Education
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Covid 19 Retrospective - Looking in the Mirror

May 12, 2020 | 10:00 AM PST/1:00 PM EST

—

COVID-19 Webinar Series

Share your name, role, and district

What is one thing that you would go back and **do over again** in the last week? And why?

Put your response in the chat box.

All Panelists + Attendees

Chat

Type message here...

2

Welcome

Angela Kennedy Toon

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Access today's slides:
bit.ly/EERetro

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Our Agenda

Being a Responsive Org

What is a Retrospective?

Our EE Retrospective

- Teaming

- Information Sharing

- Decision Making

How you can do this too

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Our Agenda

Being a Responsive Org

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What is a responsive organization?

"Responsive Organizations are built to learn and respond rapidly through the open flow of information; encouraging experimentation and learning on rapid cycles; and organizing as a network of employees, customers, and partners motivated by shared purpose."
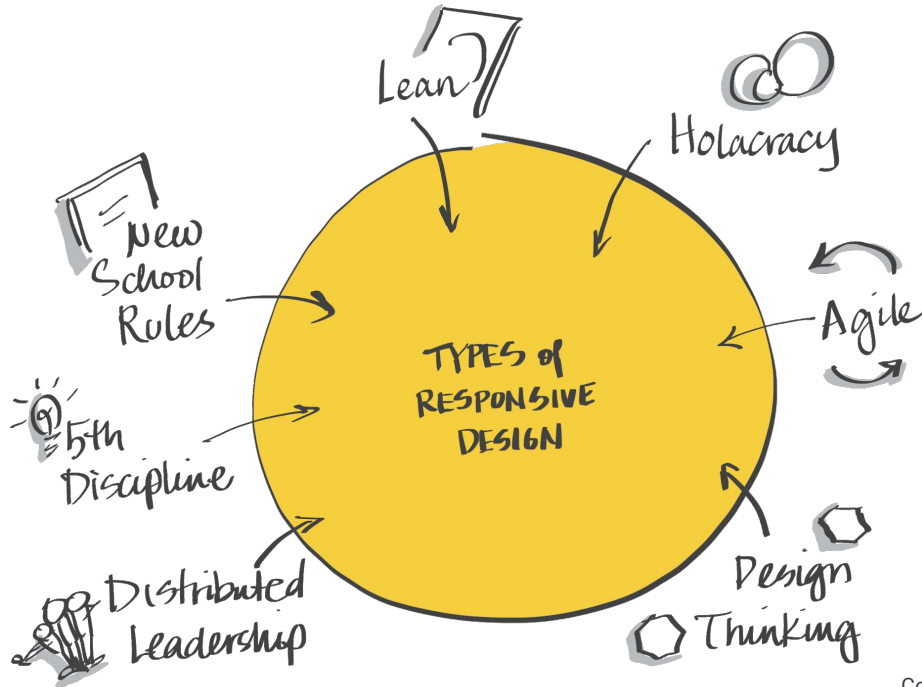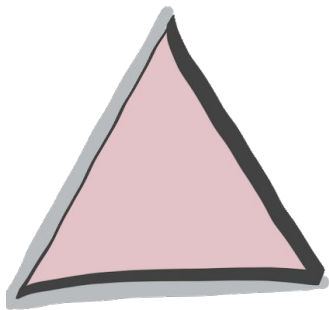
Responsive is also known as B Corp, Beta, Emergent, Exponential, Open, Participatory, Teal

*There are ~2,000 responsive orgs out of 3 million companies (with 10+ employees) in the world.*

Lean

Holacracy

New School Rules

5th Discipline

Agile

TYPES OF RESPONSIVE DESIGN

Distributed Leadership

Design Thinking

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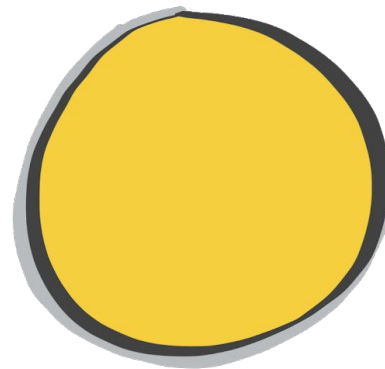
The Shape of Our Organization

