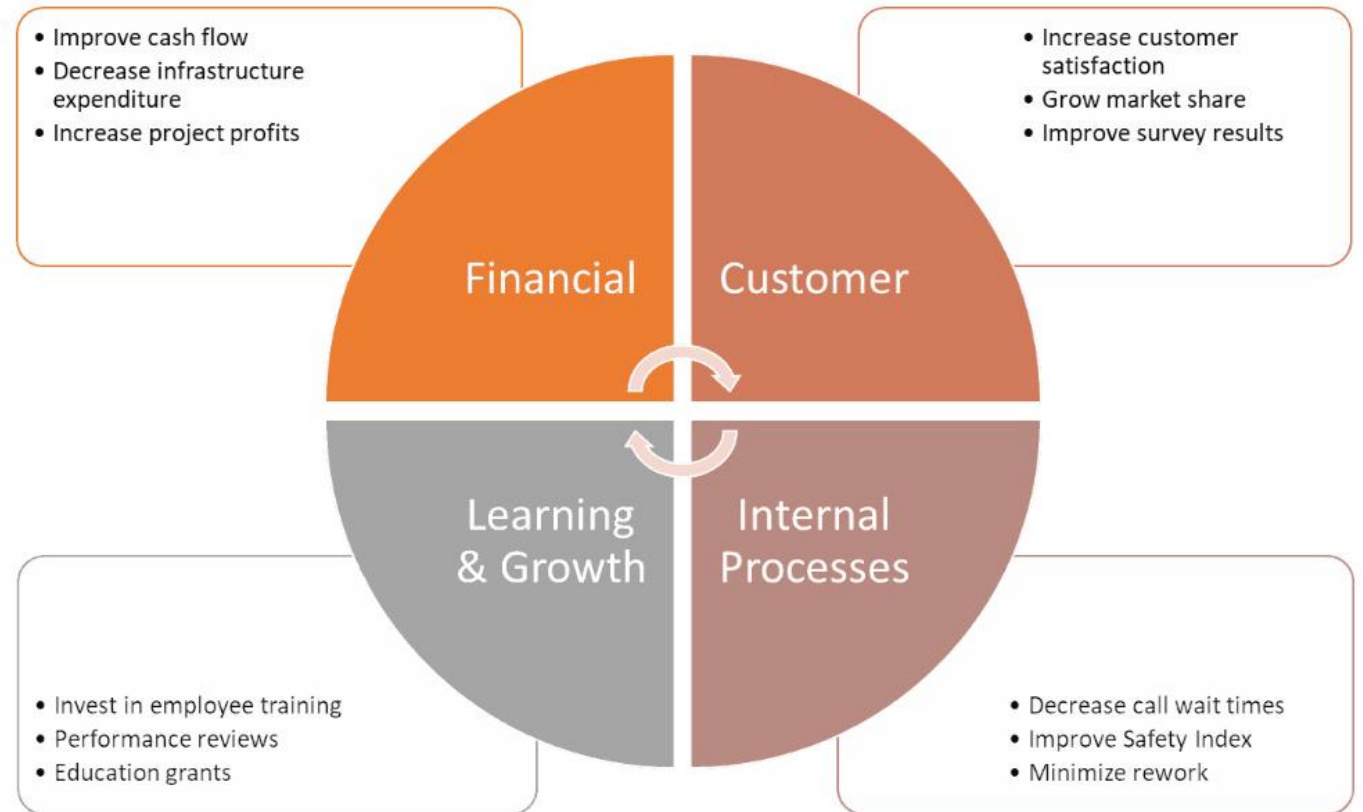
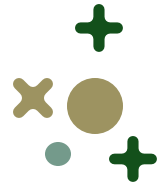
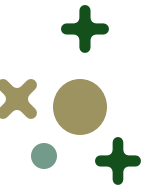
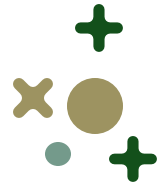


Image: Balanced scorecard in cycle format



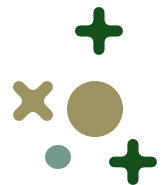
# Process:

- 1- FM Mission and Vision
- 2- Purpose, Success and Objectives
- 3- Gather Data



# Output:

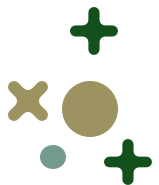
- 1- Vision and Mission Statement
- 2- Comprehensive Data
- 3- Client Profiles



# 3- Analysis



مرافق  
تدريب واستشارات





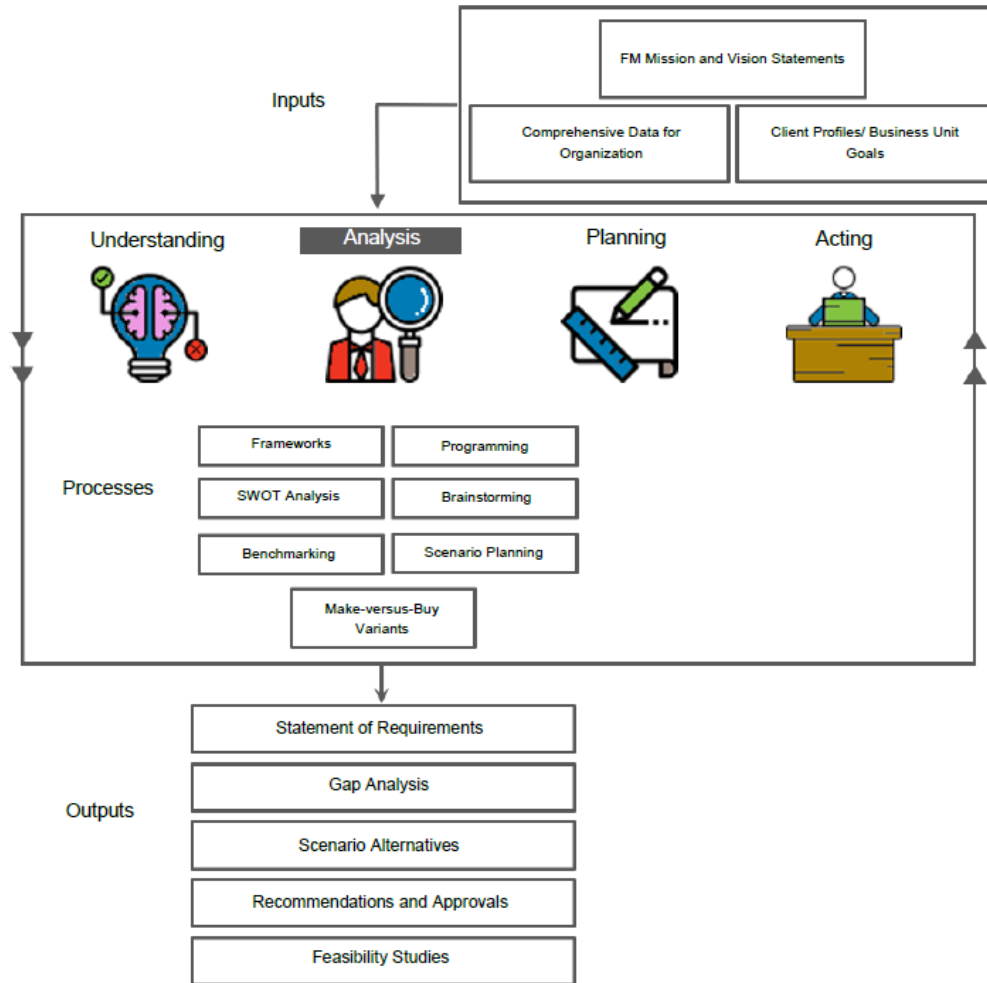
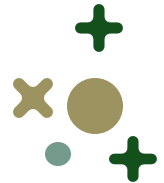


Exhibit 1-11: Strategy Life-Cycle Model (Analysis)

# Process:

- 1-Framework
- 2-Programming
- 3-SWOT Analysis
- 4-Brainstorming



# Process:

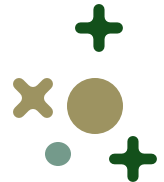
5-Benchmarking

6-Scenario Planning

7-Make-versus-buy



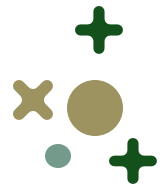
مرافق  
تدريب واستشارات



# Programming



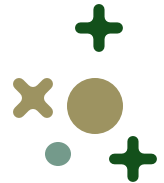
مرافق  
تدريب واستشارات



# SWOT Analysis



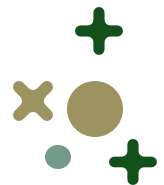
مرافق  
تدريب واستشارات



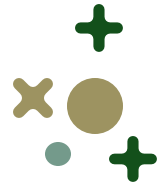
# Strategic Creative Analysis (SCAN)



مرافق  
تدريب واستشارات

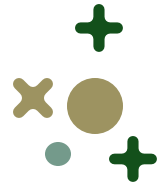


# Benchmarking





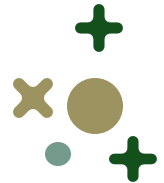
# Scenario Planning



# Make-versus- buy analysis

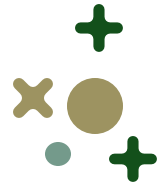
BUYING LEASING

مرافق  
تدريب واستشارات



# Output:

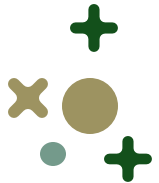
- 1-Statement of requirements
- 2-Gap analysis
- 3-Scenario alternatives



# 4- Planning



مرافق  
تدريب واستشارات



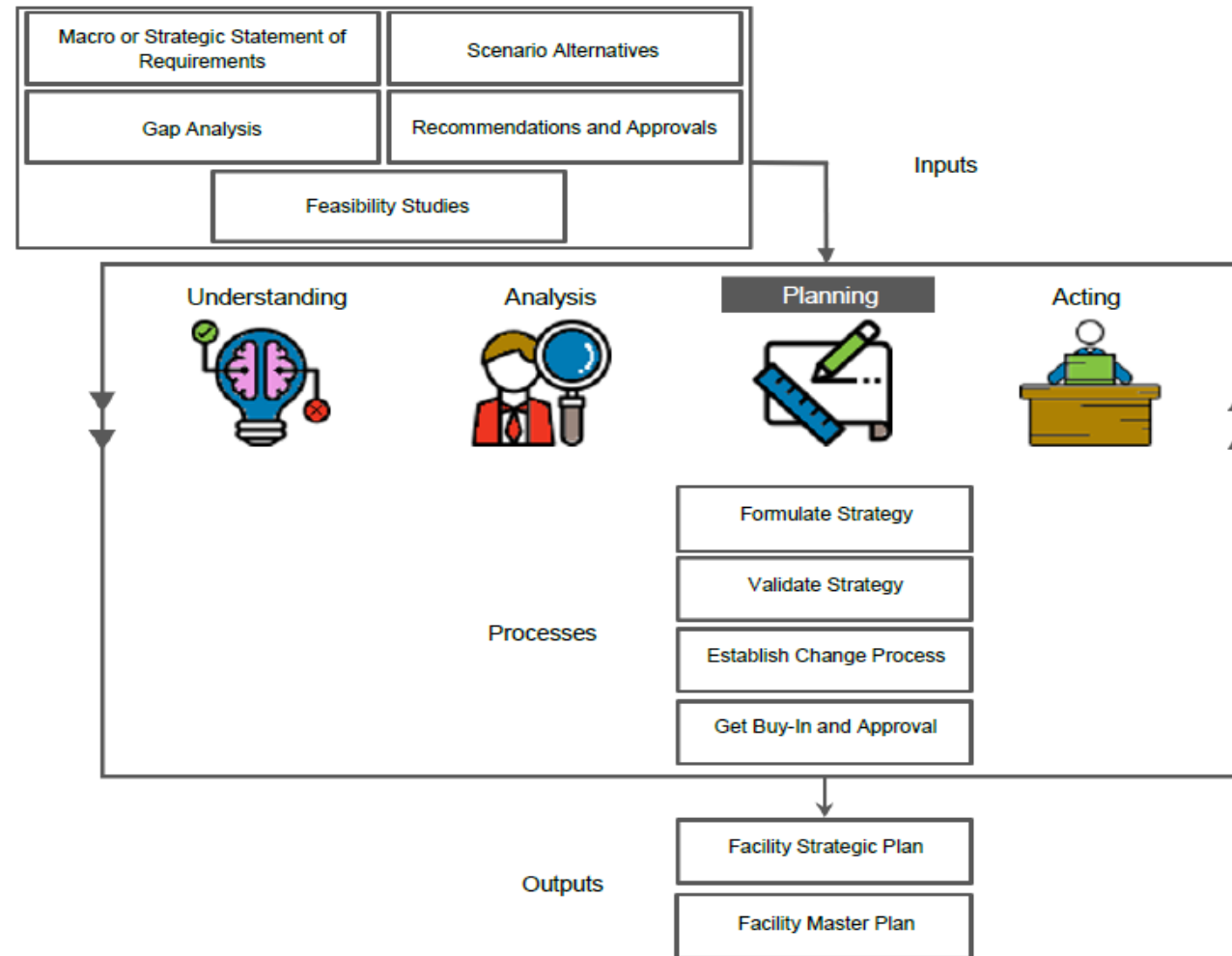


Exhibit 1-19: Strategy Life-Cycle Model (Planning)

