Five Steps to Building Operational Excellence
Session 2 of 2
Introductions

Breanna

Kim
EdOps Services Overview

- Finance & Accounting
- Facilities Support
- Operations
- Strategic Consulting
- Student Data
- Human Resources
EdOps Clients Overview

~35,000 Students served
~$600MM Operating budget $ under management
$150MM+ Facility financing supported last 3 years
Who’s In the Room Today

American Dream Charter School
Brilla Veritas
Brooklyn Emerging Leaders Academy
Brooklyn RISE Charter School
Cardinal McCloskey
Central Queens Academy
Challenge Charter Schools
Coney Island Prep
Democracy Prep Public Schools

Evergreen Charter School
Harlem Hebrew Language Academy
Harlem Link Charter School
Hebrew Language Academy
Neighborhood Charter Schools
New Visions Charter High School
Rosalyn Yalow Charter School
Stradford Prep Charter School
Goals for These Sessions

“Operational excellence in support of student achievement”

- Share insights as to what constitutes operational excellence
- Provide best practice tools to build upon ops practices at your schools
- Utilize tools and best practices to create and implement improvements at your schools
- Assess the state of your schools’ current operational strengths and weaknesses
Recap: Five Domains of Operational Excellence

There are many factors which encourage well-run school operations. We believe there are five pillars to creating an effective operational environment.

- Increase accountability
- Reduce confusion
- Boost team cohesion and forward planning
- Prevent things “falling through the cracks”

Clear Roles & Responsibilities

- Increase consistency of deliverables
- Create roadmap for operational procedures
- Decrease new staff training burden

Standard Operating Procedures

- Improve team flexibility and overall performance
- Foster internal coverage of vacancies
- Build skills towards promotion

Cross-Training

- Replace “fire fighting” with forward planning
- Raise awareness of ops team contributions
- Develop cadence for updates and streamline information

Proactive Communication

- Promote staff engagement and professionalism
- Improve service level while providing growth opportunities
- Encourage staff ownership over advancement

Staff Development
Session 1 Recap: What Is Operational Excellence?

- Homework Share out
- The Importance of Cross-Training
- The Staff Development Cycle
- Increasing Proactive Communication
- Next Steps
What Is Operational Excellence?

Commitment to defined key processes and strategic decisions across schools

Routine communication and feedback loops

Maximize instructional time; ops processes run behind the scenes

Proactive and ahead of the game

Operations positions are exciting, competitive and rewarding; Less operations turnover

Shared understanding of expectations and goals, with clear accountability of objectives and appropriate resources, empowerment, training, processes and tools

Schools hum; systems run smoothly, avoiding unnecessary hiccups

Giving 100% during the work hours, but leaving work / not being consumed by it
<table>
<thead>
<tr>
<th>What Can Hold Us Back from Achieving Operational Excellence?</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Clear Roles &amp; Responsibilities</strong></td>
</tr>
<tr>
<td>Lack of time, or a lot of urgent (or seemingly urgent) requests</td>
</tr>
<tr>
<td><strong>Standard Operating Procedures</strong></td>
</tr>
<tr>
<td>Operations isn’t a priority for the organization</td>
</tr>
<tr>
<td><strong>Cross-Training</strong></td>
</tr>
<tr>
<td>High turnover in operations staff</td>
</tr>
<tr>
<td><strong>Proactive Communication</strong></td>
</tr>
<tr>
<td>Lack of joint planning or effective communication between academic and operations teams</td>
</tr>
<tr>
<td><strong>Staff Development</strong></td>
</tr>
<tr>
<td>We have something “that works,” and a lot of other problems to solve</td>
</tr>
<tr>
<td>Many exceptions to policies &amp; procedures</td>
</tr>
<tr>
<td>Jack of all trades, master of none mentality</td>
</tr>
<tr>
<td>Staff feeling that “it is not their job”</td>
</tr>
<tr>
<td>Lack of feedback or trust</td>
</tr>
<tr>
<td>Underdeveloped career pathways due to lack of clear directives or resources for PD</td>
</tr>
</tbody>
</table>
Our Perspective on Implementation / Building Ops Excellence

There is no silver bullet. Pursuing incremental improvement across the five core areas is more likely to lead to success.