2010 - 2013

- EE founded as a product company
- Using lean startup method
- Top down objectives
- Managed with certainty
- Focus on scalability
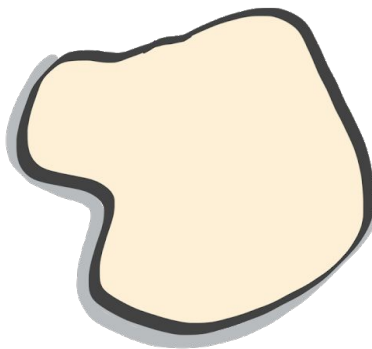
2014 - 2016

- EE shifting to more services, less product focus
- Incorporate design thinking + agile thinking
- Reacting to rapid changes
- Noticed limits of hierarchy

2017 - Today

- EE transitions fully to be a consulting company with a partner structure
- Embracing uncertainty
- Shift to self-managed structures with holacracy and responsive org design

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Our theory of action is guided by three levels of change

WHERE WE WERE

OUR ORGANIZATION
was struggling to adapt to uncertainty.

OUR TEAMS
were working in silos.

OUR PEOPLE
were passive learners.

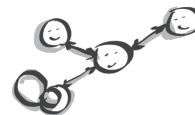**If our org design is more responsive, then...**

WHERE WE ARE GOING

OUR ORGANIZATION
will organize to adapt to uncertainty.

OUR TEAMS
will be more collaborative.

OUR PEOPLE
will be active learners.

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How we live out being a Responsive Organization @ EE

Roles + Accountabilities are assigned based on...
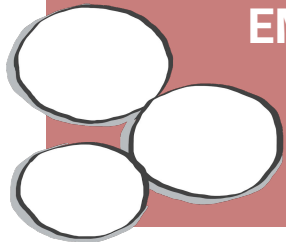**PURPOSE + PEOPLE'S PASSIONS**

Meetings have...
ACTIVE PARTICIPANTS

Development is...
DRIVEN BY ME

Decision Making is...
EMPOWERING, EFFICIENT, EFFECTIVE

PEOPLE...
drive processes

Projects are...
ADAPTIVE

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What did this mean for us when faced with COVID 19?

OUR PEOPLE

Where are our team members (since we have so much travel)?

How do we know how they are doing and feeling?

How should we to collaborate as a team differently now?

OUR TEAMS

How do we engage with our clients in a meaningful way?

What client work is planned for the coming weeks?

How might we continue to support our clients with their new needs?

OUR ORGANIZATION

What new work needs to get done right now?

What can we put on the back burner - but should be addressed soon?

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Responding to COVID-19 required execution QUICKLY

PHASE		Typical EE Project	COVID19
INITIATION	Kickoff meeting, define the theme, set clear expectations; Green light project	Days	Hours
PLANNING	Create sprints, roadmaps, roles, and SMART goals	Weeks	Hours
EXECUTION	Implementation phase, regularly hold meetings, report progress, and adjust	Months	Weeks
CLOSURE	Evaluate success of the project, what went well, what was challenging	Months	TBD

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We leaned on **Rapid Iteration**
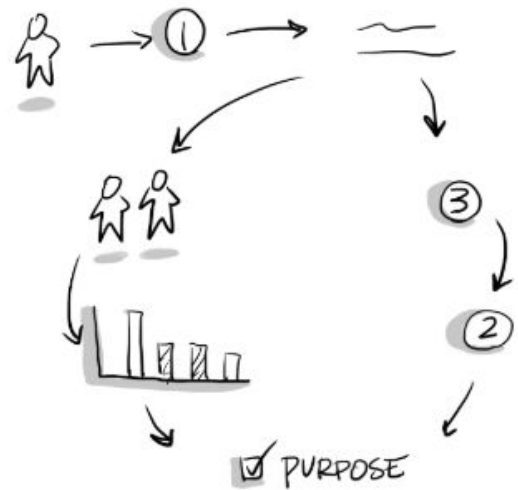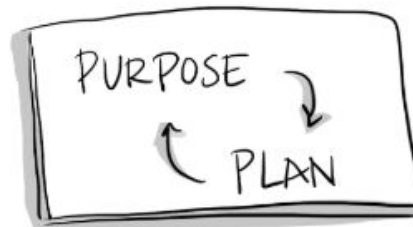
Our Agenda