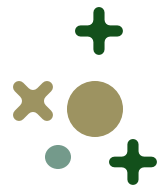


# Process:

- 1-Formulate Strategy
- 2-Validate Strategy
- 3-change process
- 4-buy-in and approval



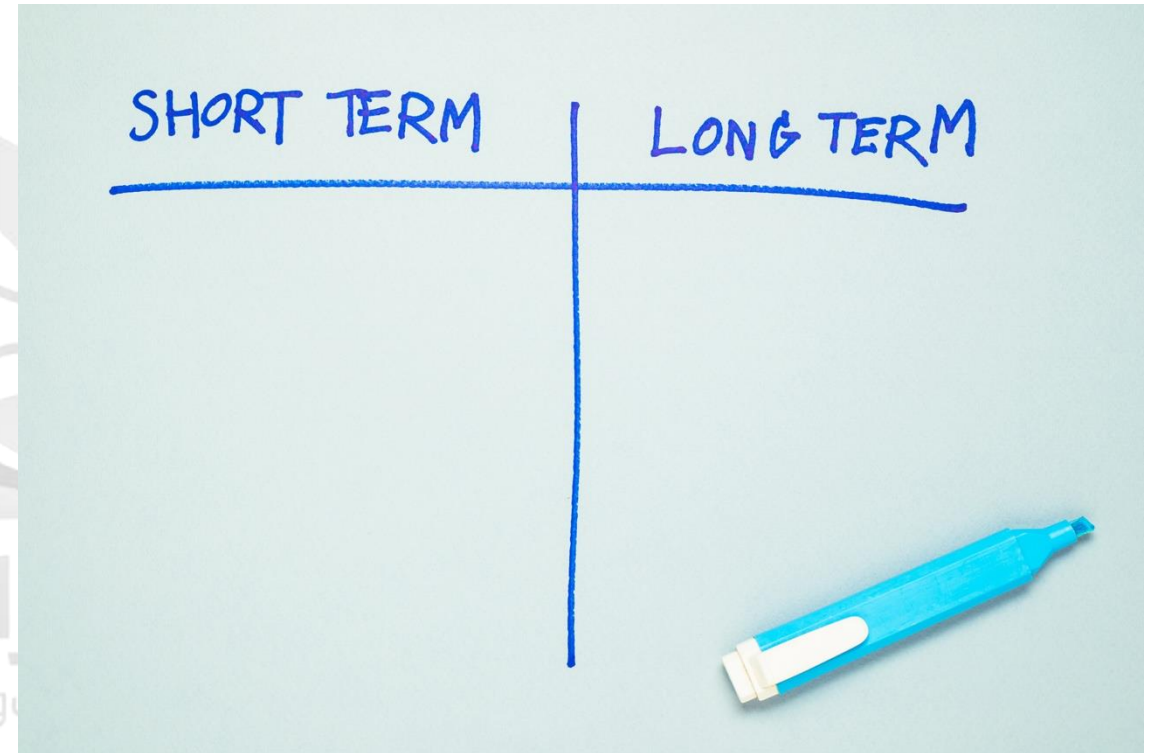
**PROCESS**





# Output:

- 1-Facility Strategic Plan
- 2-Facility master plan



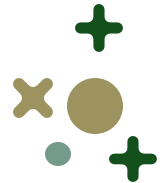
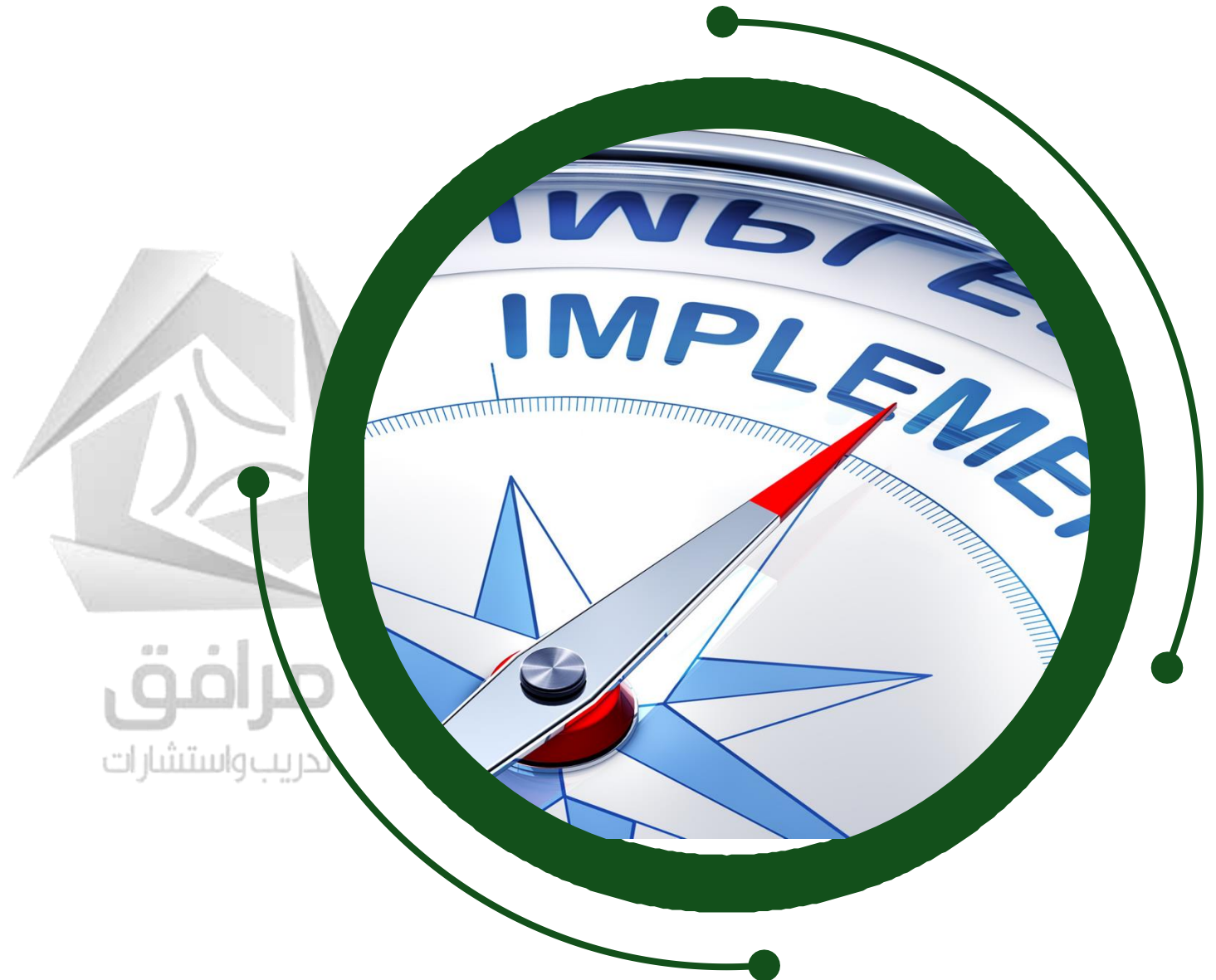


Facility Strategic Plan



Facility Strategic Plan

# 5- Acting



5- Acting

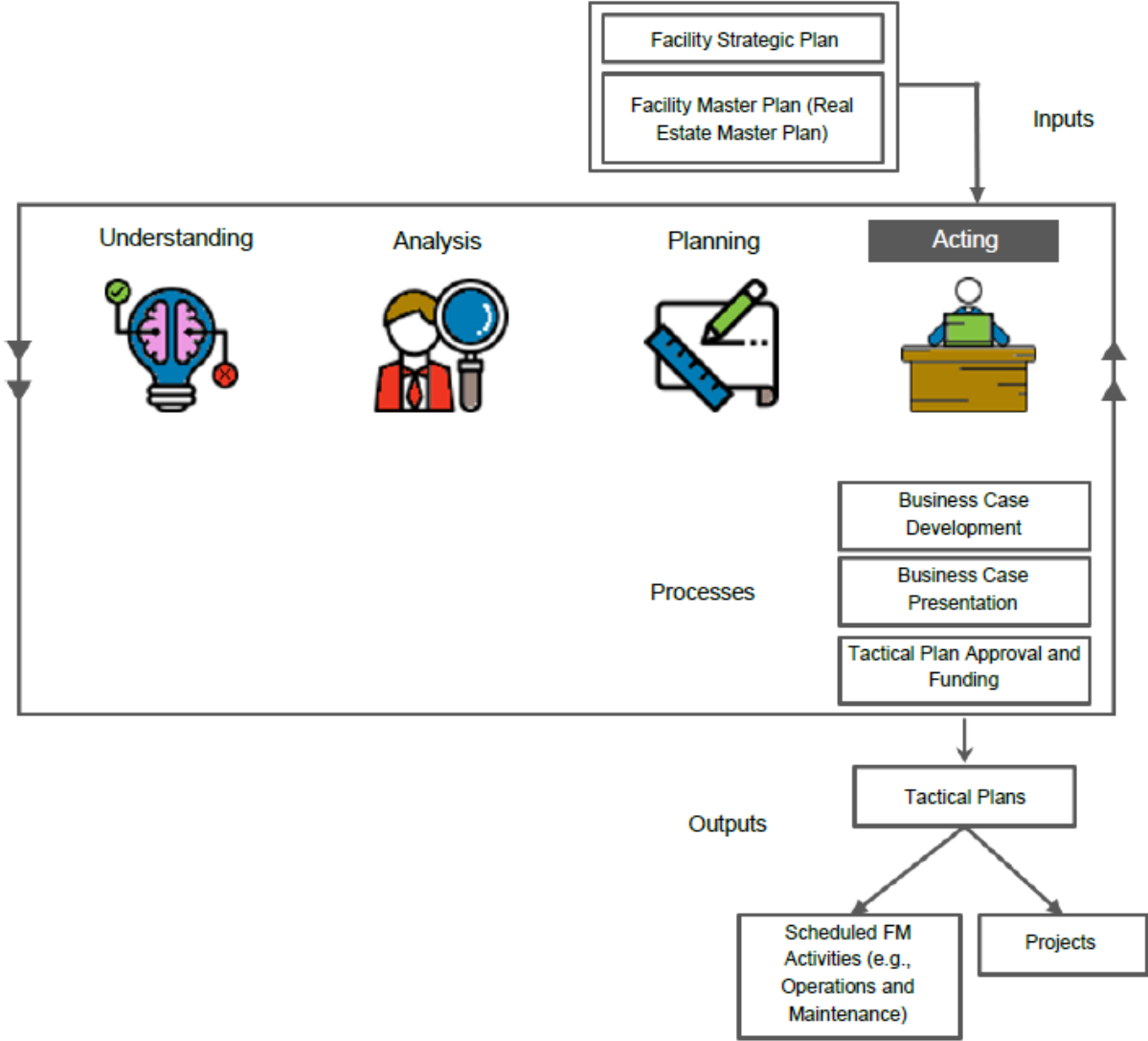
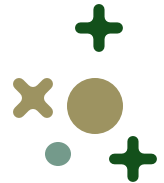


Exhibit 1-25: Strategy Life-Cycle Model (Acting)

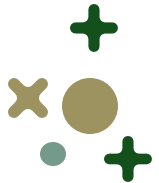
# Process:

- 1-Business Case Development
- 2-Business Case Presentation
- 3-Tactical Plan Approval and Funding



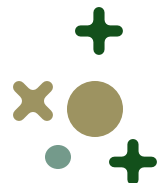
# Output:

## Tactical Plans



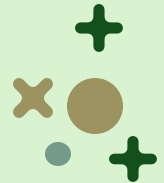


# Measuring and Evaluating performance



# Chapter 2

## Lead the FM Organization

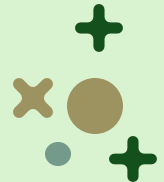


# Content:

- 1-Introduction
- 2-Theories
- 3-Lead & Inspire
- 4-Advocate FM



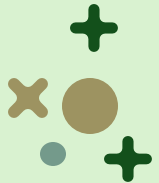
مرافق  
تدريب واستشارات



# 1-Introduction to Leadership and Management



مرافق  
تدريب واستشارات







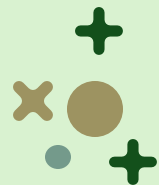
VS

مرافق  
تدريب واستشارات



# Position Power:

Legitimate Power  
Information Power  
Process Power



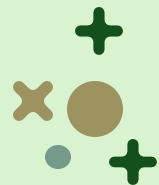


# Personal Influence :

Expert Power

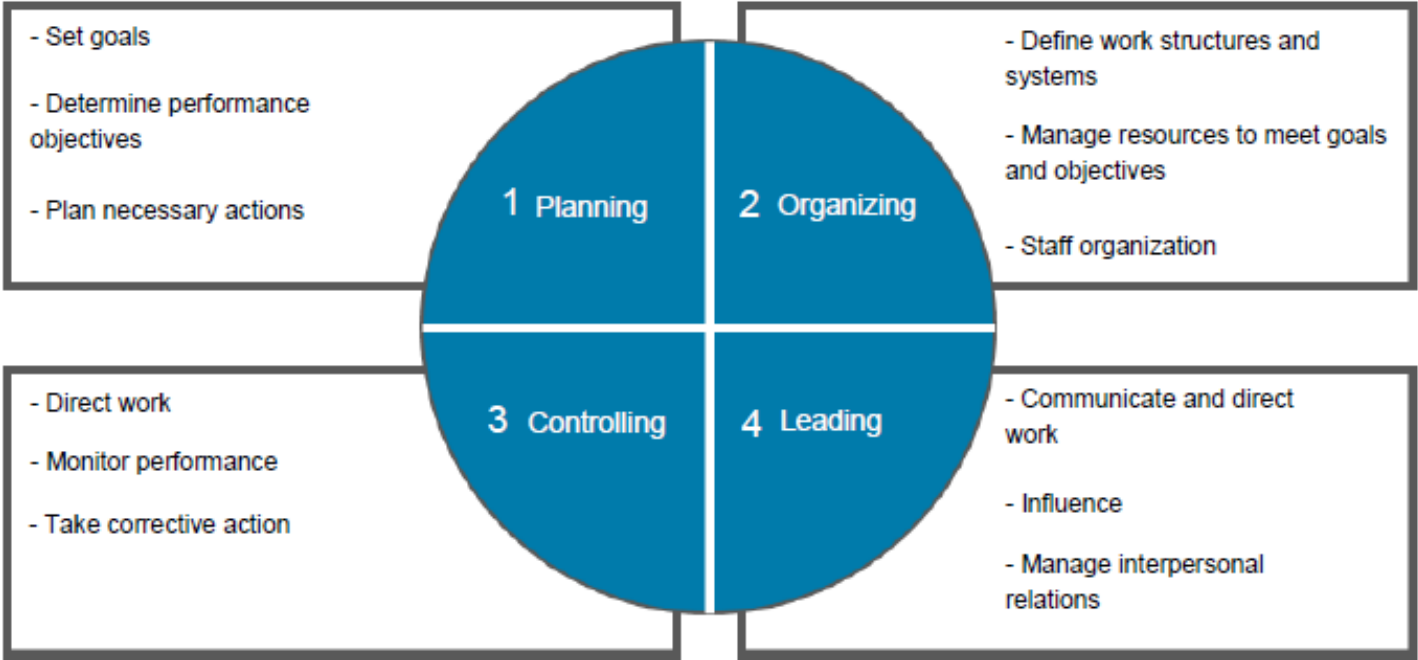
Rational Persuasion

Referent Power



*Exhibit 2-1* provides a management process model that places leading as an element in the management process.

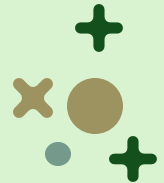
**Management (technical organization) + Leadership (style + direction) = Means to reach goal (alignment of FM/organization)**



*Exhibit 2-1: Management Process Model*

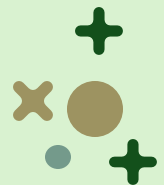
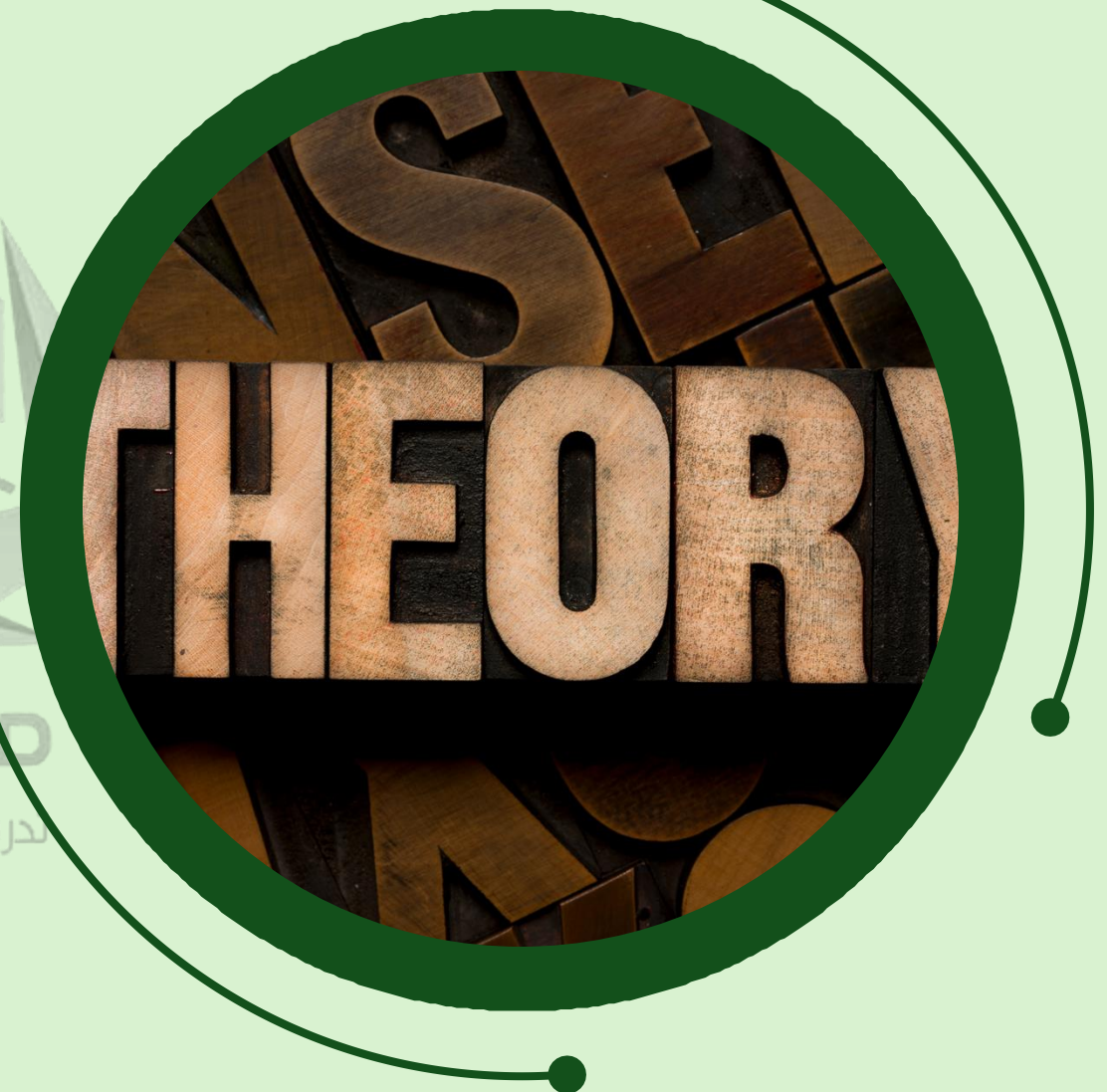
# 2-Theories of Individual Behavior and Leadership