Do not over-engineer. A simple, consistently implemented process aligned with the school’s size and needs is always better than a more complex one.

Take ground gradually, and keep it. It is best to go slow or take a measured approach, especially at first, to avoid re-work and staff frustration.

Explicitly identify dependencies. The sequence of implementation will depend on when certain steps are taken (e.g. cross-training can only begin once roles are defined).
Session 1 Recap: What Is Operational Excellence?

Homework Share out

The Importance of Cross-Training

The Staff Development Cycle

Increasing Proactive Communication

Next Steps
Do Now #1: Peer Review of SOP (one-pager handout)
Spend 10 minutes reading through your partner’s draft SOP (or one EdOps has provided), and use the accompanying handout to answer the questions below.

- What process was covered in the SOP?
- Which type of SOP was created (checklist, flowchart, swim lane)?
- Based on your reading, what is the purpose of the SOP?
- Who are the responsible parties? (RACI?)
- Are the steps laid out in a clear, easy to understand manner?
- Discounting any school-specific details, do you feel there is enough information where you could step-in and complete the task presented?
- How can this SOP be improved? What can be sharpened? Added? Clarified?
Session 1 Recap: What Is Operational Excellence?

Homework Share out

The Importance of Cross-Training

The Staff Development Cycle

Increasing Proactive Communication

Next Steps
## What Is Cross-Training?

<table>
<thead>
<tr>
<th>Correct</th>
<th>Incorrect</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Intentionally-selected, <strong>specific</strong> tasks and processes</td>
<td>• A <strong>duplication of all</strong> operational tasks and processes</td>
</tr>
<tr>
<td>• <strong>Select team member(s)</strong> equipped with enough knowledge to handle a task</td>
<td>• An expectation of “<strong>all hands on deck</strong>” with all staff trained to perform a task</td>
</tr>
<tr>
<td>• A clear owner of tasks is <strong>maintained</strong>; the backup is for a clear division of R&amp;R</td>
<td>• <strong>Primary responsibility</strong> over a process or task under normal circumstances</td>
</tr>
</tbody>
</table>
Why Is Cross-Training Important?

**Variable Support.** Provides extra support during peak seasons when person(s) typically responsible for tasks may be pulled in several directions.

**Vacancy/Transition Coverage.** Creates internal coverage of vacancies, allowing for increased flexibility and ability to cope with absences.

**Growth Opp/Internal Pipeline.** Fosters opportunities for growth within organization as staff learn and develop new skills; generates internal pipeline.

**Improves SOPs.** Examines strengths and weaknesses of SOPs, helping to determine what is well documented and where gaps may lie.
Which Processes Should You Prioritize?

- **Low-hanging Fruit.** Practices that are easy for others to learn, but only 1 or 2 staff members know how to do them.

- **Frequent, Critical Processes.** Practices that occur with relative frequency and are of high importance.

- **External Facing.** Practices that include an outward facing aspect (e.g. affect students, families or teachers).

- **Broken Processes.** Processes which are not working well to help improve process while engaging in cross-training.

**Do Now #2: Identify 2-3 Processes for Cross-Training.**

*Workbook, page 3*
### What Can Cross-Training Consist Of?

