

## Suggested Action Steps for New Head Start Directors

ACTION	DOCUMENTS TO REVIEW	BENEFITS
1. Familiarize yourself with the organizational structure of the program at all levels – grantee and delegate	<ul style="list-style-type: none"> <li>➤ Grantee Agency Organizational Chart</li> <li>➤ Delegate Agency Organizational Chart</li> <li>➤ Head Start/Early Head Start Program</li> </ul>	<ul style="list-style-type: none"> <li>➤ Learn the current structure of the organization</li> <li>➤ Learn the direct/indirect lines of supervision/authority of the organization</li> </ul>
2. Meet with EHS/HS Management and Support Staff	<ul style="list-style-type: none"> <li>➤ Staff Roster</li> </ul>	<ul style="list-style-type: none"> <li>➤ Introduce yourself and get to know your team</li> <li>➤ Express your expectations of the team and of the program</li> </ul>
3. Meet with Grantee and Delegate staff	<ul style="list-style-type: none"> <li>➤ Staff Roster</li> </ul>	<ul style="list-style-type: none"> <li>➤ Become familiar with the Executive Director and other staff members you will be working with</li> </ul>
4. Meet with Grantee Board and Policy Council members	<ul style="list-style-type: none"> <li>➤ List of Board members</li> <li>➤ List of current Policy Council members</li> </ul>	<ul style="list-style-type: none"> <li>➤ Introduce yourself</li> <li>➤ Ask about their goals/expectations for the program</li> <li>➤ Talk about your goals/expectations for the program</li> </ul>
5. Tour the Head Start centers	<ul style="list-style-type: none"> <li>➤ Maps/addresses of the centers</li> <li>➤ Contact person for each of the facilities</li> </ul>	<ul style="list-style-type: none"> <li>➤ The visit will show you what is currently available and how the program is being implemented</li> </ul>
6. Learn requirements for maintenance, licensing of the facilities	<ul style="list-style-type: none"> <li>➤ Local, state or tribal requirements for facility licensing (if applicable)</li> <li>➤ Any contracts for maintenance, etc.</li> </ul>	<ul style="list-style-type: none"> <li>➤ Familiarization of these requirements and contracts is necessary to remain current</li> </ul>

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7. Determine where the program is in the refunding process (grant application cycle)	<ul style="list-style-type: none"> <li>➤ The last 5 year grant application and the last 4 years of Continuation Grant Applications</li> <li>➤ The last 3 years of Community Assessment information</li> </ul>	
8. Review the last annual self-assessment and improvement plan	<ul style="list-style-type: none"> <li>➤ Most current Program Self-Assessment and actions for improvement based on results</li> </ul>	<ul style="list-style-type: none"> <li>➤ The Self assessment is required to be conducted annually and the results are utilized to determine the programs areas of strength and need</li> <li>➤ The results and improvement plan need to be submitted for Board approval and OHS</li> </ul>
9. Review the last OHSMS report (latest Federal monitoring report)	<ul style="list-style-type: none"> <li>➤ Last OHSMS monitoring report</li> <li>➤ Agency corrective action plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ A review of this report will provide you with a summary of the agency status from the perspective of the Federal review team</li> </ul>
10. Review the last CLASS report completed with the latest Federal monitoring review	<ul style="list-style-type: none"> <li>➤ Scores in the three CLASS domains: Emotional Support, Classroom Organization, and Instructional Support</li> </ul>	<ul style="list-style-type: none"> <li>➤ The CLASS scores from OHS monitoring reviews will be used as one of the criteria for Designation Renewal (Refer to 1304.16)</li> </ul>
11. Review budget and financial information	<ul style="list-style-type: none"> <li>➤ Current budget</li> <li>➤ Current year to date financial statements</li> <li>➤ Written policies</li> </ul>	<ul style="list-style-type: none"> <li>➤ This review will give you an overall picture of the current financial status of the program</li> </ul>
12. Meet with the agency fiscal officer and determine fiscal reporting procedures and responsibilities	<ul style="list-style-type: none"> <li>➤ Current budget</li> <li>➤ Current year-to-date financial statements</li> </ul>	<ul style="list-style-type: none"> <li>➤ Establish relationship with the fiscal officer</li> <li>➤ Ensures that both of you are operating from the same point</li> </ul>