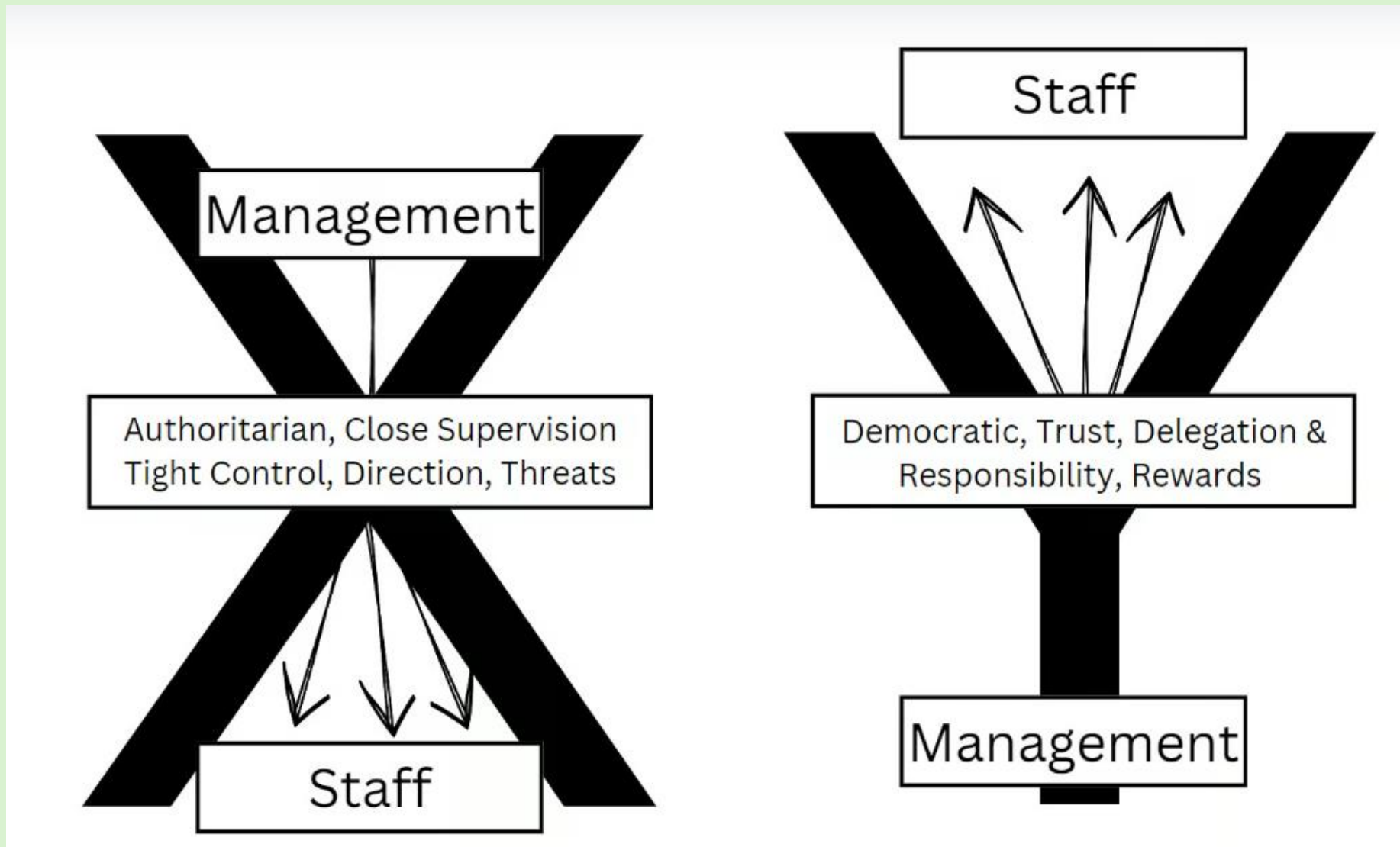
مرافق  
تدريب واستشارات



# Individual Motivation and Behavioral Theories

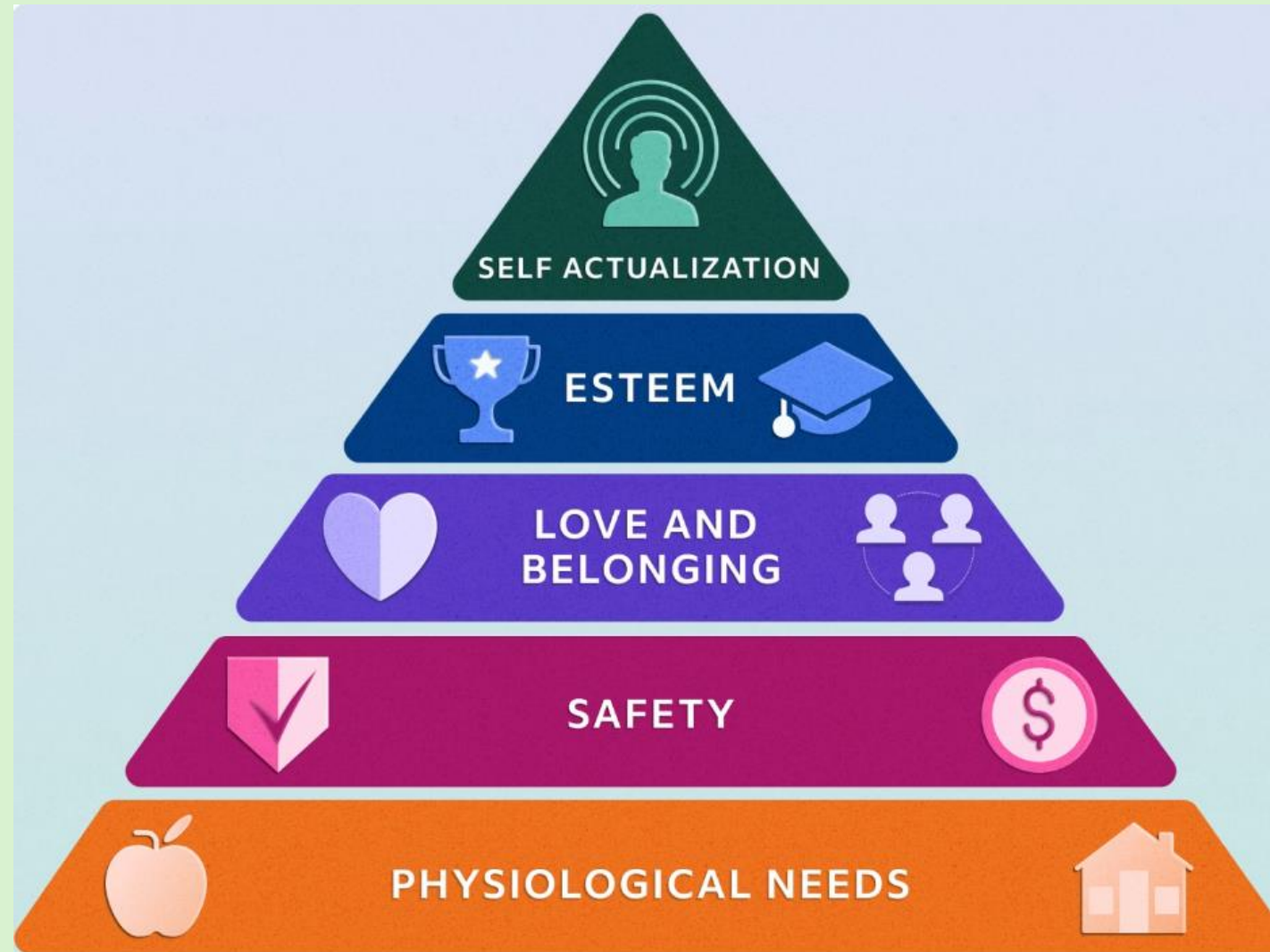
مرافق  
تدريب واستشارات





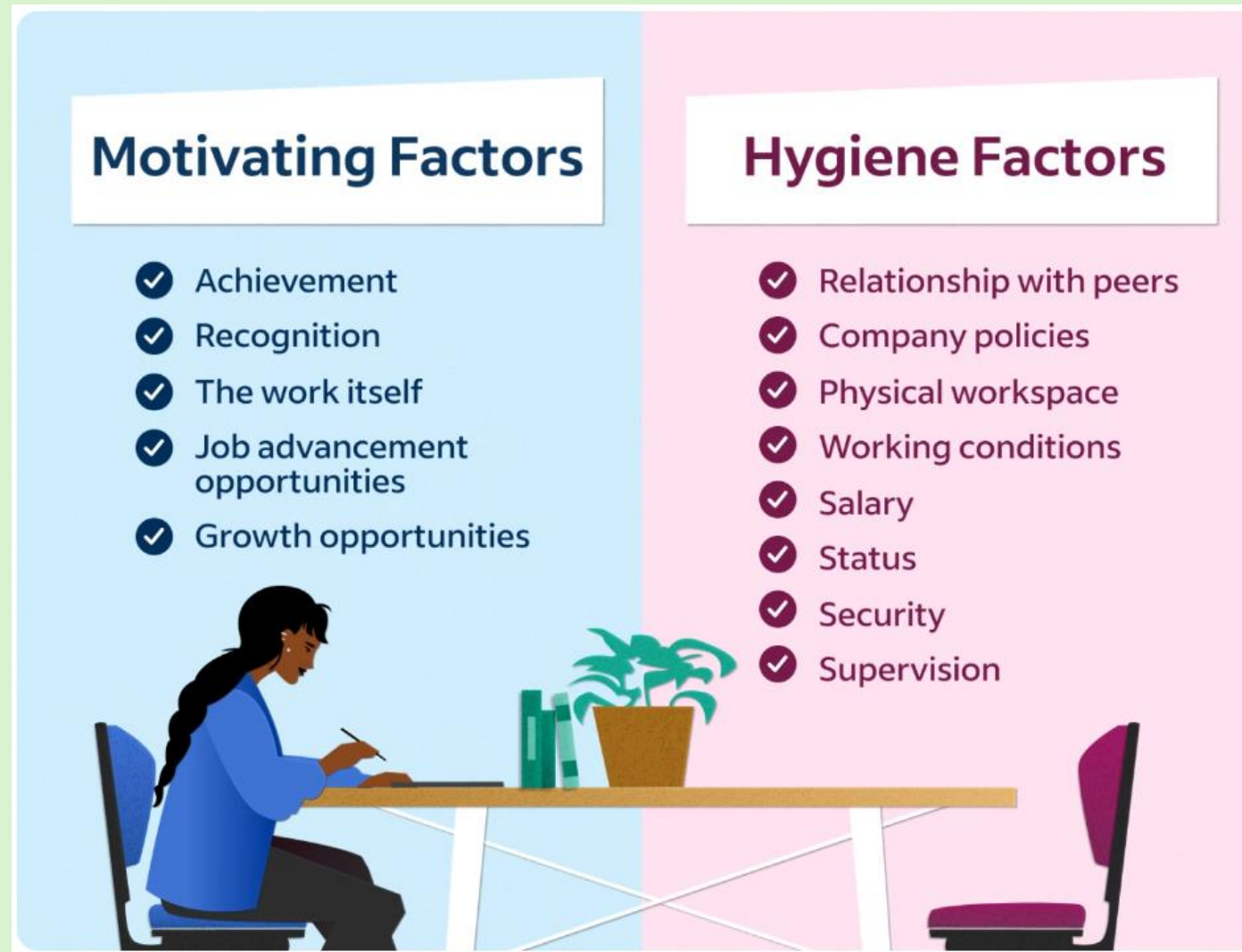
## Theory X and Theory Y (Douglas McGregor)