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Over time, our ability to predict future needs decreases

Time

Our Plan

Reality

Predictability decreases

The variability between what we planned for and the reality impacts our ability to predict:
- Our people's needs
- Allocate resources
- Address user requirements
- Solve for our biggest priorities
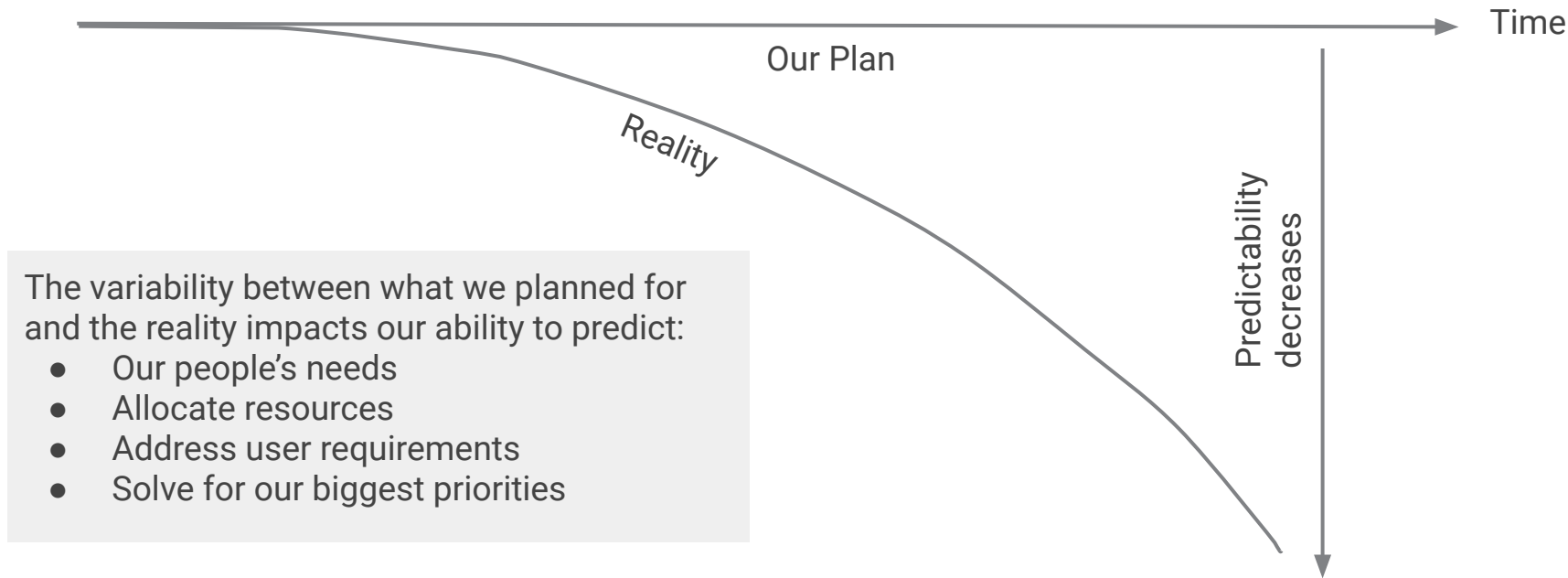
This is exacerbated in times of crisis

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What is a Retrospective

At set time intervals throughout a project, we create a safe space to reflect on and discuss what worked well and what didn't so that we can improve.

We focus the conversation and data collection on what enabled / prevented our team from hitting work goals so that we can understand broadly:

| What should we **continue** doing? | What should we **stop** doing? | What should we **start** doing? |

