Five Steps to Building Operational Excellence
Session One

April 15, 2019
About EdOps

EdOps is an education consulting firm specializing in the finance and operations work of leading schools. Our mission is to minimize the financial, operational, and compliance demands of running a school and to support education leaders with data-driven insights to improve student outcomes. Our range of services includes accounting, procurement, grants management, student data management, human resources, strategic consulting, and facilities finance support.

With a growing team of 60+ education professionals around the country, EdOps works with a range of schools and networks around the country to ensure operational excellence in support of student achievement.

Your Facilitators

John Roussel, NYC Regional Manager / National Director of Data
John Roussel currently serves as the National Director of Data and New York City Regional Manager for EdOps. In this role, he leads the expansion of our offerings in New York City and manages our data services team, which currently supports 20+ school clients nationally. Prior to joining EdOps, John served as an Education Pioneers Fellow with the New York City Department of Education and a Teacher For America corps member in Atlanta, GA. John holds an MBA from Howard University and a BA from the University of California at Berkeley.

Kim Swenson, Finance Specialist
Kim joined EdOps in 2017 from Breakthrough Charter Schools in Cleveland, OH. At Breakthrough - a high performing network of 11 charter schools - she was the Director of Operational Learning and Development and led a number of network-wide operations initiatives, including the development of a multi-year operations training program. Prior to working for the central office, Kim served as Director of Operations at one of its elementary schools. She holds a BA in Economics from John Carroll University, and a Master’s in Economics from Cleveland State University.

Vera Krimnus, Consultant / New Markets Ambassador
Vera joined EdOps in 2018 from a DC-based charter school, where she worked as Director of Performance Management and a Broad Resident. Previously she worked as a Director of Strategy for Teach For America, advising senior leaders on talent and operations issues. Earlier in her career, Vera worked as a strategy consultant for large social impact organizations, such as UNICEF and the World Bank. She holds a BA from Wesleyan University’s College of Social Studies, an MBA from the Wharton School at the University of Pennsylvania, and an MA from the Lauder Institute at the University of Pennsylvania.
Session Objectives

Throughout the course of the two operations excellence sessions, we will:

- 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 & implement improvements at your schools
- Assess the state of your schools’ current operational strengths and weaknesses

Five Domains of Operational Excellence

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

1. **There is no silver bullet.** Pursuing incremental improvement across the five core areas is more likely to lead to success.
2. **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.
3. **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/or staff frustration.
4. **Explicitly identify dependencies.** The sequence of implementation will depend on when certain steps are taken (e.g. cross-training once roles are defined).
Scenario 1: Roles & Responsibilities

On a Friday morning in October, the board chair of Apex Charter School receives an email from an irate parent, which she immediately forwards to the school's principal. The mother writes that her 7th grade daughter skipped school earlier in the week, but no one from the school notified her of the absence. She only found out while overhearing her daughter bragging to friends about cutting classes. She knows that the Student & Parent Handbook states that the front office calls parents anytime there are unexcused absences. She is very upset, threatens to unenroll her daughter, and wants to know why her daughter’s absence was not reported. Fortunately, the principal is able to placate the parent by assuring her that this oversight will never happen again.

Internally, the school team needs to determine what caused this break from protocol, and what steps will be taken to ensure it won't happen again.

Do Now #1: Roles & Responsibilities Scenario Reflection

What internal breakdowns may have caused this oversight?

What steps would you take to ensure this situation won’t happen again?

At your school(s), who is currently responsible for tracking attendance and notifying families of absences?
Tool Spotlight: RACI

RACI enables teams to clearly define each person’s role for each process or task. For each task, individuals are assigned one of four roles:

- **Responsible**: “The Doer.” The individual(s) who actually completes the task.
- **Accountable**: “The Buck Stops Here.” The individual who ensures task/process succeeds. Should only be 1 person; has veto power; may or may not be the same person as “the doer.”
- **Consulted**: “In the Loop.” Those consulted prior to the final decision/task. Typically a subject-matter expert; input affects process/task.
- **Informed**: “Keep in the Picture.” Those who must be informed after the task. One-way communication—NOT solicitation for feedback or advice.

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**Do Now #2: Example RACI Matrix**

Use the scenario on the last page to fill out the RACI matrix below with R, A, C or I.

<table>
<thead>
<tr>
<th>Tracking Attendance</th>
<th>Potential Players</th>
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<tbody>
<tr>
<td>Tasks</td>
<td>Front Office</td>
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### Scenario 2: Standard Operating Procedures

Apex Charter School is preparing to open its third campus next school year. It's May 1, and they are anticipating hiring and onboarding over 20 new teachers in the coming months. The staff onboarding process involves several departments from the central office (Human Resources, Facilities, IT, Compliance (EMIS), Accounting) as well as school-based staff (Director of Ops, Principal). They want to leave no room for error and ensure all new teachers are able to hit the ground running once they start on August 10.

**What does each of the positions or departments mentioned above need to do to ensure a successful onboarding for these 20 new hires? On what timeline?**

#### Do Now #3: SOPs Scenario Reflection

For each of the positions/departments involved, list some tasks they may be responsible for in the offer letter process.

- **Facilities:**

- **IT:**

- **Human Resources:**

- **Compliance:**

- **Accounting:**

- **Director of Operations:**

- **Principal:**
Do Now #4: SOPs – Your Recurring Tasks
Jot down a list of recurring tasks you undertake in your current role.

Do Now #5: Plot Your Tasks on Impact / Effort Matrix
Jot down a list of recurring tasks you undertake in your current role.
Homework

1. Clarifying Roles & Responsibilities
Select a job description from your school’s operation team. Review each bullet and determine whether each task corresponds to an R, A, C, or I. Once completed, review the document and answer the following:

- In practice, does this position still perform all these job functions?
- Are there essential job functions (R or A) which should be included, but are missing?
- If there are C’s and I’s, are they necessary to include in this position’s JD?

Based on these answers, develop a revised job description.
Please bring the original and the revised job description to the next session.

2. Writing Standard Operating Procedures
Select one or two tasks from your “Quick Wins” quadrant and create an SOP. If an SOP already exists, review and refine the existing SOP. If you’re feeling ambitious, choose a task from the “Major Projects” quadrant, instead.

Please bring the SOP to the next session.
Participant Reflection

What did I learn today?

What questions do I need to answer?

My next steps are....

Other reflection:

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