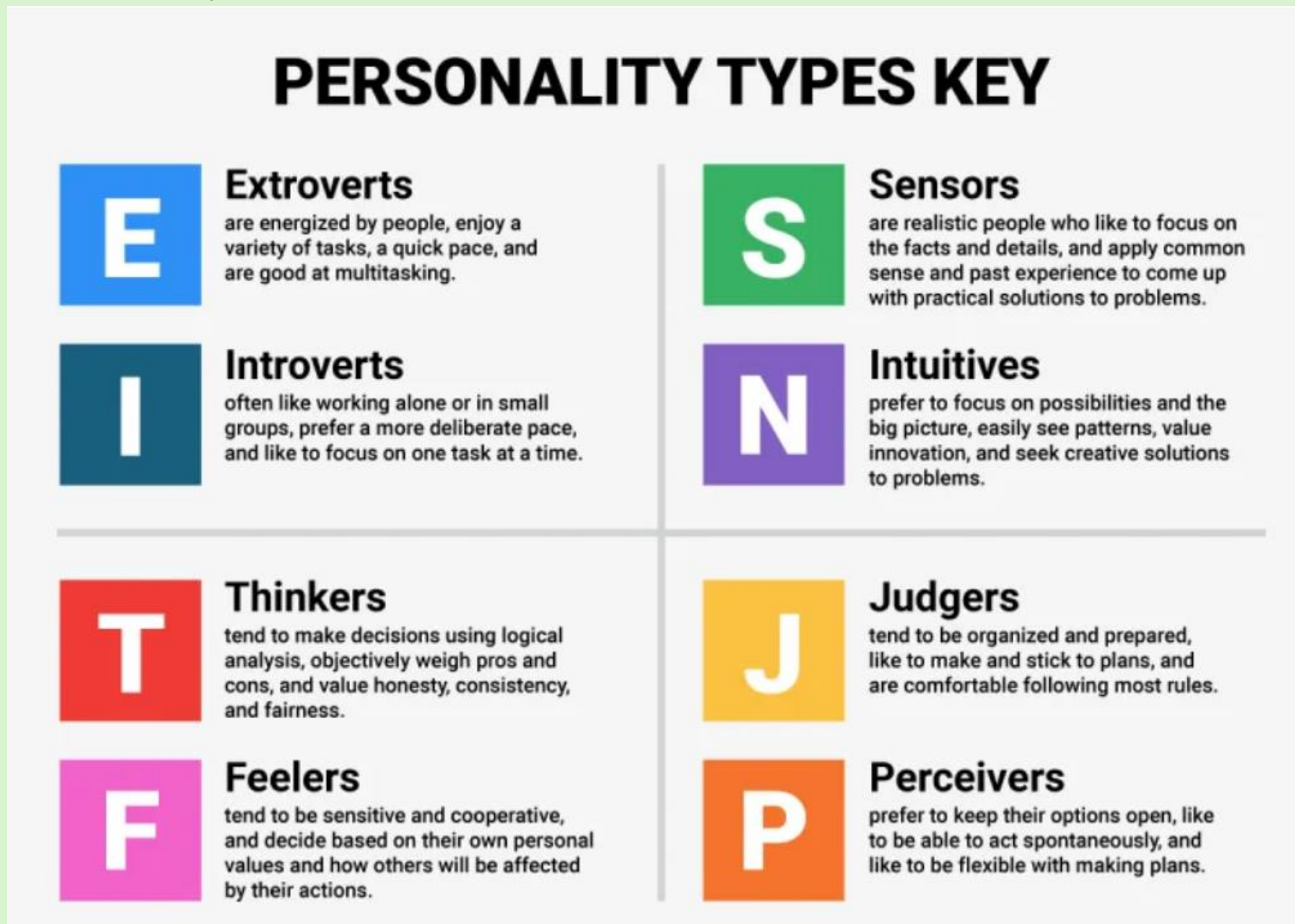


## Maslow's Hierarchy of Needs





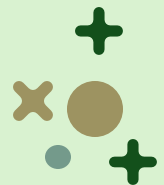
## Herzberg's Motivation-Hygiene Theory

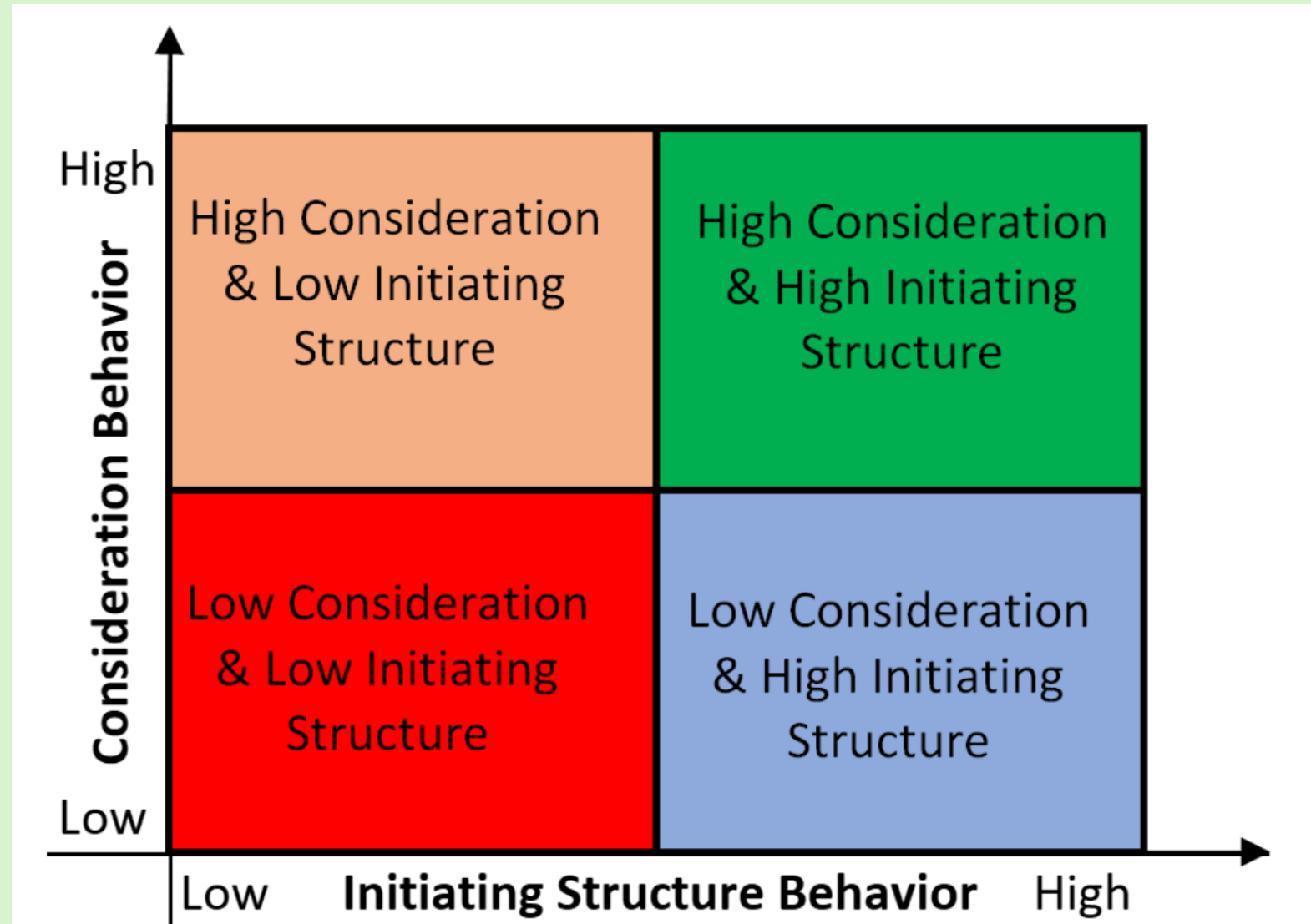


# Myers-Briggs Personality Types

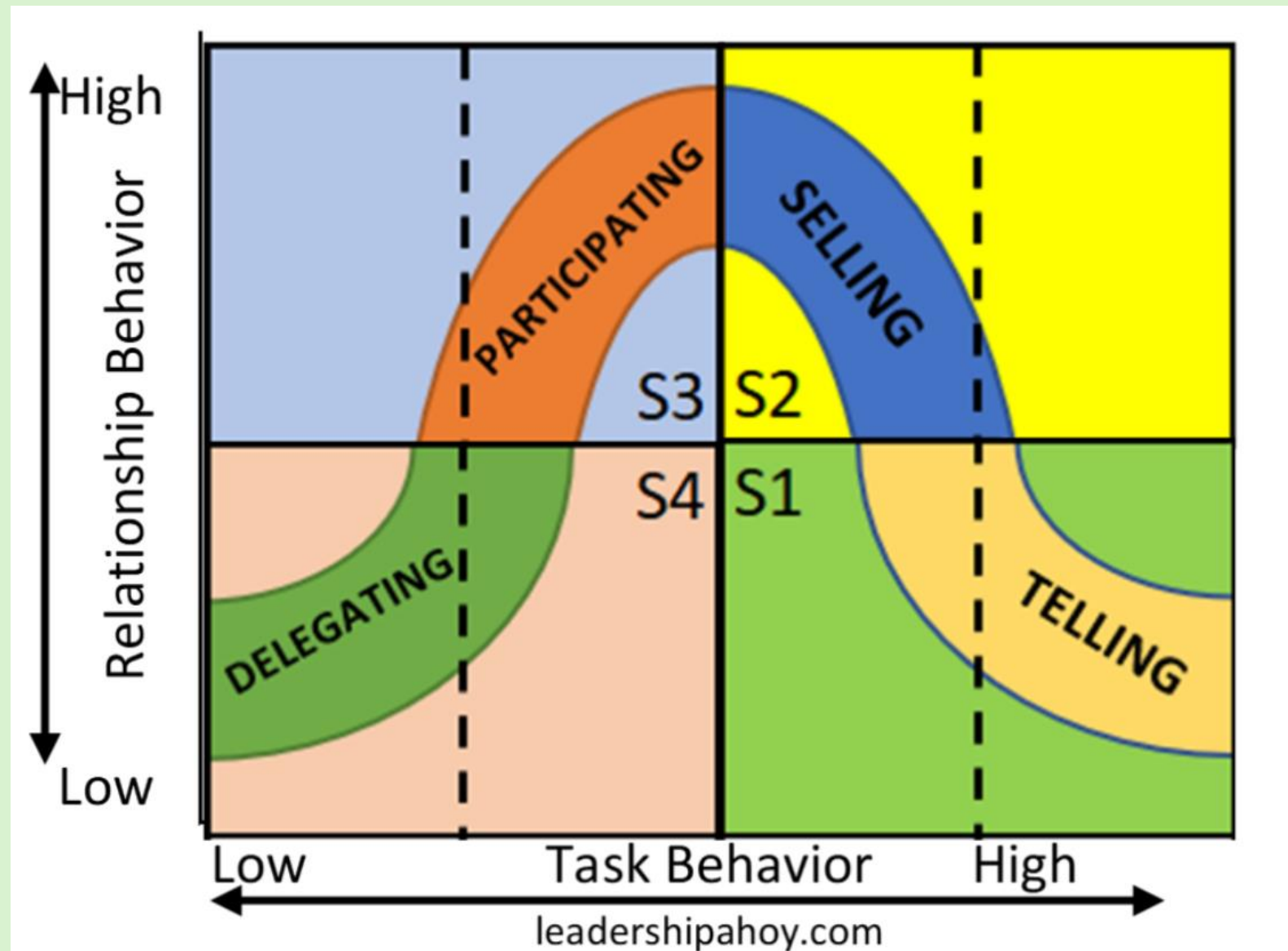
# Leadership Theories

مرافق  
تدريب واستشارات



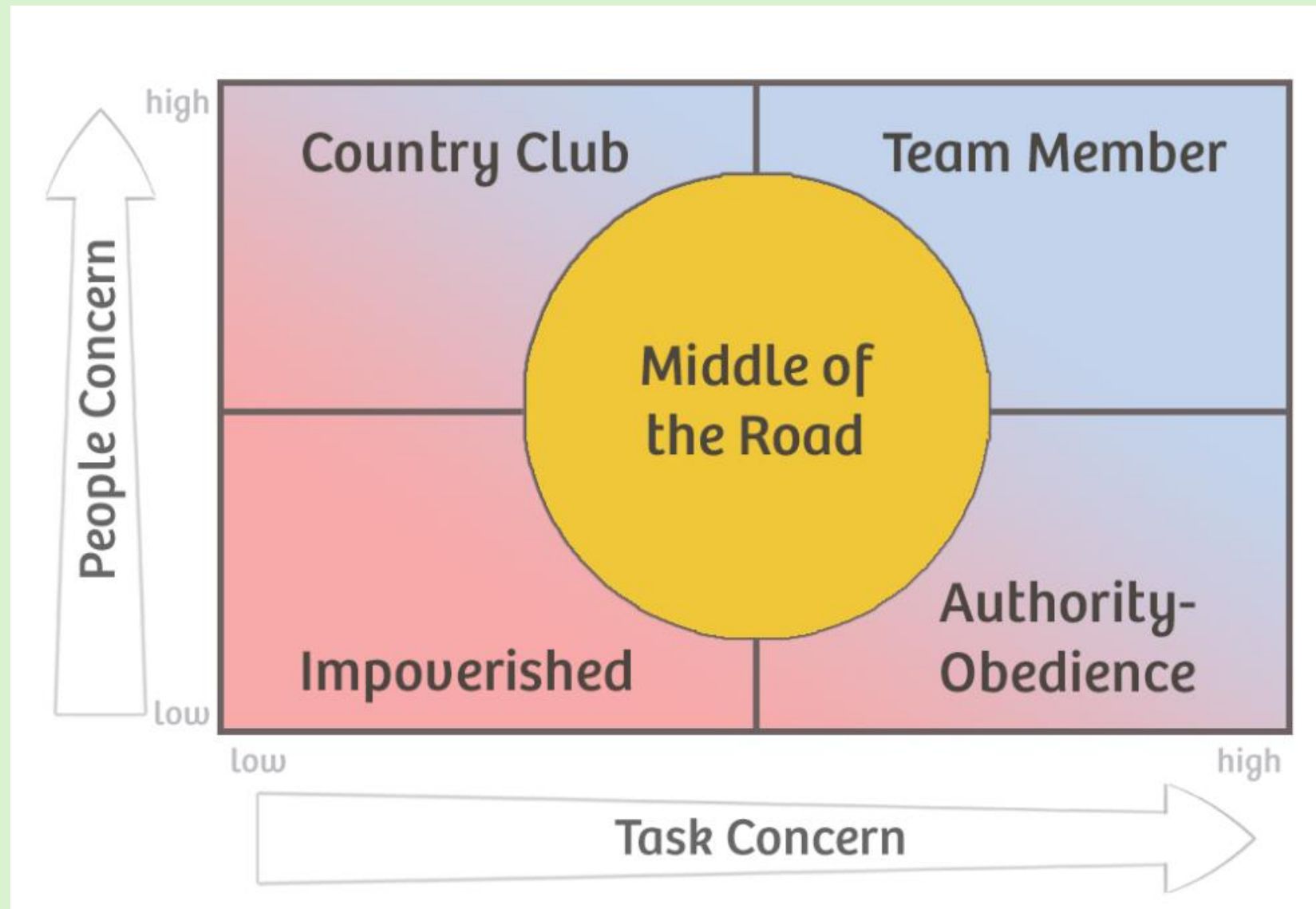


## Behavioral Theories (1940s)



## Situational Theories (1960s)



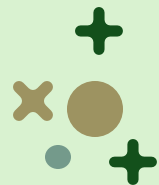
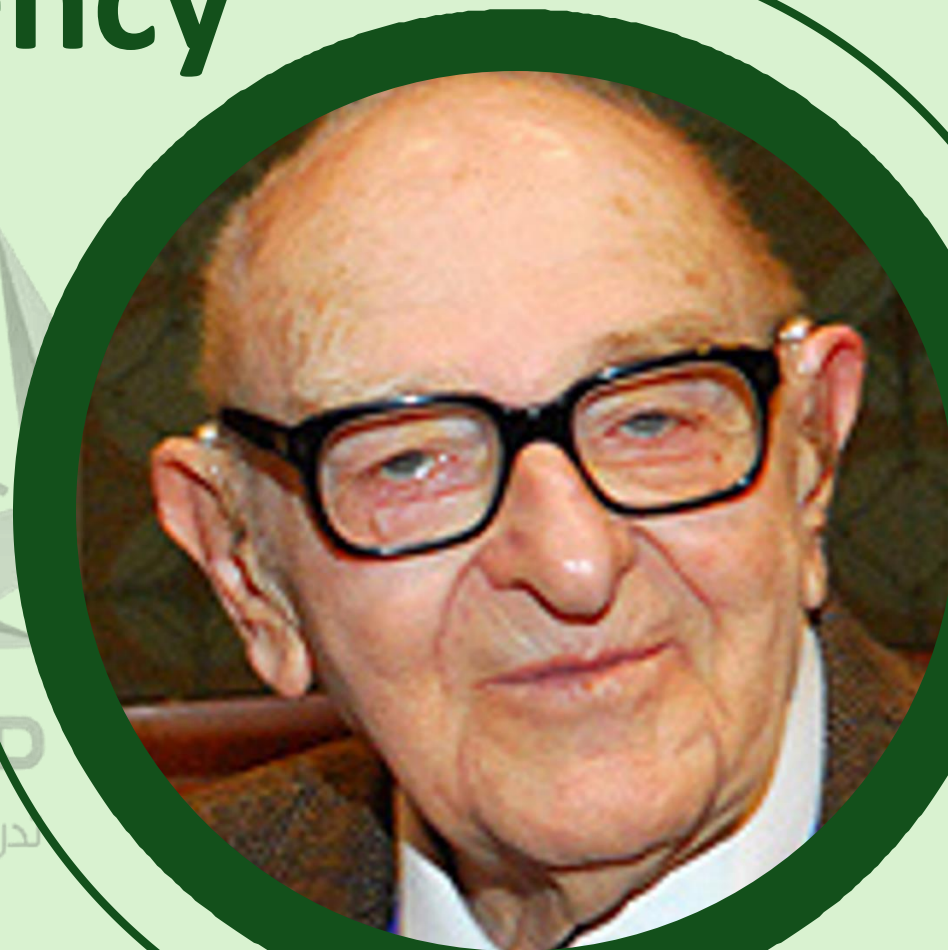