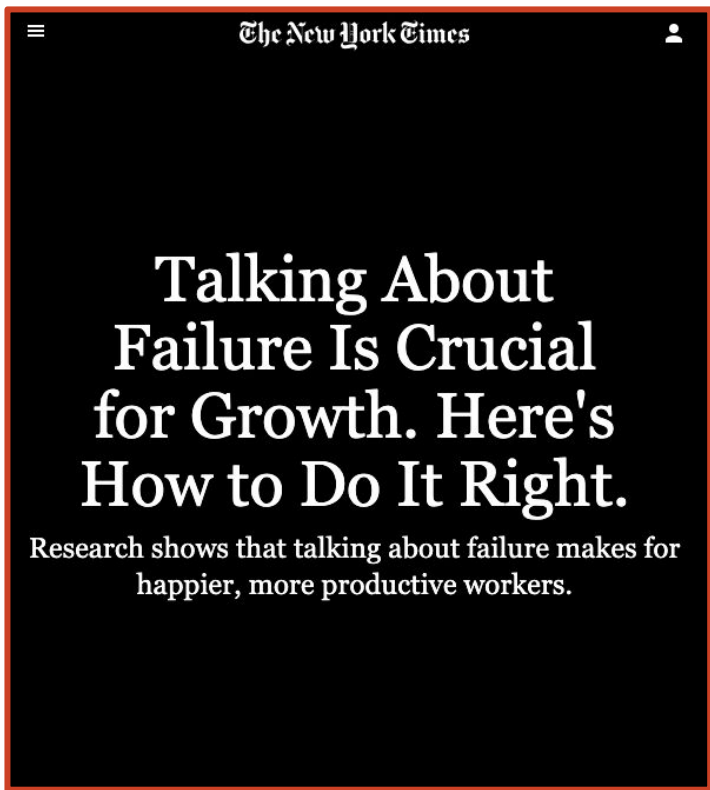This information is then used to **pivot** our approach - adopting new action steps, adjusting our roles and responsibilities, improving our processes, etc.

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Why do we take a look at what worked and what didn't?

The New York Times

Talking About Failure Is Crucial for Growth. Here's How to Do It Right.

Research shows that talking about failure makes for happier, more productive workers.

"Taking the time to reflect on and communicate about unwanted outcomes can go a long way in creating more congenial, trusting and ultimately productive workplaces."

● Frame it in a question + hypothesis - changes the tone

● Discussion prevents replication

● Complexity reduces blame and increases learning

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Our Retrospective Mindset, based on our Leadership Competencies

KNOW YOURSELF

NURTURE TRUST

CULTIVATE CURIOSITY

COMMUNICATE CONSTANTLY

LISTEN DEEPLY

DECIDE DELIBERATELY

Understands how personal experiences, values, and strengths impact leadership philosophy, practices, and interactions

Seeks out and models ways for self and others to constantly ask questions, learn, and share

Asks questions and listens to learn, empathize, reflect, and illuminate insights

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We focus today on these three "rules" to undercover ways to improve our support of our people, our teams and our clients.
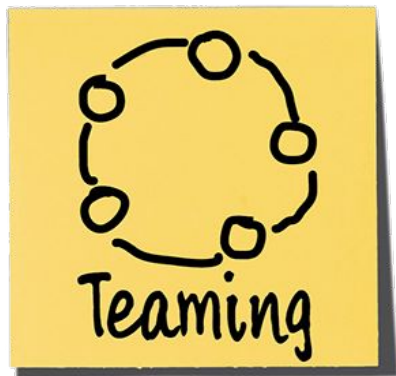
Build Trust and Allow Authority to Spread

Harness the Flow and Let Information Go

Aim for "Safe Enough to Try" versus Consensus
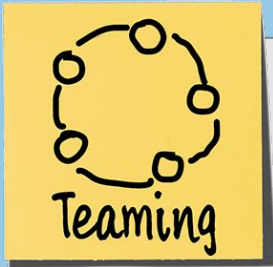
Teaming

What language do you use when talking about failure?
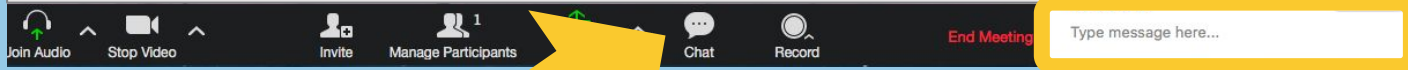
Chat

Type message here...

Join Audio | Stop Video | Invite | Manage Participants 1 | Chat | Record | End Meeting

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Our Agenda

Being a Responsive Org

What is a Retrospective?

