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 in multiple states to ensure operational excellence in support of student achievement.

Your Facilitators

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.

Breanna Day, Student Performance Data Specialist
Breanna Day currently serves as a Student Performance Specialist for schools in New York City and New Orleans. She has supported schools with everything from transitioning and setting up student information systems to the development of standard reporting and reporting cycles for school leaders and Boards. Prior to EdOps, Breanna worked for an education technology company, where she managed marketing and strategy analysis for elite university graduate degree programs. Breanna holds a B.A. from Dartmouth College where she studied Engineering Sciences and Studio Art.
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. **Clear Roles & Responsibilities**
   - Increase accountability
   - Reduce confusion
   - Boost team cohesion and forward planning
   - Prevent things “falling through the cracks”

2. **Standard Operating Procedures**
   - Increase consistency of deliverables
   - Create roadmap for operational procedures
   - Decrease new staff training burden

3. **Cross-Training**
   - Improve team flexibility and overall performance
   - Foster internal coverage of vacancies
   - Build skills towards promotion

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

5. **Staff Development**
   - Promote staff engagement and professionalism
   - Improve service level while providing growth opportunities
   - Encourage staff ownership over advancement

Our experience working with school leaders across the country has also led us to develop a perspective on operational excellence:

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).
Cross Training

Do Now #2: Selecting Processes for Cross Training

Reminder: Processes to prioritize include...

- **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.

Please identify 2-3 operations processes that are good candidates for cross training.

What Cross-Training Looks Like Depends on Complexity & SOPs

<table>
<thead>
<tr>
<th>Written SOP Exists</th>
<th>Written SOP Does Not Exist</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simple Process</td>
<td>Set aside time during regular one-on-one meetings to teach the process. Depending on the complexity, this can be done over the course of one meeting or several.</td>
</tr>
<tr>
<td>Complicated Process</td>
<td>Designate significant time for the trainee to shadow the trainer, writing notes which can eventually be incorporated into a working SOP.</td>
</tr>
<tr>
<td></td>
<td>Have the trainee attempt to follow the process, follow-up on any areas of ambiguity or where further reinforcement may be needed (bonus: this helps determine if SOPs are useful!)</td>
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</tbody>
</table>
Do Now #3: Designing Cross Training

Which one process from the last page will you focus on?

What general approach to cross-training is appropriate for this process? Consider matrix on the last page as a starting point: How complex is the process? How much documentation exists?

Whom you will be cross training? Why is that a good choice?

In what situations will the person who is cross trained step in?
Staff Development Cycle

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

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.
Do Now #4: Develop SMART Goals

Pick a member on your team or yourself and write 2-3 SMART goals. Please refer to components of SMART to check your goal. (Specific, Measurable, Attainable, Relevant, Timely)

Who is the goal for?

SMART Goal #1

SMART Goal #2

SMART Goal #3
Do Now #5: Drafting an Individual Development Plan

For one of the SMART goals you developed on the last page, begin to draft an Individual Development Plan using 70/20/10, below.

**Selected SMART Goal:**

<table>
<thead>
<tr>
<th>On the Job Assignment</th>
<th>Mentoring &amp; Coaching</th>
<th>Coursework &amp; Training</th>
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</thead>
<tbody>
<tr>
<td>What experiences will provide opportunity to learn this skill?</td>
<td>How will this staff member get feedback and help?</td>
<td>What resources exist to train staff?</td>
</tr>
<tr>
<td>70%</td>
<td>20%</td>
<td>10%</td>
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</table>
Homework #1: Operational Excellence Planning

Now is the time to translate these best practices to tangible next steps. What can you do to start building even better operations?

<table>
<thead>
<tr>
<th>Domains of Ops Excellence</th>
<th>Now (2-4 Weeks)</th>
<th>1-3 Months</th>
<th>4-6 Months</th>
<th>7-12 Months</th>
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<tbody>
<tr>
<td>Clear Roles and Responsibilities</td>
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<tr>
<td>Create SOPs</td>
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Homework #2: 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?

Is pertinent signage posted and/or easily accessible? (e.g. school calendar, meal calendar, upcoming sports or afterschool activities, 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. awards, test results, “staff of the month” profile, etc.).

When reviewing, note: Is it current? Is it accurate? Is it visually appealing?
Participant Reflection

What did I learn today?

What questions do I need to answer?

My next steps are....

Other reflection:

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