## Behavioral Leadership Theories (Blake-Mouton Managerial Grid )

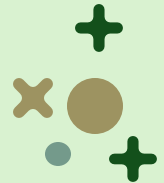


# Fiedler's Contingency Theory:

- 1-Position power
- 2- Leader-member relations
- 3- Task structure



# 3- Lead, Inspire, Influence and Manage the FM Organization



# FM's Strategic Partner Role

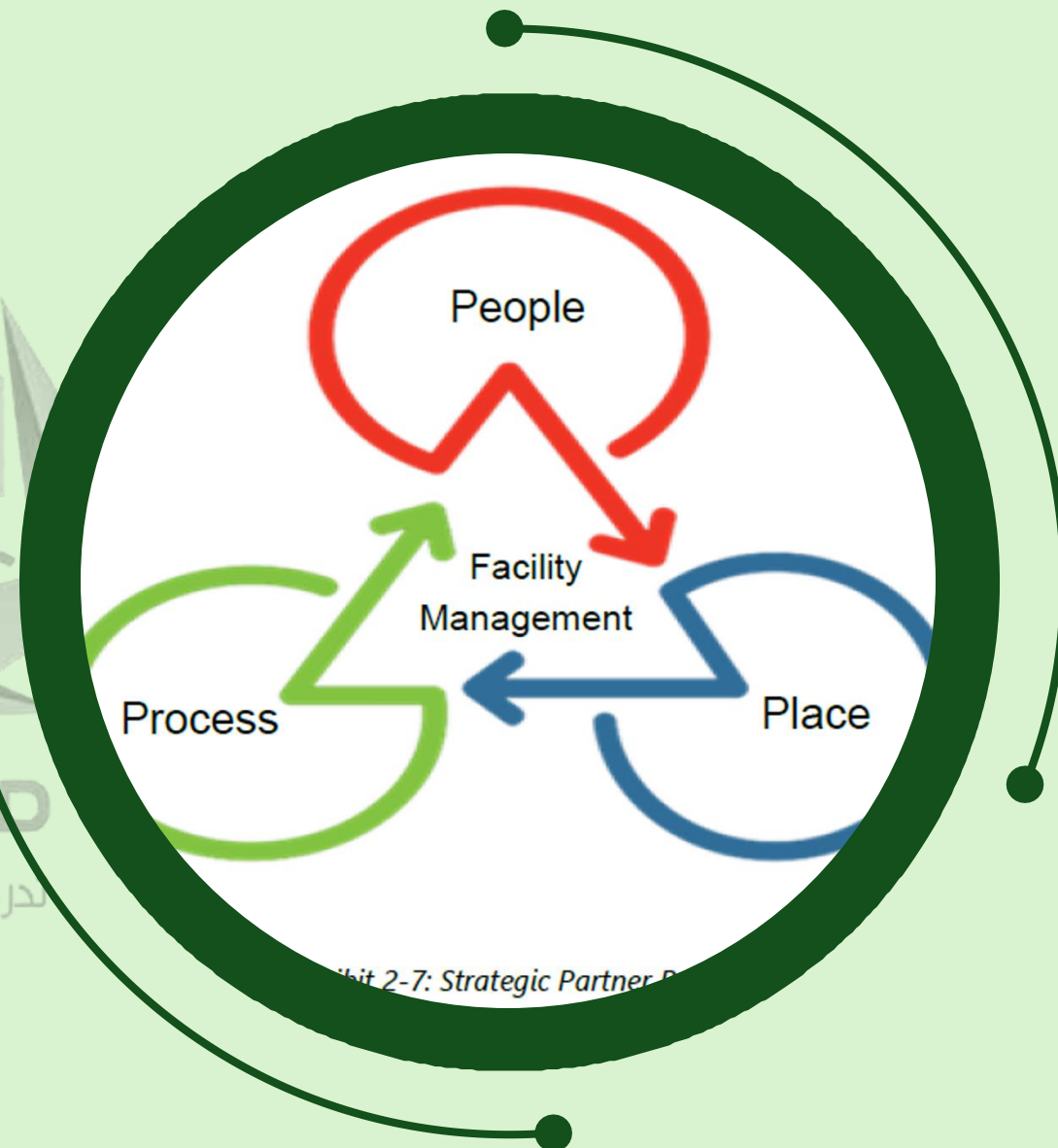


Figure 2-7: Strategic Partner Role

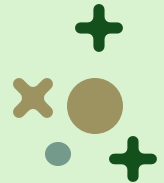


# Leadership Roles of FM:

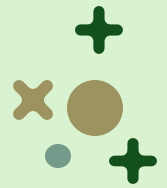
- 1- Providing Guidance
- 2- Influencing Decisions and Attitudes
- 3- Conducting Organizational Development (OD)

# FM Organization's Goals

- 1- Best Practices
- 2-Continual Improvement
- 3- Change Management



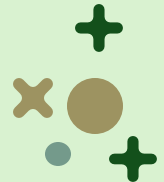
## 4-Advocate for Facility Management Needs and Priorities





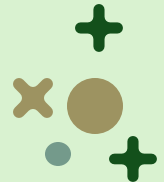
# Communication Planning:

- The plan
- The steps involved
- How success measured



# Marketing for FM

- Internal Promotion
- External Promotion
- Public Promotion

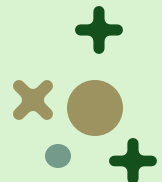


# Marketing Techniques

- Hooks
- Brevity and Conciseness
- Visual Elements
- Addressing Audience Pain

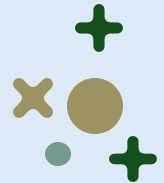


مرافق  
تدريب واستشارات



# Chapter 3

## Manage the FM Organization

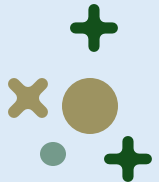


# Content

1- Effective Teams

2- Maintain Performance

3- Organize & Staff



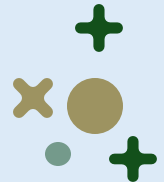


# Content

4- FM Policies

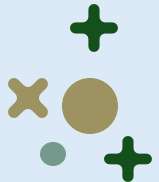
5-Responsibilities and  
Accountabilities

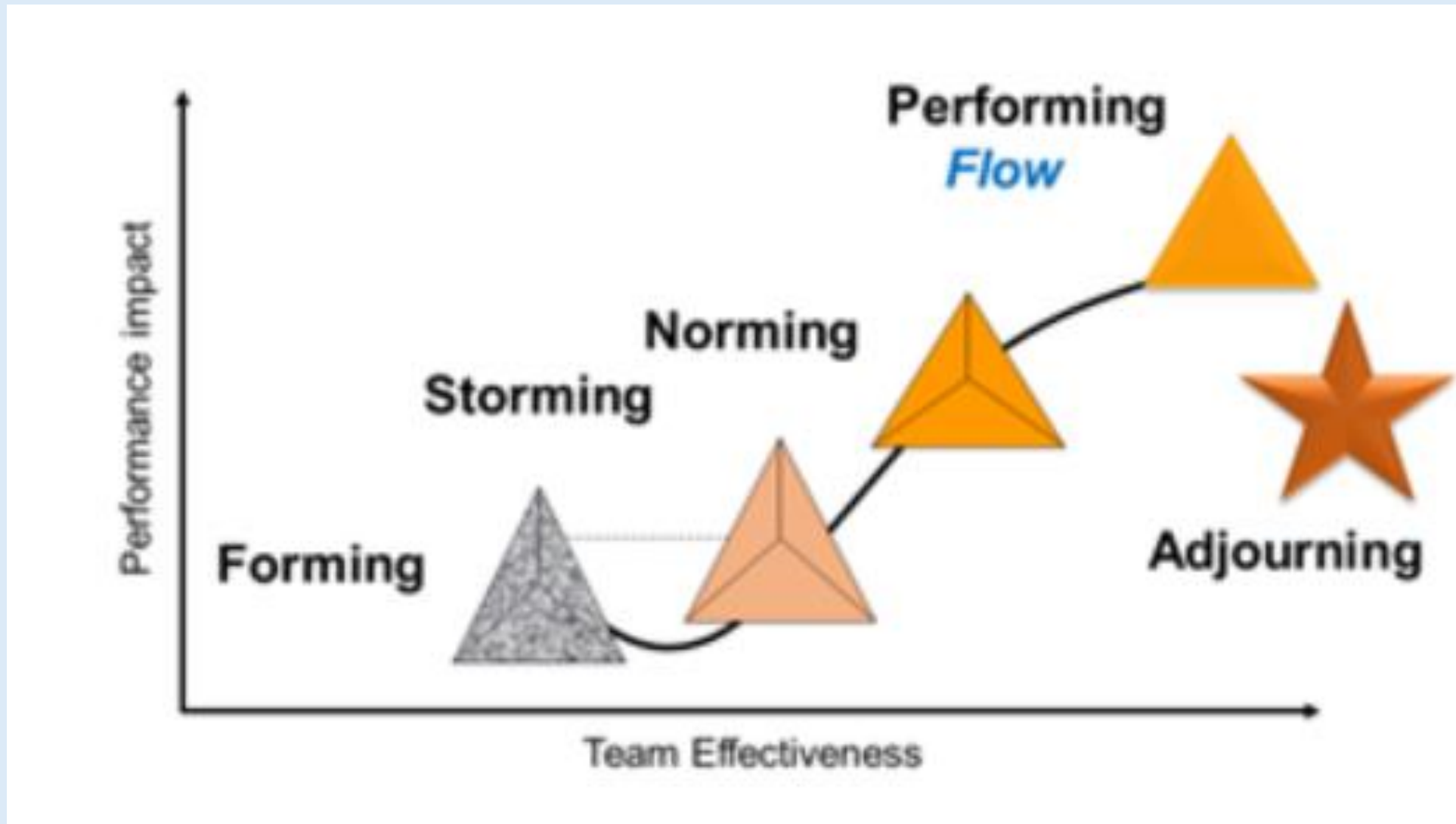
6- Resolve Conflicts



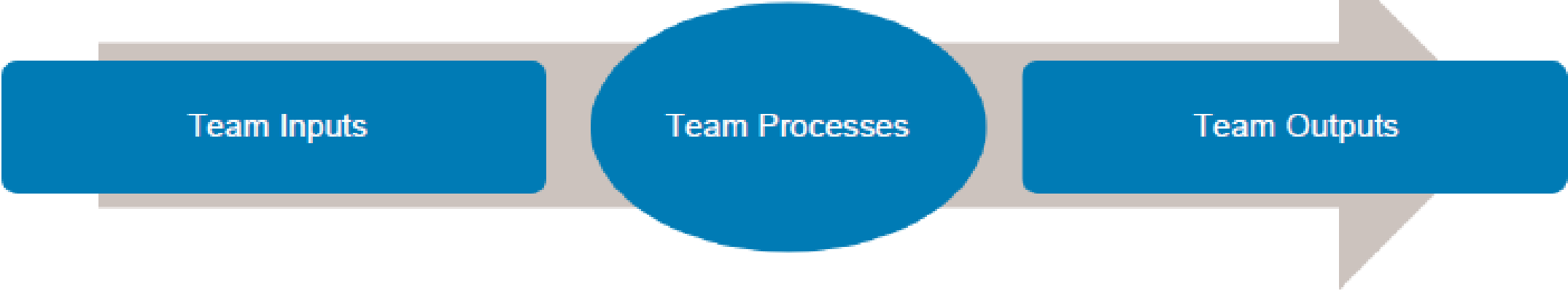


# 1- Develop Effective Teams





**Tuckman's Team Life-Cycle Model:**

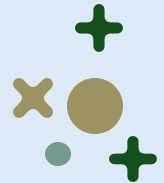
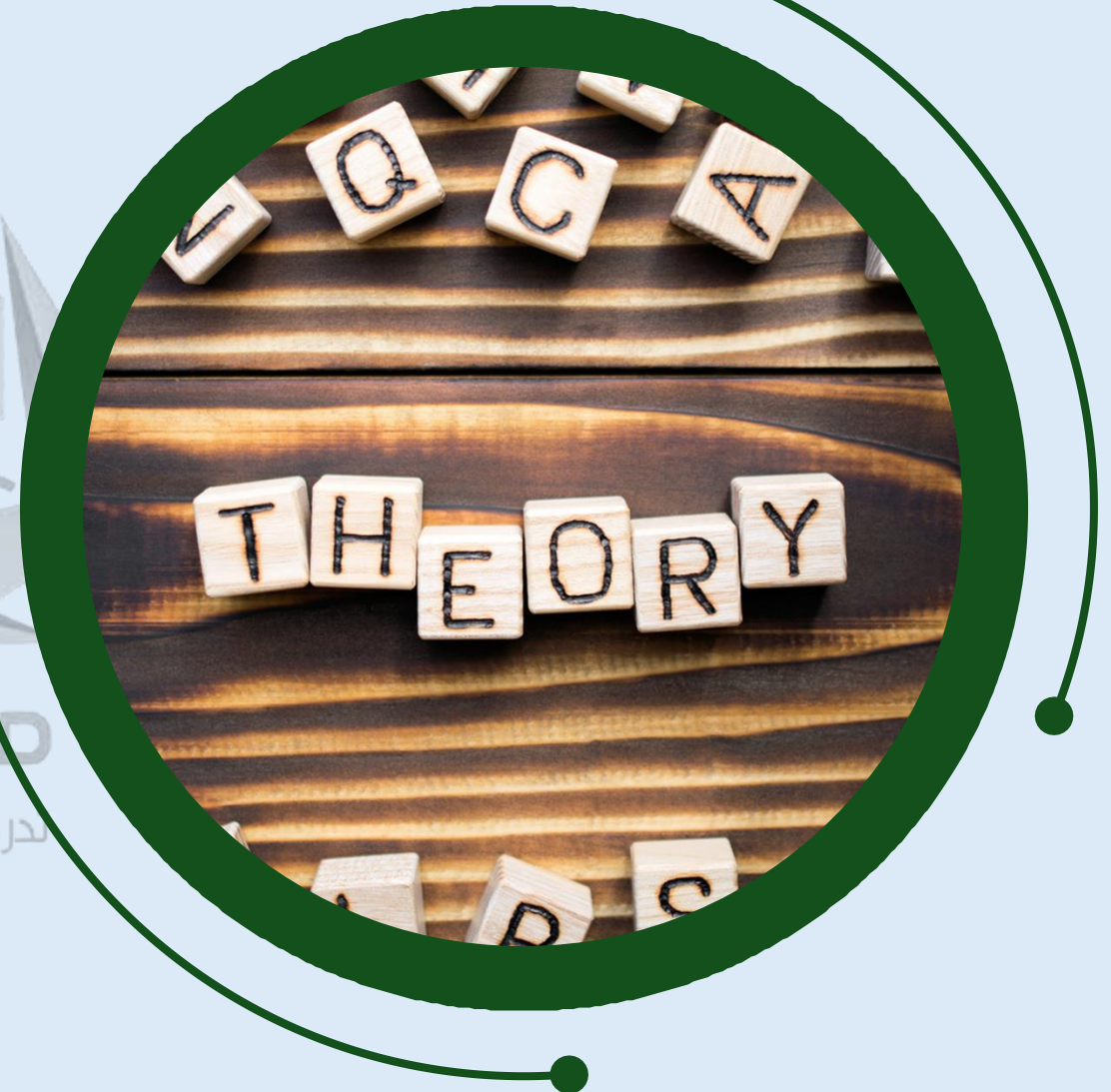