Our EE Retrospective

- **Teaming**
- Information Sharing
- Decision Making

How you can do this too

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How did we respond?
"4 Rocks" to define and distribute the work

Teaming

Establish Creative Partnerships

Expand Our Network

Deepen Relevance to Our Current Clients

Readiness for COVID Pivot

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How did we respond?
COVID-19 Taskforce - breaking down the work

How did we respond?
Adjusted Meetings for COVID-19 Response

FIVE TYPES OF MEETINGS

MENTOR	INFO	TACTICAL	STRATEGY	GOVERNANCE
1-1 or small group meetings focused on learning and development	Project, team, or org-wide "status" meetings focused on sharing info about the work being done	Project or team meetings focused on moving the work forward	Project or team meetings focused on doing the work (analyzing, planning, brainstorming, etc.)	Meetings that set the policy that will guide current and future work

PDA convos and Personal Reach Outs

Friday - Sync All Company Weekly Status

COVID Taskforce 2x Weekly

1x Weekly at Company wide Governance
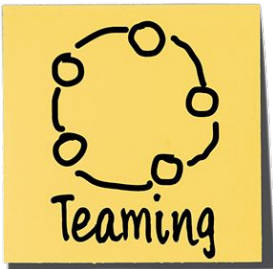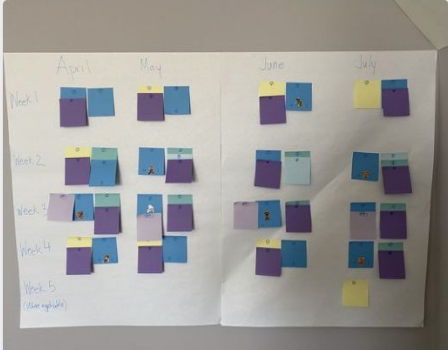
Weds - Async Email

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How did we respond?
Adjusted Meetings for COVID-19 Response

What went well?

- We didn't need to convene as many people at once. People are able to move in and out as necessary → like a movie set.
- Creating new teams to focus on strategy allowed for existing teams to work tactically to address needs.

What did we learn?

- How can we organize our team for what people enjoy + what they are good at when there is new work. This requires us to understand the skills and strengths of our people and be creative on how to leverage that.
- Some people on our team were flexible + other people need more support. Those who needed more support were stronger in more stable roles.
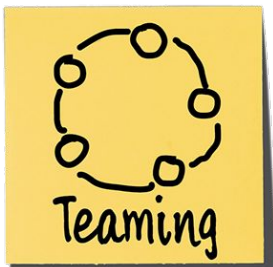
How is it reshaping us?
Bringing this way of working to our clients

Teaming

Example Teams Convo with Client

RESPONSE & RECOVERY PROCESS			
Bucket of Work	**Short Term Response**	**2019 - 2020 SY Close Out**	**2020 - 20201 SY Start Up**
Purpose	Problem solving as crisis-related issues emerge in the first 90 days post-event.	Addressing normal district operations through the end of the current SY.	Addressing long-term strategic decisions related to impact of crisis on the district.
The Work *Areas this bucket will address will include, but are not limited to...*	• Meal coordination & distribution • Laptops / 1-1 device distribution and maintenance • Social Media Updates • Remote Learning Set-Up	• Graduation • School close-out logistics	• Re-entry planning and consideration • Continuous Learning Planning • Revised School Safety Plan • District Culture Reset
Ideal Team Mindsets *Individuals who work w/in this 'bucket' are...*	• Flexible, and agile collaborators • Highly responsive and adaptable to change	• Detail-oriented • 'Nuts and bolts' thinkers • Possess institutional knowledge of district policies and procedures	• Innovative • Big-picture thinkers • Highly knowledgeable of district and community landscape

SUBSCRIBE

By: Natalie Hall on May 4th, 2020   🖨 Print/Save as PDF

3 Ways to Tell You Lead a Responsive Team in Times of Crisis

ORGANIZATIONAL LEADERSHIP & CHANGE MANAGEMENT | DISTRICT LEADERSHIP

There is a strange contrast between moments during this time. I wake up with the sun, hearing the birds chirping and families playing with their young children outside. Then, during my near-daily walk around my neighborhood, I offer a timid hello to those I pass. Our eyes meet, and I see the corner of their eyes turn up while the rest of their face is obscured by a mask. We both move in our opposite directions down the sidewalks, and life carries on - and so does the work at Education Elements.