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13. Review agency reports/manuals	<ul style="list-style-type: none"> <li>➤ Program Policies and Procedures</li> <li>➤ Agency Policies and Procedures</li> <li>➤ Additional reports/manuals</li> </ul>	<ul style="list-style-type: none"> <li>➤ Familiarize yourself with existing agency policies and procedures</li> <li>➤ Learn about how the program is currently operating</li> </ul>
14. Review job descriptions of EHS/HS personnel	<ul style="list-style-type: none"> <li>➤ Job Descriptions of each position within the program</li> <li>➤ Head Start Performance Standards</li> </ul>	<ul style="list-style-type: none"> <li>➤ Learn what the current expectations are for each position</li> <li>➤ Ensure the descriptions include the requirements of the Performance Standards</li> </ul>
15. Determine the reporting requirements of the HS/EHS Director. Identify reports by name, describe contents of each, the time of month due, and to whom each report is submitted	<ul style="list-style-type: none"> <li>➤ Reports from previous Director</li> </ul>	<ul style="list-style-type: none"> <li>➤ Reports will be completed and submitted within correct timeframe.</li> </ul>
16. Identify various meetings that occur regularly where the HS/EHS Director is required to attend	<ul style="list-style-type: none"> <li>➤ Reports from previous Director</li> <li>➤ Reports from Executive Director</li> </ul>	<ul style="list-style-type: none"> <li>➤ Identification of these meetings will help you plan your schedule and maintain involvement in various groups to benefit the HS/EHS program</li> </ul>
17. Review salary structure, schedule of pay periods, and personnel benefits	<ul style="list-style-type: none"> <li>➤ Salary schedule</li> <li>➤ Pay period scheduled</li> <li>➤ Policies/procedures related to salary/benefits/etc.</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with what is currently implemented within the program</li> <li>➤ To identify entry rates and salary/wage increase requirements</li> <li>➤ To identify employee benefits</li> <li>➤ To identify agency personnel procedures for hiring/termination</li> <li>➤ To identify Policy Council involvement in</li> </ul>

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		personnel practices
18. Review most recent TTA Plan	<ul style="list-style-type: none"> <li>➤ Review TTA plan for:</li> <li>➤ issues of noncompliance</li> <li>➤ Required training</li> <li>➤ Self-assessment improvement plan</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with plans to address noncompliance areas</li> <li>➤ To identify areas to sustain compliance</li> <li>➤ To identify areas for capacity building and professional development</li> </ul>
19. Review leave policy and identify holidays recognized for staff and children	<ul style="list-style-type: none"> <li>➤ Personnel policies</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with current agency practices</li> <li>➤ To identify calendar/scheduling dates</li> </ul>
20. Review the personnel evaluation system	<ul style="list-style-type: none"> <li>➤ Agency personnel policies and procedures</li> <li>➤ Fair Labor Standards Act</li> <li>➤ Agency forms for personnel evaluation</li> <li>➤ Professional Development Plans</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with the existing personnel evaluation system</li> <li>➤ To identify schedule of personnel evaluations</li> </ul>
21. Review clerical procedures and secretarial services available to the HS/EHS Director and Managers (if applicable)	<ul style="list-style-type: none"> <li>➤ Copy of agency clerical procedures</li> <li>➤ Copy of clerical/secretarial position descriptions</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with current operations</li> <li>➤ To identify changes you want to make within the program</li> </ul>
22. Review continuing education opportunities for the HS/EHS teachers, HS assistant teachers and other HS/EHS staff – especially pertaining to the CDA/AA/BA mandate	<ul style="list-style-type: none"> <li>➤ Agency personnel policies</li> <li>➤ Agency staff development policies</li> <li>➤ Head Start Performance Standards</li> <li>➤ Head Start Act</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with existing practices</li> <li>➤ To begin planning for the T/TA plan</li> </ul>
23. Determine the status of special Head Start Initiatives (i.e., AA/BA mandate, enrollment of	<ul style="list-style-type: none"> <li>➤ Regional/National issuances/instructions</li> </ul>	<ul style="list-style-type: none"> <li>➤ To become familiar with current expectations from the Regional Office and Office of Head Start</li> </ul>

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children with disabilities, Enrollment, Child Care Partnerships, Child Outcomes, Fatherhood, etc.)		<ul style="list-style-type: none"> <li>➤ To be able to assess the status of the agency regarding special initiatives</li> </ul>
24. Receive update on any personnel actions pending or unfinished that need the attention of the Director	<ul style="list-style-type: none"> <li>➤ Reports from previous Director</li> </ul>	<ul style="list-style-type: none"> <li>➤ Discussion with the Agency Executive Director will assist in providing the next steps for the new HS/EHS Director</li> </ul>
25. Review any pending or current class action suits, or other legal claims against or by the grantee/Delegate Agency that may affect the operation of the Head Start/Early Head Start program	<ul style="list-style-type: none"> <li>➤ Review with the Agency Executive Director</li> <li>➤ Appropriate files</li> </ul>	<ul style="list-style-type: none"> <li>➤ The HS/EHS Director needs to be aware of the status of any of these types of actions to know appropriate measures to take and when to contact the Regional Office and/or legal counsel</li> </ul>