*Exhibit 3-2*

تدریب واستشارات

# Team Behavior Theories

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تدريب واستشارات





# Belbin Team Role Inventory

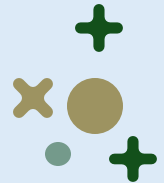


# Task, Maintenance and Self-Interest Roles:

1-Task Roles

2-Maintenance Roles

3-Self-Interest Roles

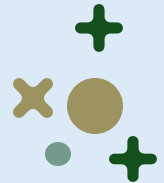




# Motivating Teams

Intrinsic Team Rewards

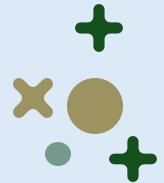
Extrinsic Team Rewards



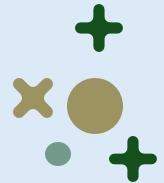
## 2-Maintain Team Performance



مرافق  
تدريب واستشارات



# Leading and Managing Performance



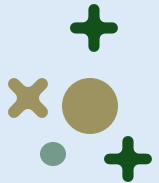


**Employee Knowledge, Skills, and Abilities (KSAs)**

## 3- Organize and Staff the FM Function



مرافق  
تدريب واستشارات



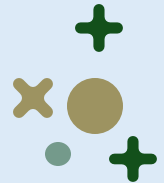


# Organizational Design and Structure

Organizational Design

Organizational Structure

Function



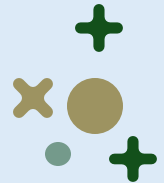


# Assess organizational structure's

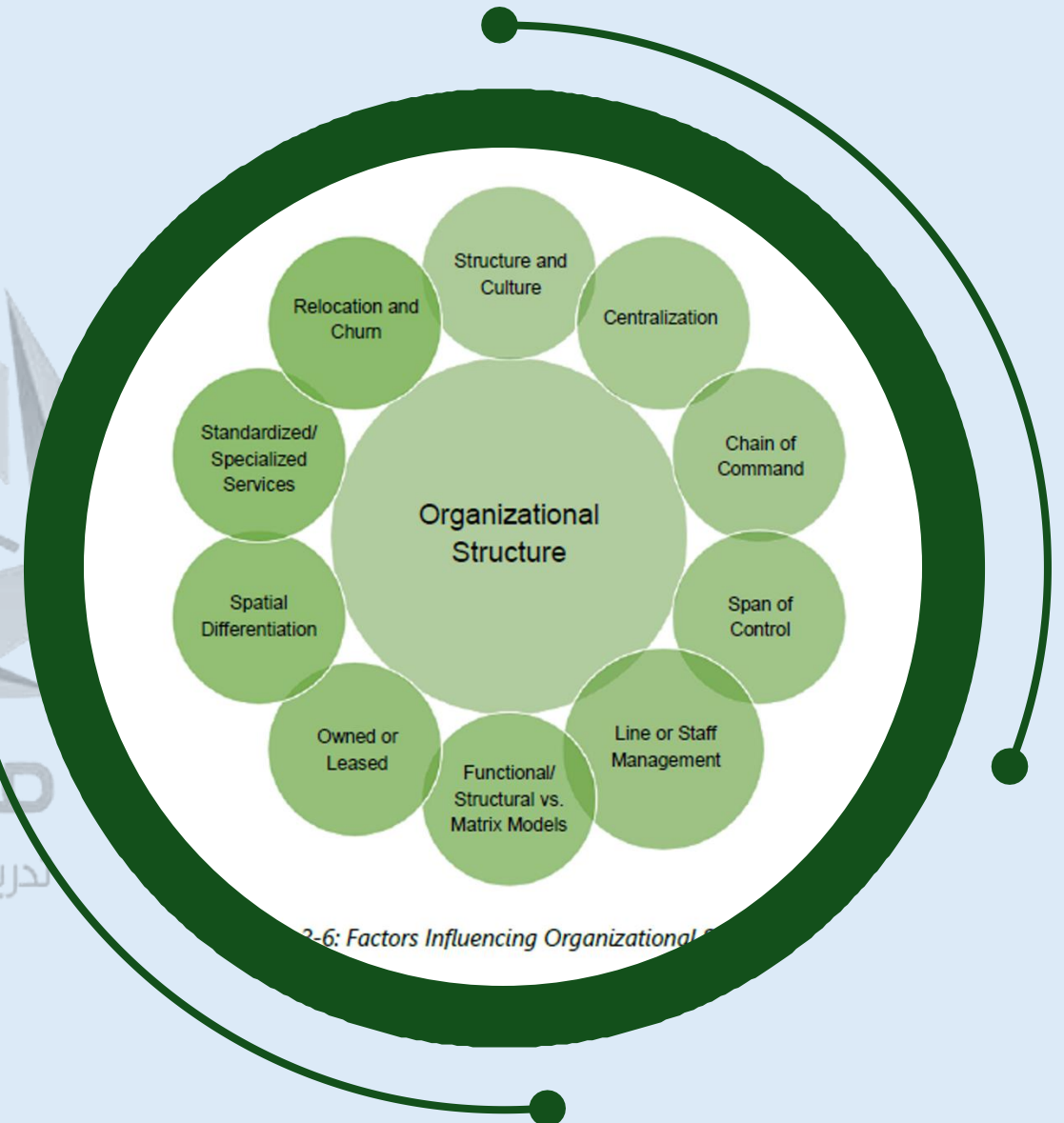
Re-engineer

Refine

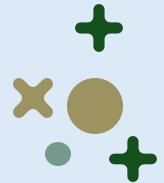
Mitigate



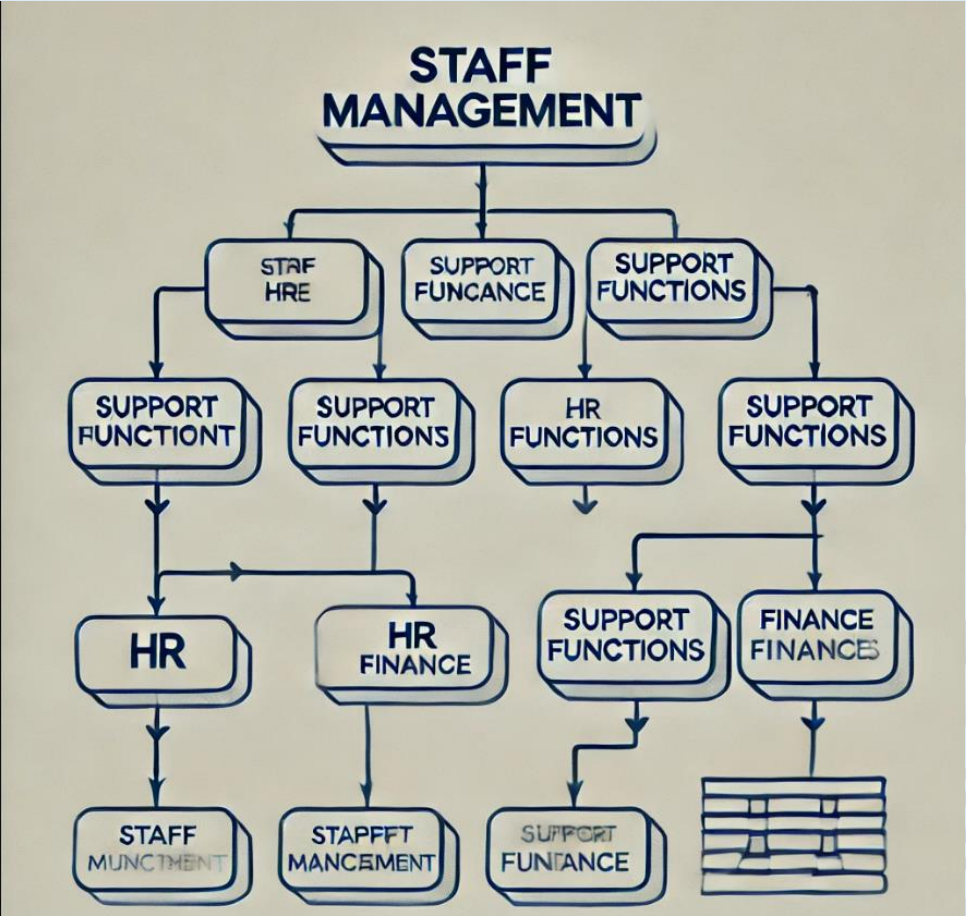
# Factors Influencing Organizational Structure



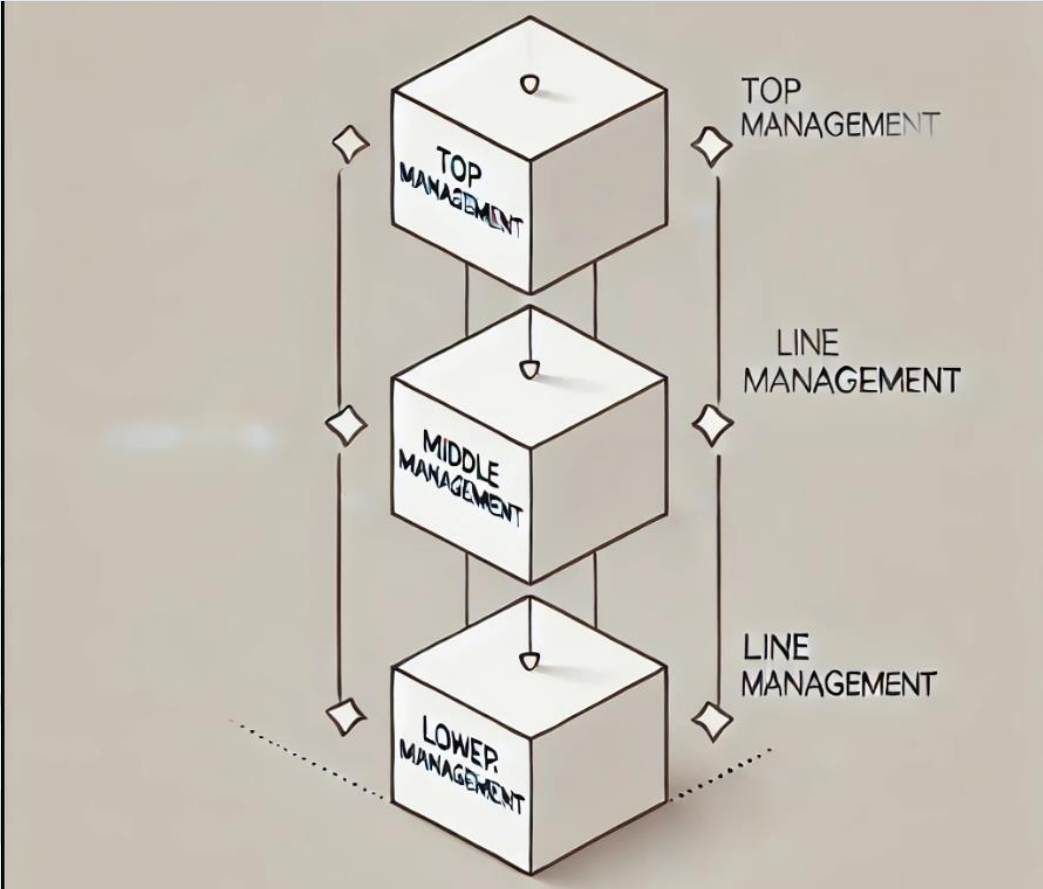
2-6: Factors Influencing Organizational Structure