Every day, I speak with my co-workers and various clients about this very contrast: the eerie stillness of the world, marred with the daily chaos of the past month. During these internal and client-facing conversations, my teammates

LEVERAGING LEADERSHIP DURING CRISIS
@ANDREAGOETCHIUS @edelements

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How is it reshaping us?
Circles + Who in Involved

Teaming

Example of Meeting Structure for H&H Circle

Meeting Structure

Week 1	Week 2	Week 3	Week 4
Health & Happiness Meeting 1 hr	**People Ops Meeting** 30 min	**Responsive/Learning Org Meeting** 1 hr	**People Ops Meeting** 30 min
Attendees: David, Megan, Monica, Pam, Shelby	**Attendees:** Monica, Pam, Shelby	**Attendees:** Megan, Jill, Monica, Pam, Shelby	**Attendees:** Monica, Shelby
Accountabilities Covered: - Ensuring people operations are supporting the company's mission and values - Measuring and maintaining high levels of employee satisfaction	**Accountabilities Covered:** - Maintaining a hiring process that attracts and selects our best people and is driven by cultural contribution instead of fit. - Ensuring that all employees have their administrative needs attended to (leave, benefits, approvals, HR support, technology, etc.)	**Accountabilities Covered:** - Create opportunities for all individuals to successfully grow, develop and support themselves and their teams - Ensuring everyone has opportunities to collaborate and access to the information and resources they need	**Accountabilities Covered:** - Maintaining a hiring process that attracts and selects best people and is driven cultural contribution instead fit. - Ensuring that all employees have their administrative attended to (leave, benefits, approvals, HR support, technology, etc.)

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Example of Links to other circles for Pivot with Covid Team

Pivot With Covid Circle

LINK - Services, Recovery Guides
This will end, but we will never forget
Accountabilities
- PROJECT: Works across service lines to create "Recovery Guide"
- Long term - Service Line Lead

LINKS - Market Research, IMPACT
Keeping us 'On Trend' since 2020
Accountabilities
- Investigates research questions
- Gathers insights from DI + Partners from convos with clients + prospects

Virtual Delivery
Beam me up, EE
Accountabilities
- PROJECT: Virtual Conference
- Designs + tests out new delivery methods

Design Challenger, LINK - DI
Think BIG and LOUD and in NEON
Accountabilities
- PROJECT: EE-wide design challenge
- Amps up the voices

LINKS - PCC, Learning Org
Always be hustling
Accountabilities
- Align with prospects + opportunities
- Tests out new thoughts + messages
- Connects across circles

LINK - Marketing
Sails swiftly thru internet channels
Accountabilities
- Designs and launches campaigns that support post-covid work
- Shares ways to amplify messages

LINK - G2 Circle
Follow that money!
Accountabilities
- Share requirements for grant funding
- Aligns our post-covid work w/potential funding sources

Lead + LINK - MPP
Accountabilities
- Brings in the Covid Response Team + MPP perspective
- Keeps train moving forward

What's one way your teams are collaborating differently now that you are virtual?
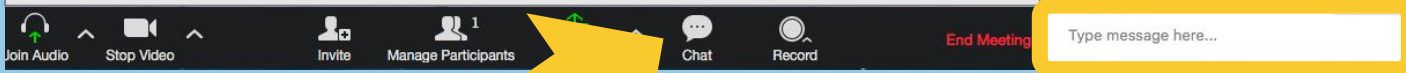
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Our Agenda

Living out Responsive Planning

What is a Retrospective?

Our EE Retrospective

- Teaming
- **Information Sharing**
- Decision Making

How you can do this too

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- Spread of misinformation comes from:
  - **Limited access** to information
  - Overreaching **misinterpretation**

- We are **both** providers and receivers of information:
  - As providers, figure out the best way to engage receivers
  - As receivers, pay attention to the information according to its purpose, ask for more information, and seek clarity

5 Key Parts of Messages (Jeff Bezos + Amazon)

1. **Start with the brutal truth.**
   "This isn't business as usual, and it's a time of great stress and uncertainty. It's also a moment in time when the work we're doing is its most critical."

2. **Set the stakes and express gratitude.**
   "We're providing a vital service to people everywhere, especially to those, like the elderly, who are most vulnerable. People are depending on us."