<table>
<thead>
<tr>
<th>Written SOP Exists</th>
<th>Written SOP Does Not Exist</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Simple Process</strong></td>
<td>• Set aside time during one-on-one meetings to teach the process.</td>
</tr>
<tr>
<td>• Have the trainee attempt to follow the process in the SOP.</td>
<td>• Have trainee take notes that can be turned into an SOP.</td>
</tr>
<tr>
<td>• Follow up on any areas of ambiguity or where further reinforcement may be needed. Revise the SOP as necessary.</td>
<td>• Have the trainee attempt to follow the process. Reinforce any areas as needed, revising SOP as you do so.</td>
</tr>
<tr>
<td><strong>Complicated Process</strong></td>
<td>• Have the trainee shadow the trainer and take notes on the process.</td>
</tr>
<tr>
<td>• Set aside time during one-on-one meetings to teach the process.</td>
<td>• Turn the notes into a draft SOP.</td>
</tr>
<tr>
<td>• Have the trainee attempt to follow the process.</td>
<td>• Review the SOP and the process during regular one-on-one meetings.</td>
</tr>
<tr>
<td>• Reinforce any areas as needed. Revise SOP as necessary.</td>
<td>• Have the trainee attempt to follow the process, and revise SOP &amp; reinforce any areas as needed.</td>
</tr>
<tr>
<td>• Consider splitting into multiple meetings if process is very complicated.</td>
<td></td>
</tr>
</tbody>
</table>

**Cross-training can help determine if existing SOPs are useful...**

...and can help create new SOPs for processes where they do not exist.
Considerations for Maintaining Clear Roles & Responsibilities

**WHO** should be cross-trained?

- Eager to grow
- In a similar role
- Has complementary primary responsibilities (different peak times)
- May eventually transition into a different role that has this task as a primary responsibility

**WHEN** should they perform this task?

- Specific to the task e.g.:
  - Only for long-term leave / vacation / vacancy
  - Any time primary staff member is out
  - During peak season
- Explicitly determine the timing of when the cross-trained staff member would step in as part of the cross-training process

**HOW** does this impact roles/RACI?

- If it’s clear when the cross-trainee would step into the role, there is no conflict with RACI
- The cross-trainee is being trained to be the “R” - but may already be an A, C or I (“in a similar role”)
- Significant cross responsibilities can be explicitly indicated in job description

R **Responsible**  
C **Consulted**  
A **Accountable**  
I **Informed**
Do Now #3: Develop the Critical Elements of a Cross Training Plan for a Key Process

Workbook, page 4
Discussion & Takeaways

Cross-training is NOT a “nice-to-have”. It is critically important to ensuring you don’t drop the ball on operational issues.

Positive externalities of cross training:

✓ **Improves quality of SOPs** through the input of multiple staff members
✓ **Develops staff** and aids in **succession planning**
✓ Allows trainer **opportunity to shine**, shows you trust them to teach how to do things well
✓ Offers **coaching / management responsibility** for those who aren’t managers

Pitfalls to avoid when cross training:

X Confusion around **roles & responsibilities**
X “We don’t have time for a complicated cross-training program” – **keep it simple**
X “We have so many processes to cross-train on” – make cross training **ongoing throughout year**, do not attempt to complete it all at once
5 minute break!
Session 1 Recap: What Is Operational Excellence?

Homework Share out

The Importance of Cross-Training

The Staff Development Cycle

Increasing Proactive Communication

Next Steps
4 out of 5 U.S. employees are not satisfied with their performance evaluation process according to a 2009 Reuters poll.

62% of 18-34 year-olds felt blindsided by their review, with nearly 60% saying it was unfair or inaccurate, according to a 2015 TriNet survey.

93% of employees would stay at a company longer if it invested in their careers according to LinkedIn’s 2018 Workforce Learning Report.
Is This Staff Development?
Integrated Performance Management & Development Cycle

A year-round process where supervisors and employees work together to set expectations, provide and receive feedback, and compare new expectations to original ones.

1. Goal Setting
2. Development Planning
3. Progress Checkpoints
4. Performance Evaluation
1. Underlying Considerations When Developing Goals

**Goal Determinants Pyramid**

- Individual Goals
- Ops Team Goals
- School Goals
- School Mission & Core Values

**Guidelines**

- Use a consistent format for all staff
- Limit the number of goals for each staff member
- Engage each staff member in a dialogue about goals
- Manager has final approval of goals
1. Using SMART Criteria to Develop Effective Goals

**SPECIFIC**
- Written simplistically & clearly defines what you’re going to do.

**MEASURABLE**
- Includes tangible evidence that you have accomplished the goal.

**ATTAINABLE**
- Possesses knowledge, skills and abilities needed to achieve the goal.

**RELEVANT**
- Aligns with overall operations staff, school and organization-wide goals.

**TIMELY**
- Bound by a timeframe that creates a practical sense of urgency.

---

**Example Goal**

John will learn how to use Microsoft Excel’s VLookup and Pivot Tables.