3- Organize and Staff the FM Function

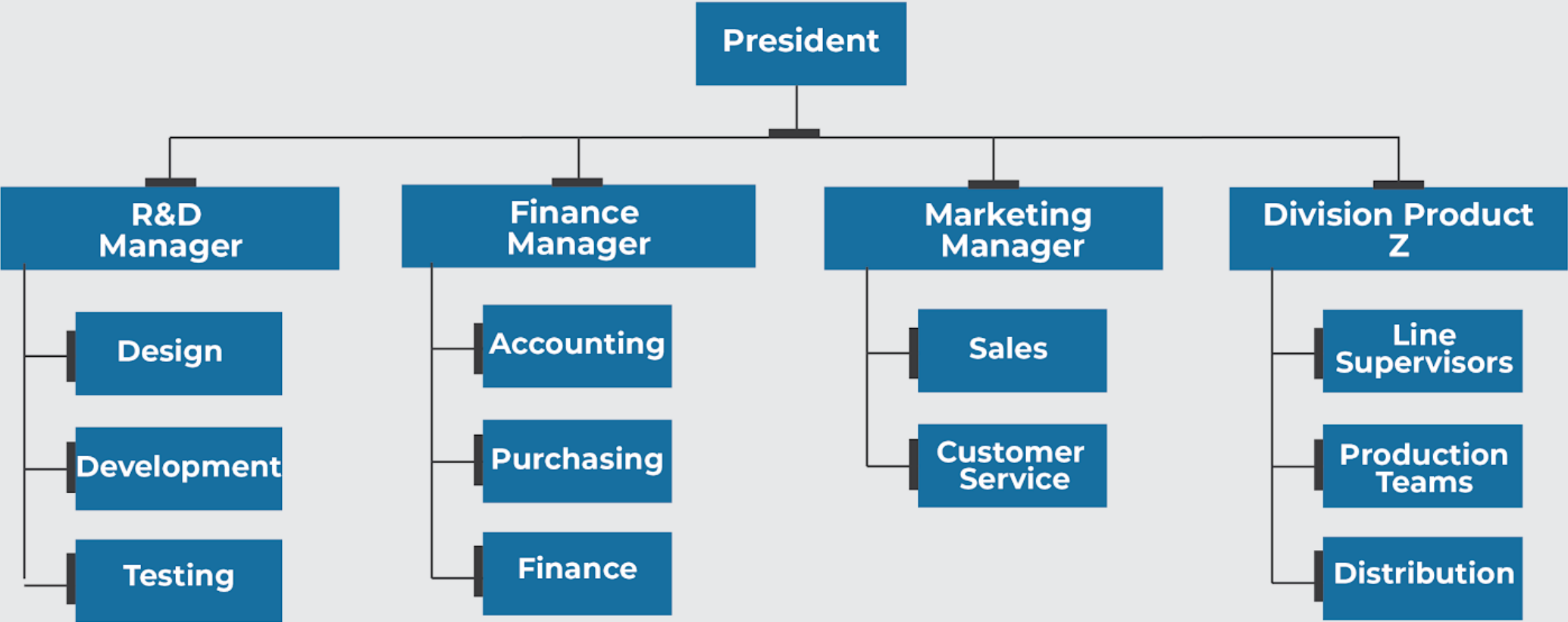


Line Management

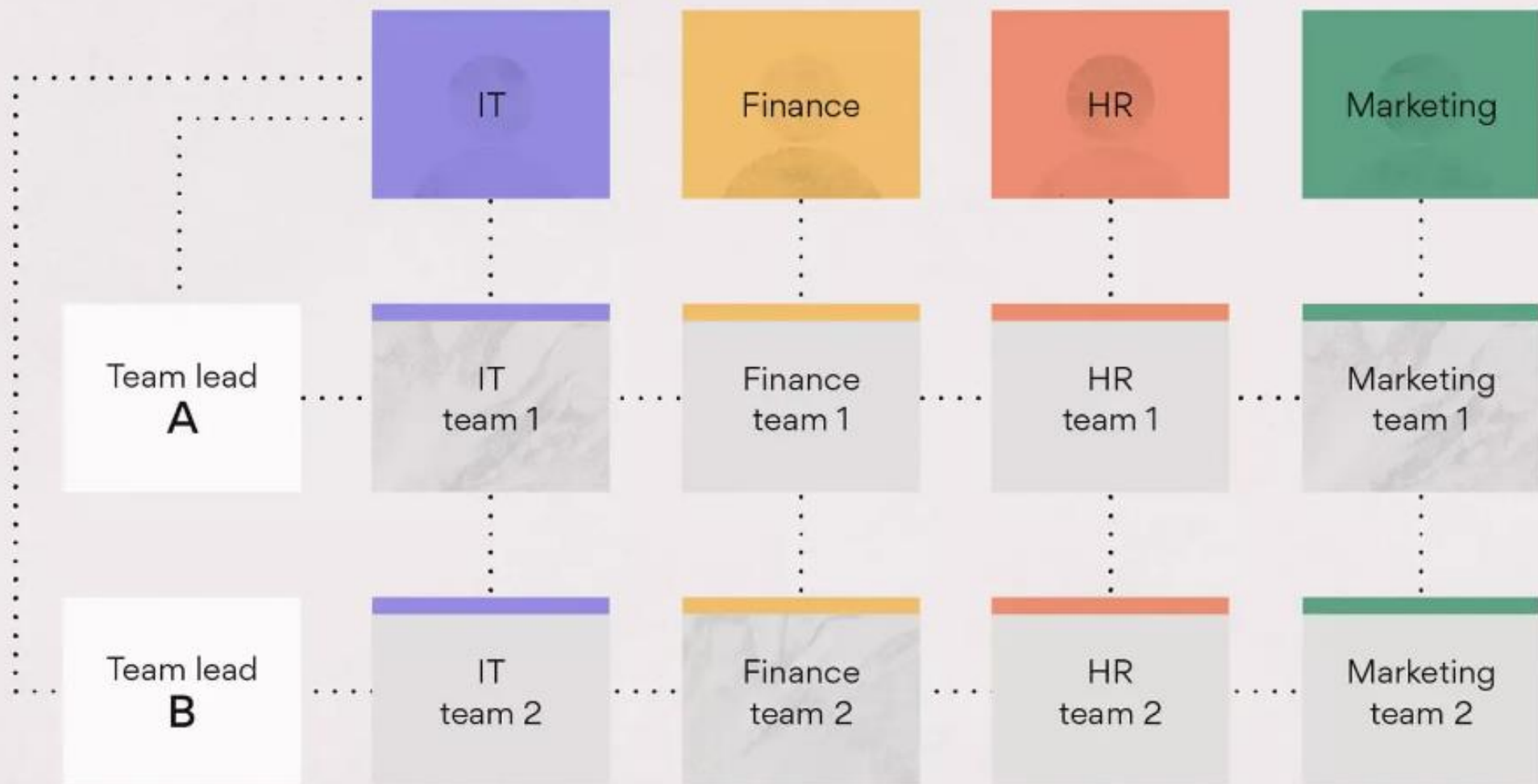


Staff Management

# Functional Organization



# Matrix reporting structure

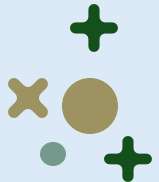




# 4- FM Policies, Procedures and Practices



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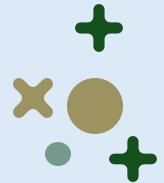




# Evaluation and Change Process



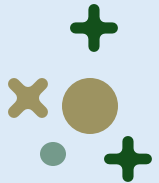
مرافق  
تدريب واستشارات



## 5-Clarify and Communicate Responsibilities and Accountabilities



مرافق  
تدريب واستشارات





## 5-Clarify and Communicate Responsibilities and Accountabilities

### **OFFICE MANAGER Job Description**

Cleveland County CASA, Inc.  
Norman, Oklahoma

#### QUALIFICATIONS

1. Minimum of two years college.
2. Minimum of three years secretarial work experience.
3. Typing ability (word processor/computer skills).
4. Ability to interact positively with the public, volunteers, board members, court and state personnel.
5. Ability to maintain statistical program data, files and record systems, financial records

#### SUPERVISION

The Office Manager shall be directly responsible to the Executive Director of Cleveland County CASA, Inc.

#### DUTIES

##### A. General Duties

1. Responsible for all general clerical duties.
2. Answer and screen all phone calls.
3. Purchase office supplies as directed and within budget guidelines.
4. Participate in bimonthly staff meetings.
5. Supervise volunteers who assist in the office
6. Maintain current mailing lists on active CASA volunteers, Board members, donors, and other pertinent lists.
7. Other duties as assigned by the Executive Director.

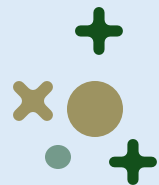
##### B. Volunteer Duties

1. Disseminate program information to any person making an inquiry.
2. Receive applications, mail reference forms, initiate background checks and set up volunteer files. Monitor screening process.
3. Assist with volunteer training and in-services; mails notices of meetings to all volunteers.
4. Responsible for procuring necessary paperwork to assign, rescind or close cases.
5. Schedules court observation for new CASAs and notifies appropriate court personnel.
6. Responsible for tracking court dates and notifying volunteer and staff.
7. Assists volunteers with necessary correspondence and Court Reports; distributes Court Reports to appropriate court personnel and professionals.
8. Consults with volunteers in absence of the Volunteer Coordinator and as appropriate.
9. Maintains volunteer files; records training and in-service attendance; documents volunteer hours.
10. Maintains CASA case files.



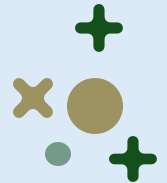


## 6- Resolve Conflicts

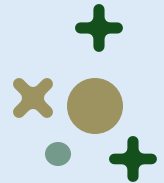




# Discovering Conflicts



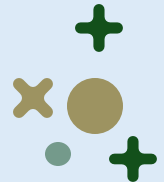
# Finding Root Causes of Conflicts



# Negotiation Techniques:

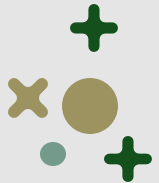
1- Soft Negotiations

2- Hard Negotiations



# Chapter 4

## Influence the Demand Organization



# Content:

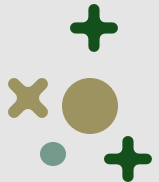
1-Code of Conduct

2-Relationships

3-Compliance



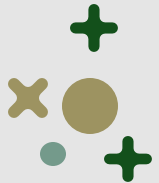
مرافق  
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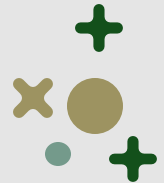
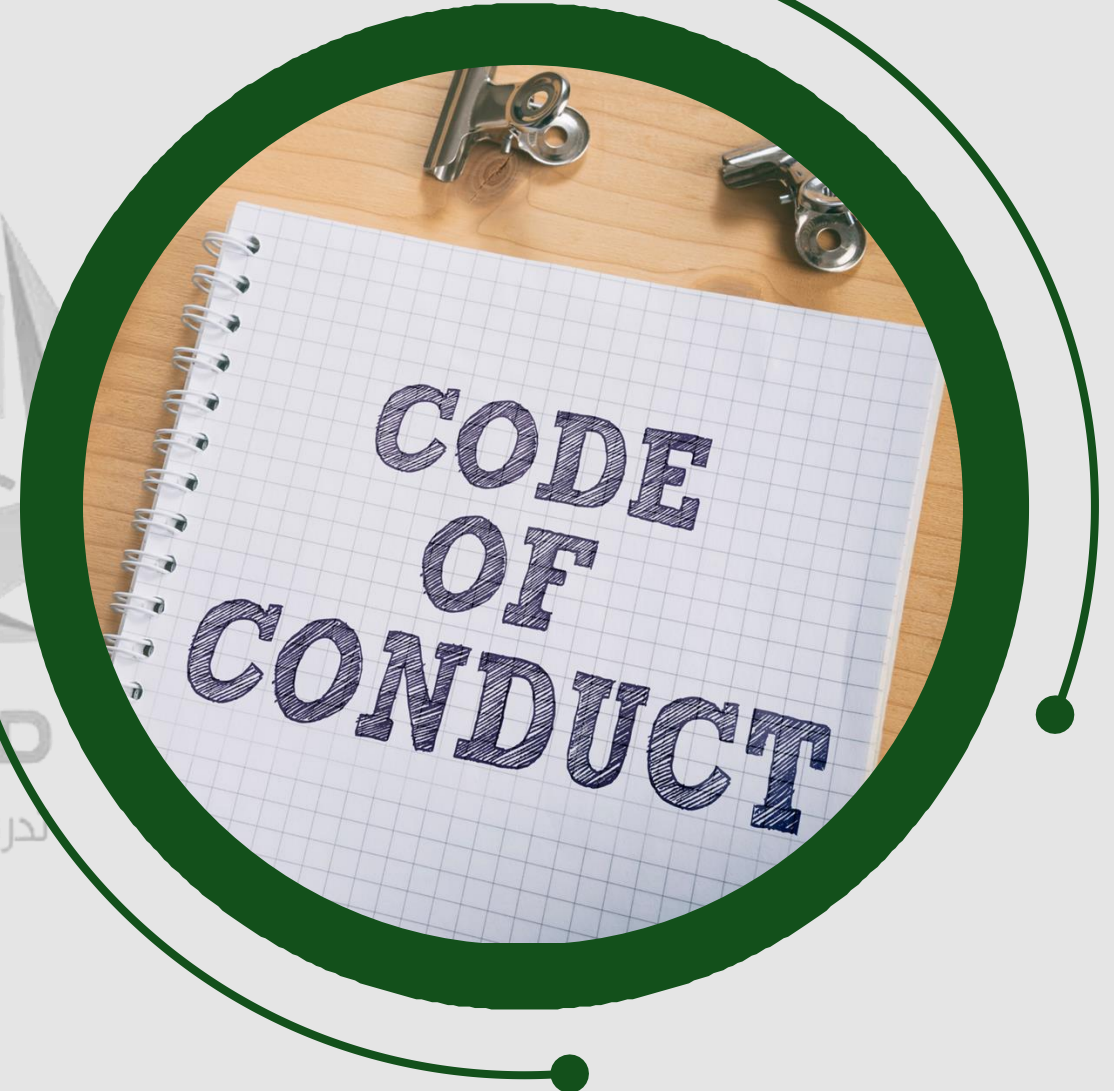
# 1-Promote, Encourage and Adhere to a Code of Conduct

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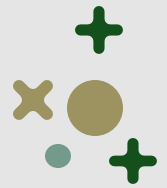


# Enforcement of codes of conduct

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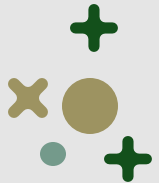
# Ethical Leadership



## 2- Develop and Manage/Oversee Relationships



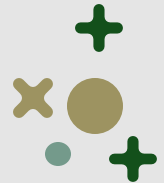
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# Stakeholders

- 1- Customers
- 2- Internal stakeholders
- 3- Suppliers and partners
- 4- Indirect stakeholders

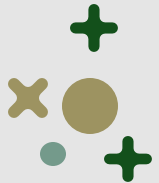




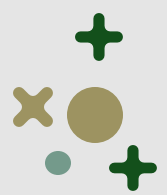
# 3- Understand and Manage Compliance



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# Cost of Noncompliance



# 4-Corporate Social Responsibility CSR