3. **Manage expectations.**
   "I'm sad to tell you I predict things are going to get worse before they get better."

4. **Address the obvious problem.**
   "When our turn for masks comes, our first priority will be getting them in the hands of our employees and partners working to get essential products to people."

5. **Promise a singular focus.**
   "Wholly focused on COVID-19 and on how Amazon can best play its role."

How did we respond?
Sharing Messages

SMALL GOOD TO KNOW	MEDIUM IMPACT	LARGE AWARENESS
Sharing updates related to pandemic, with links and articles to learn more	*Messages that impact team members on their day-to-day work and how to do work*	*Messages with high risk if misinformation, with impact to all of our team members.*
E.g. Updates on our Districts, What's in the News	*E.g. Policy updates on travel, PTO*	*E.g. Company financials, FMLA*
▼	▼	▼
Slack Channels	***Weekly Emails + Team Updates***	***All Company, In person Messages***

How did we respond?
Sharing Messages

Information Sharing

SMALL ————————————————————————————————— **MEDIUM**

#ee-covid-19-resources

Drew 8:37 PM
https://www.ideo.com/journal/four-strategies-to-chart-a-path-forward-when-there-is-no-map

ideo.com
4 Strategies to Chart a Path Forward When There is No Map
When there is no precedent, ambiguity can be the mother of innovation (41 kB)

Shelby McIntosh 9:55 PM
This is so good @Drew thanks for sharing

Today

Courtney 7:39 AM
Love this! The last piece around constraints really connects to responsiveness and our NSR work around pivoting

simma 8:18 AM
Yea - great article + aligned to our 4 rocks! @Drew

Shelby McIntosh
to EdElements All

Wed, Mar 25, 7:28 PM (6 days ago)

Happy Wednesday! Here's your midweek COVID response update.

There are no changes to our current company policies and guidelines this week. The latest metrics re: impact on our active projects are as follows:

- Districts that are highly impacted with school/district closure or major changes are at 11
- 64/65 (98%) of projects have received communication from EE
- 27/65 (42%) of projects are not currently impacted (down from 33/65 last week)
- 10 districts/projects need space before making decision
- 9 projects have had postponed and/or cancelled onsite visits
- 26 projects are shifting to virtual or already doing virtual work, 2 have a combination of virtual work and postponed onsite visits

A few of you have reached out to share how your individual circumstances during COVID impact when and how many hours you can work, which is exactly what you should do if you find your situation is impacting how fully you can commit to your work. We also know that reductions in travel and projects have redefined work for many of you. What we need from everyone right now is a combination of individual reflection on how our work can evolve and adapt in the current situation and collaboration with your peers to experiment and innovate.

We're closely monitoring school closings and extensions to those closings and working closely with our current clients to develop plans. We'll continue to answer questions at the weekly status meeting the best we can, but there is still so much unknown about how this will impact our business, to what extent, and for how long. What we DO know is that efforts like the webinars, coffee chats, and office hours are being well-received.

As always, we appreciate your continued patience and support as we do our best to take action and stay transparent.

Shelby

Internal EE Partner Team Weekly Updates COVID-19
April 24 * April 17 * April 10 * April 3 * March 27 * All COVID Resources

April 24th Weekly Recap and Looking at Next Week

Creative Team Work from this Week #InnovateAndIterate #CelebrateSuccess

- **Equity Digital Dialogue** every Thursday starting 4/23 from 2-3 pm EST with Dave, Natalie H, Crystal and 10 leaders to have deep and judgment free conversations around equity in schools anchored in data points.
  - *Week 1: What lasting changes do you think COVID-19 will bring our economy, education system, and/or funding structures?*

- Jill and Jason created a NC and SC - **"Thought Leader Cohort - Collaborative Conversation"**. They specifically chose who they invited from different districts in NC and SC that was a mixture of clients and potential-clients. The cohort will meet once a week for the next four weeks to connect, collaborate, and learn from each other. Learn more here: Link to website.

Resources to Share, Positive Deposits in the Cup #NeverStopLearning

- We hosted our first - Virtual Personalized Learning Academy in SC and even though the turnout was not what we expected, we did get two potential leads and learned a lot for our next virtual sessions. The team has shared these learnings with the events circle. To watch Jamie Casap's 15 minute keynote click here.

