



KLR Consulting

Inspiring Success in Your Leaders and Teams

First5 San Mateo Success Story

First 5 San Mateo is a public agency that stands as a voice and advocate for children under the age of five in San Mateo County. “Our mission is to provide funding and leadership in the community to ensure children have a good start in life: physically, socially, and emotionally; and live in an environment that promotes learning for their success in school and life,” explains Debby Armstrong, First 5 Executive Director.

Making Staff Development a Priority

Armstrong brings this same philosophy to the workplace, which is why she made staff development a priority when she was promoted. She also wanted to ensure her team could navigate through the myriad of changes that hit them all at once. “About two years ago, we were going through a transition in leadership when the former Executive Director relocated and I became Interim Executive Director. We had some challenges with open positions and needed to clarify roles and responsibilities to reduce overlap in duties and eliminate confusion around ownership of different projects,” explains Armstrong.

Before filling staff and management vacancies, Armstrong started an internal staff development initiative. “It became a start and stop process. Every time we became busy, the project seemed to fall to the wayside,” says Armstrong. After a couple of months, she realized First 5 needed an outside expert that would focus solely on the staff development initiative and bring it to successful completion.

Leveraging KLR Expertise

Then, she met Kristi Royse, CEO of KLR Consulting, and began a conversation and a strategic partnership that continues today. “Kristi got it, right off the bat. She understood how much I cared about the organization’s mission and my objective of developing the employees in order to make this vision a reality. My goal was to have a balanced, cohesive team with clear roles & responsibilities,” explains Armstrong. After speaking to some colleagues who gave KLR Consulting sterling recommendations; I decided to bring them in to help with executive coaching, change management and staff development. Of course, that was the first of many assignments.”

First5 San Mateo

Industry: Public Agency

Challenges:

- Undefined roles and responsibilities
- Confusing business processes
- Inefficiencies due to staff turnovers and new hires

KLR Solutions:

- Executive coaching
- Quarterly retreats
- Leadership and employee development program
- Change management and business process strategies
- Conflict resolution and communication workshops

Benefits of KLR Programs:

- Efficient/confident executive team
- Clearly defined roles and responsibilities
- Productive staff and improved business processes

Establishing Goals and Assessing Staff Skills

KLR began the engagement by prioritizing the agency's goals and challenges with Armstrong, then the staff was given a DISC assessment to explore their strengths and weaknesses. This was the first step in recognizing where the team was aligned and identifying the gaps that might prevent the agency from meeting its goals. The second step was confidential meetings between KLR and each staff member to discuss their individual assets and areas needing improvement.

KLR then coordinated an offsite for the entire staff where they worked on the issues brought out in the assessments in a group environment. "The retreat environment worked well because no one was singled out. We worked through the issues and outlined the solutions as a team with a thoughtful, nurturing facilitator. We were really challenged at the retreat; however everyone handled it superbly and started to understand what they could achieve with a little more cohesion in our work and better definition of roles. The interactive methods used by KLR at the retreat made it possible for our team to accomplish a great deal in a short amount of time," observed Armstrong.

Program Follow-up and Reinforcement

The progress made at the retreat was reinforced back at the office with confidential coaching sessions for staff members. KLR conducted follow-up sessions to ensure that the lessons learned at the retreat were integrated correctly into the staff's work and personal life.

"I've seen transformation in everyone," Armstrong comments. "The retreat went so well, that I have brought KLR Consulting back several times and I plan to continue to use them as a resource for our staff development and training needs." Since their initial engagement, KLR Consulting has helped First 5 with executive coaching for management, communication and conflict resolution workshops for the staff, and quarterly staff retreats for continued reinforcement of the best practices learned. "I even use KLR as a resource during the interview process for hiring," adds Armstrong.

Armstrong and First 5 have realized extraordinary changes since working with KLR. Armstrong reports that the executive team is completely staffed and more confident in their leadership roles. "We are united and working toward the same goals now, says Armstrong. "It's fun to come to work every day and I know that things will be handled in the office when I have to travel."

The First 5 team is more productive due to their work with KLR Consulting. "People are no longer working in silos. Our staff enjoys a work environment based on trust where positions are more integrated and the business runs smoothly," says a grateful Armstrong.

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