Using these skills, he will create a student lunch tracker by classroom.

He will build upon his current Excel skills by completing 4 training modules in Lynda.com and receiving coaching from the DOO.

Creating the tracker aligns with our broader school-wide goal of improving operational efficiencies.

One training module will be completed each month, with the final project due January 9.

Source: University of Virginia, “Writing S.M.A.R.T. Goals”
Do Now #4: Pick a member on your team or yourself and write 2-3 SMART goals.

Workbook, page 6
A individual development plan (IDP) is a **road map for achieving goals.** It outlines which skills need to be developed in order to achieve those goals.

- **Link development priorities to goals** for the year as much as possible
- **Keep the number of development areas fairly focused**
- **Include a comprehensive, explicit list of ways** skills will be developed:
  - Targeted internal trainings
  - External PD opportunities
  - Stretch assignments
  - New projects throughout the year that will develop skills
- **Identify the times** during which the manager and staff member will check in on the IDP in order to track progress and reassess priorities as needed
2. How Do Adults Develop Skills?

Research shows that adults learn best through a varied approach, with the majority of the learning coming from on the job experience.

70% On the Job
- Stretch assignments
  - e.g., New scope
  - e.g., Lateral moves

20% Mentoring & Coaching
- Development relationship with
  - e.g., Managers
  - e.g., Workplace coaches
  - e.g., Communities of practice

10% Coursework & Training
- Training
  - e.g., Classes
  - e.g., Virtual classroom
  - e.g., Articles and white papers

# 2. Development Plan 70/20/10 Sample

<table>
<thead>
<tr>
<th>Skills to Develop/ Growth Areas</th>
<th>On the Job Assignment</th>
<th>Mentoring &amp; Coaching</th>
<th>Coursework &amp; Training</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>What experiences will provide opportunity to learn this skill?</strong> 70%</td>
<td><strong>How will you get feedback and help?</strong> 20%</td>
<td><strong>What resources exist to train staff?</strong> 10%</td>
</tr>
</tbody>
</table>
| Example Skill A: Project Mgmt | • Opportunity to project manage a cross functional taskforce  
• Take over planning the monthly department meetings | • Ask for direct feedback for manager at specific points in taskforce lifecycle  
• Meet with experienced project manager on operations teams | • Complete e-module from Project Module Institute as an introduction |
| Skill B: Written Communication | | | |
| Skill C: Time Management | | | |

Source: Adapted from Bridgespan [https://www.bridgespan.org/insights/library/leadership-development/create-a-70-20-10-development-plan](https://www.bridgespan.org/insights/library/leadership-development/create-a-70-20-10-development-plan)
Do Now # 5: Pick one of the new SMART goals, and develop an outline of an IDP using 70/20/10.
Goal Setting

Development Planning

Performance Evaluation

Progress Checkpoints

1

2

3

4
Check-Ins Should Be...

- Regular: monthly or bi-monthly
- Brief: 30-45 minutes
- Documented: maintain check-in notes
- Dynamic: adjust goals & progress checkpoints if organizational priorities change mid-year
- Structured: have similar agenda each check-in and use similar terms to assess goals
- Prepared: staff member should reflect on progress against goals and prepare an update in advance of check-in

What else needs to happen to achieve this goal?

Are there items that have been de-prioritized that we should move to the front burner now? Are there items that we should be focusing on less now, in favor of higher priorities?

If off-track – what happened to throw us off-track? What are you doing to re-strategize plan for achieving that goal?

What could go wrong? What worries you? What can we do to mitigate that?

What should you be doing now to prepare for what will be happening over the next few months?
## 3. Progress Checkpoint Example

**GOALS**

John will learn how to use Microsoft Excel's VLookup and Pivot Tables. Using these skills, he will create a student lunch tracker by classroom. He will build upon his current Excel skills by completing 4 training modules in Lynda.com and receiving coaching from the DOO. Creating the tracker align with our broader school-wide goal of improving operational efficiencies. One training module will be completed each month, with the final project due January 9.

<table>
<thead>
<tr>
<th>STATUS</th>
<th>UPDATE</th>
<th>KEY ACTIVITIES FOR NEXT MONTH</th>
</tr>
</thead>
<tbody>
<tr>
<td>At Risk / Needs Attention</td>
<td>- After 1 month, completed VLookup but not Pivot tables (completed 1/4 modules). - Need to be better about scheduling trainings with DOO. - Downloaded all student data and have begun building out spreadsheet.</td>
<td>- Complete module 2 - Schedule 15 min biweekly meetings with DOO - Need to continue working on next draft of the spreadsheet, need guidance on layout.</td>
</tr>
</tbody>
</table>

- Not started
- At Risk/Needs Attention
- On track
- Complete
- Not met

Most of meeting time is spent here. Completed prior to meeting but reviewed & updated with manager.

http://www.managementcenter.org/resources/success-sheet-check/
Goal Setting

Development Planning

Progress Checkpoints

Performance Evaluation
4. Bringing Development Full Circle: Performance Evaluations

- **Set expectations.** Make clear what the performance evaluation is and is not (e.g., link to pay/promotion).

- **Connect to full staff development cycle.** Ground the performance review in the staff member’s annual goals and development plan.

- **Incorporate multiple perspectives.** Collect feedback from the employees’ peers, direct reports, and clients whenever possible (formal 360 or a quick solicitation of feedback).

- **Give time for reflection.** Share the review in advance of speaking with the employee.

- **Opt for consistency.** Calibrate reviews across managers / teams before they are delivered to increase fairness – avoid perceptions of “the easy-going manager” or “the tough manager.”

---

**Exemplar: The Management Center’s Performance Evaluation Template**

http://www.managementcenter.org/resources/sample-performance-evaluation-form-shorter/
3 Objectives for Fair Performance Evaluations

1. Are staff’s objectives clear, agreed-upon and measurable?
   - A supervisor’s expectations must align with their staff
   - Best practice is for staff to be involved in the creation of their goals

2. Have staff’s results been well documented throughout the year?
   - Don’t wait until the end of the year to document; beware of recency bias!
   - Maintain a fair and balanced approach by recording both successes and failures

3. Have you provided regular, meaningful, and consistent feedback throughout the year?
   - Use meetings as a place for immediate, ongoing feedback; think “praise in public, criticize in private”
   - Don’t avoid conflict!

https://www.forbes.com/sites/victorlipman/2012/10/04/4-steps-to-painless-and-effective-performance-evaluations/#29a5354b7b29
Session 1 Recap: What Is Operational Excellence?

Homework Share out

The Importance of Cross-Training

The Staff Development Cycle

Increasing Proactive Communication

Next Steps
Common Communication Breakdowns

A few purely hypothetical examples that we have never seen in any charter schools:

• An energetic academic admin has decided to start a new club for students on the weekend. Unfortunately, she didn’t let ops know about it and now all of the school’s security alarms are going off.

• The school’s receptionist is constantly complaining she has no idea what events are going on at the school as there is no common method of updating activities and no comprehensive school events calendar.

• There was staff turnover over the summer. It’s now October and the city was slammed by a freak snowstorm and no one knows how to cancel school through the media and what system to use to notify families and staff.

• The school has a well-documented staff procedures in the staff handbook. In fact, so well-documented that a lawyer made it and it’s 100 pages! Copies of the handbook were handed out to all staff, which they immediately signed off on as having received and “read”.

• The principal decided to surprise announce at the weekly staff meeting that the next day’s PD Day is actually going to be a mental wellness day! Unfortunately, no one from the ops team was present so they all showed up to work the next day.
Types of Communication

<table>
<thead>
<tr>
<th>Internal</th>
<th>Formal</th>
<th>External</th>
<th>Informal</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Staff meetings with a prescribed agenda</td>
<td>• Parent &amp; family newsletters</td>
<td>• Student recruiting events conversations</td>
<td>• Internal ad-hoc emails and messages with quick updates</td>
</tr>
<tr>
<td>• Retreats</td>
<td>• Parent &amp; family emails</td>
<td>• Greeting students &amp; families</td>
<td>• Morning “fly-by” check-ins with individual team members</td>
</tr>
<tr>
<td>• Internal newsletters</td>
<td>• In-school signage</td>
<td>• Visitor sign-in procedures</td>
<td>• Coffee or casual sit-down chats</td>
</tr>
<tr>
<td>• Other mass communication to staff</td>
<td>• Facebook &amp; Twitter feeds</td>
<td>• Student and family events</td>
<td>• “Walk &amp; talk” and casual teambuilding activities</td>
</tr>
</tbody>
</table>
Examples of **External** Proactive Communication

**Parent & Family Newsletters**

- **Back to School Night!**
  - August 3, 2017
  - 4:30-6:30 PM
  - Encourages parental involvement beyond academic priorities. Use these as a way to encourage updating contact information, staying on top of re-enrollment,

**In-School Signage**

- **New Number? New Address?**
  - Please be sure to update your contact information.
  - Highlights school community connectivity but also of practical importance such as calendar, visitor guidelines, & arrival and dismissal procedures
Homework: View the front office through the eyes of a parent!

One area with **multiple parent & family touchpoints is the front office**. It is where parents and other visitors **most frequently spend time** while at the school.

To help evaluate where your front office can improve, when you return to your school, physically enter the building and front office as if you were a parent. What do you see?

Some ideas to keep in mind:

- Is **pertinent signage posted** and/or **easily accessible**? (e.g. an annual school calendar, monthly meal calendar, lists upcoming sports or afterschool activities, parent and family events, required student forms, etc.).

- Is there signage to **highlight** and **promote school initiatives**? (e.g. perfect attendance awards, spelling bee champions, fundraiser winners, etc.)

- **Anything missing** which could help market the school to **prospective families** by **highlighting student** and/or **staff achievements**? (e.g. annual report, awards, test results, matriculated schools of graduates, “staff of the month” profile, etc.).

- When reviewing, note: Is it **current**? Is it **accurate**? Is it **visually appealing**?
Examples of Internal Proactive Communication

Monthly Schoolwide Email

Below are updates and reminders from Ops:

Misc. Reminders and Updates
- You will find a “Night Crew Cleaning Checklist” in your mailbox (also attached here)—please complete this next week to let us know how our night cleaning crew is doing.
- Please do not leave this out as last year we had the cleaning crew see it and complete it themselves.
- The weather is gorgeous—but please always remember to close and lock windows each night.
- H Drive—please let me know if you do not have or do not know how to access the H Drive on your computer.
- This will be where all of your documents will need to be saved this summer as we will collect and wipe all computers!

What’s Cookin’—This Week!
- Justin will be grilling burgers, veggie burgers and pulled pork.
- If you haven’t signed up yet, please do so here: [link]
- Bring your lawn games and laser chairs!

Teacher Appreciation
- On Friday, May 3rd, we will be providing Chipotle for lunch! Below is an order form, please submit your order no later than April 24th.
- [link]

Operations Survey Feedback
- Thank you for the honest and thoughtful feedback everyone provided in the most recent Operations Survey! This feedback is what helps me improve my role and serve you and our scholars better.
- Below are a few things we will be putting into practice based on your feedback:
  - Front Office Cleanliness—we heard from many of you that the front office could use some improvements when it comes to cleanliness! Starting Tuesday, I will be working with the Front Office Team on a few processes to keep that office looking cleaner and more inviting for staff and guests.
  - Proofreading Flaws—we will be working with the Front Office Team to improve proofreading skills to make sure that all flyers/letters sent home are free of errors.
  - Student Bathroom Cleaning—We will be implementing a mid-afternoon bathroom cleaning of student bathrooms. This will just be a quick wipe down of sinks/handles and picking up each floor on the 3rd floor and keep them a bit more presentable.

Weekly Internal Ops Blast

UPDATES W.O. 08/01/19

Fresh Fruit and Vegetable Program Reminder
As a reminder, the Fresh Fruit & Vegetable Program application is now available and that applications are due this Friday, May 3rd. GA, CAE, CAS, VGC, VPW, and VPW/VPW meet the criteria to apply to the program. It is a very simple application and VPW has had the program for the last two years with much success. Essentially, it is free money (VPW gets around $20k) for fruit & veggie snacks for students that are used instead of normal snack. For more information, see the attached email from last week.

FOIA Memo
Some of you may have received a request from Trechevio Law Offices for information about the school’s Preferred Meals contract. Please do not take any action except to forward the letter to Megan. For more information, please see the attached memo from Megan.

Q3 Vendor Survey
Third quarter vendor survey results are attached. There are two documents, one is the actual response data and the other shows how vendors are trending compared to Q1 and Q2. We just wanted to say thank you again for taking the time each quarter to provide this valuable feedback. It will be especially vital to have on hand as we wrap up the school year and look to get out ahead of the upcoming year. If you have any specific questions or concerns, please let Megan know.

Preferred Meals at May Ops Leader Meeting
And speaking of vendors, Janice from Preferred Meals will be joining us for the May 17th Ops Leader Meeting. If there are specific items you would like to discuss, feedback you would like to share, please let me know or come prepared to discuss. She would like to talk about what worked/did not work (MLK) during the year and look ahead to next year.

Heating Memo
Last week, Rob sent out a Spring weather memo. In case you missed it, we’ve included it here.

Highlights upcoming internal and external deadlines and best practices. Oftentimes works best with larger ops teams where communication missteps may more easily occur.

Showcases items of note with an eye toward the wider school community. Helps demonstrate operational “glows.”
Internal Proactive Communication Through Effective Meetings

1:1 Check-ins
- Individual, one-on-one meetings between DOO and each ops staff member
- Review prior tasks for completion and assist with roadblocks, prioritize upcoming week(s) tasks
- 15-30 minutes; occurs weekly or bi-weekly

Staff Meetings
- Entire ops staff meetings conducted by DOO
- Introduce and problem-solve schoolwide operational priorities
- 45-60 minutes; occurs monthly

Staff Retreats
- Attended by all operations staff and conducted by DOO with potential additional outside resources
- Step back on operational practices with a focus on strategic, forward planning; may be accompanied by professional development
- 90-120 minutes; occurs quarterly
Sample Recurring Agenda Topics:

1. Determine Priorities & Review Past Deliverables
   - Lay out a few key priorities with clear outcomes & specific deadlines staff member(s)
   - Review status of deliverables from last meeting to shout-out wins and provide guidance when challenges are not met

2. Gauge Temperature, Support, & Feedback
   - Open questions to gauge temperature of staff. “What challenges are you facing?” “What items do you need input on?”
   - Create a regular space for allowing for learning and prompts for engaging in feedback

3. Proactive Planning & Reinforcement of Goals
   - Send out an agenda in at least 24 hours in advance of meeting.
   - Compile meeting notes to send after the meeting
   - Maintain standing area with documented goals as a reminder how smaller tasks lend themselves toward bigger picture
### Effective Meetings Must Include the Right People

<table>
<thead>
<tr>
<th>Current State (at many schools)</th>
<th>Try Instead...</th>
<th>So What?</th>
</tr>
</thead>
<tbody>
<tr>
<td>• DOO is called into leadership meetings when operational issues arise</td>
<td>• DOO attends and actively participates in all leadership team meetings. A designated time to report out is included on the agenda.</td>
<td></td>
</tr>
<tr>
<td>• Operations staff finds out about pertinent news (field trips, after-school events, terminations, etc.) at the last minute and are expected to respond rapidly</td>
<td>• DOO attends and actively participates in all-staff meetings, highlighting updates of significance and answering questions as needed.</td>
<td></td>
</tr>
<tr>
<td>• Top-down communication: instructional leaders dictate what they require from operations staff to support academic program</td>
<td>• Ops staff attend all-staff meetings; if difficult because of scheduling, consider rotating ops staff who “report back” to whole ops team</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Designated ops members should be at relevant instructional meetings (e.g. grade level meetings if planning upcoming events)</td>
<td>Ops inclusion in instructional and all-staff meetings establishes operations as a key part of the greater school community.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>It also helps them anticipate and prevent issues, rather than problem solving after the fact.</td>
</tr>
</tbody>
</table>
Consistency is key. It’s better to have a short, regular, recurring email blast or family newsletter than long, sporadic communications. Likewise, with meetings, use a similar structure / agenda each time so staff know what to expect.

Don’t force it. If there isn’t much information to include or discuss for a particular week/month, it’s ok! (And congratulations!)

Explicit ops presence is vital. Encourage academic leadership to include ops at appropriate meetings, provide designated space within newsletters, etc. to give ops a voice and inform parents and/or staff of critical information.

Don’t forget informal communication. Soft touchpoints such as morning check-ins with your team, greeting parents and students, and interactions with instructional staff and community members at school events all contribute to positive, proactive communication.
Session 1 Recap: What Is Operational Excellence?

Homework Share out

The Importance of Cross-Training

The Staff Development Cycle

Increasing Proactive Communication
Recap: Five Domains of Operational Excellence

There are many factors which encourage well-run school operations. We believe there are five pillars to creating an effective operational environment.

- Increase accountability
- Reduce confusion
- Boost team cohesion and forward planning
- Prevent things “falling through the cracks”

Session 1
- Clear Roles & Responsibilities
- Standard Operating Procedures
- Cross-Training

Session 2
- Replace “fire fighting” with forward planning
- Proactive Communication
- Staff Development

• Improve team flexibility and overall performance
• Create roadmap for operational procedures
• Decrease new staff training burden
• Foster internal coverage of vacancies
• Build skills towards promotion
• Develop cadence for updates and streamline information
• Raise awareness of ops team contributions
• Encourage staff ownership over advancement
• Promote staff engagement and professionalism
• Improve service level while providing growth opportunities
• Increase consistency of deliverables
• Build skills towards promotion
• Improve service level while providing growth opportunities
• Encourage staff ownership over advancement
• Replace “fire fighting” with forward planning
• Develop cadence for updates and streamline information
• Promote staff engagement and professionalism
• Improve service level while providing growth opportunities
• Encourage staff ownership over advancement

www.ed-ops.com
Our Perspective on Implementation / Building Ops Excellence

**There is no silver bullet.**
Pursuing incremental improvement across the five core areas is more likely to lead to success.

**Do not over-engineer.**
A simple, consistently implemented process aligned with the school’s size and needs is always better than a more complex one.

**Take ground gradually, and keep it.**
It is best to go slow or take a measured approach, especially at first, to avoid re-work and staff frustration.

**Explicitly identify dependencies.**
The sequence of implementation will depend on when certain steps are taken (e.g. cross-training can only begin once roles are defined).
Homework: Create a "Strawman" Implementation Timeline

<table>
<thead>
<tr>
<th>Clear Roles &amp; Responsibilities</th>
<th>Now (2-4 weeks)</th>
<th>1-3 months</th>
<th>4-6 months</th>
<th>7-12 months</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Create SOPs</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Cross-Training</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Staff Development</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Proactive Communication</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Thank You!

For more information about EdOps:
John Roussel  
NYC Regional Director  
john@ed-ops.com  
310-710-4559  
www.ed-ops.com

Breanna Day  
Breanna@ed-ops.com  
518-878-2801  
www.ed-ops.com

Kim Swenson  
Kimberly@ed-ops.com  
440-488-0175  
www.ed-ops.com