- There were quite a few EE-Led Webinars hosted this past week with awesome attendance!
  - **COFFEE CHAT:** PL within #remotelearning plans **(15 registered, 6 attended)**
  - **WEBINAR:** Communicating through the Next Phase of Remote Learning **(120 registered, 27 attended)**

Learning Opportunities Next Week #NeverStopLearning #BringJoyToYourWork

- EE Led Webinars **next week** you can share or sign up to attend: April 27- May 1st
  - Webinar April 27, 1:00 PM CT: Building A Strong Culture in Times of Change (for Teachers)
  - Webinar April 29, 11:00 AM CT: Sharing A Moment of Calm with Educators: Meditation & Self-Care Tips
  - Webinar April 29, 1:00 PM CT: Building & Sustaining Responsive Virtual Cultures as a Coach
  - Webinar April 30, 1:00 PM CT: Creating Culture, Connections and Community for District Leaders

Quick Reminders #InvestInEachOther

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What went well?

- Our team appreciated transparency + continuous flow of information
- We created many opportunities (repeat, reinforce, restate) to engage with information and ask questions
- Sharing different kinds of information in different ways for the team to digest

What did we learn?

- Importance of shared information in real time - even when we don't know the answers.
- Benefits of talking about the stuff that people are thinking - but may be afraid to ask. Helps to control the back channels and misinformation across the organization.
- We need to trust one another
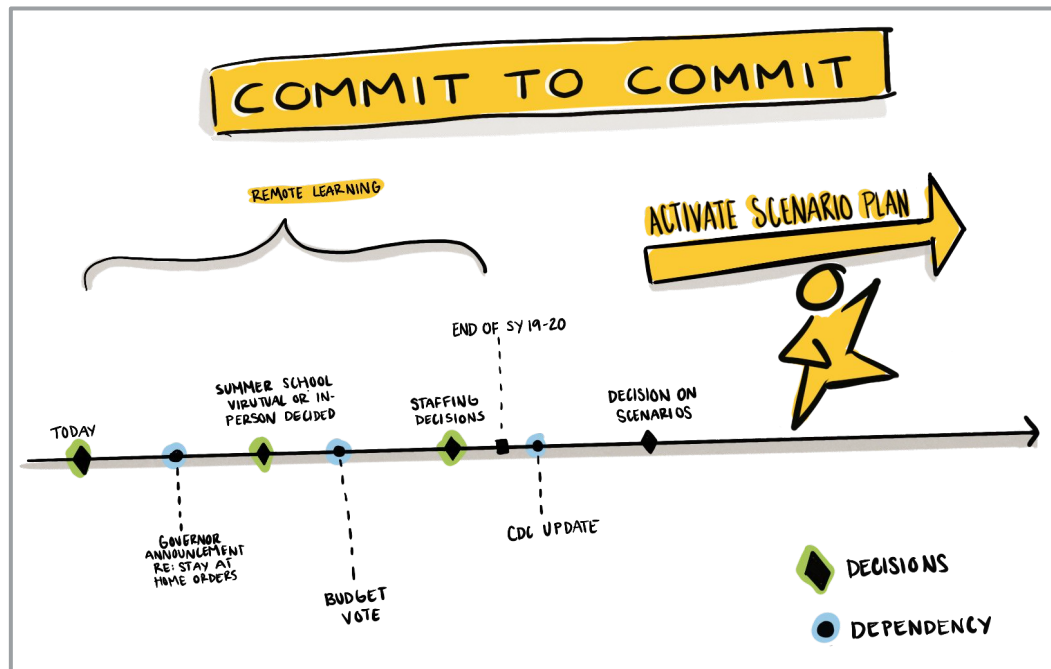
How is it reshaping us?
Market Research Team

🔖 **In the News Update:** Week of May 4th, 2020 (due Wed evening)

Andreea	Kim	Megan	Natalie
Ed Tech/Consulting More organizations are looking to provide reopening guidance. AEI released a six-section blueprint they co-authored with education leaders across the country (sections: school operations, whole child supports, school personnel, academics, distance learning, and general considerations). Equity is coming to the forefront of some plans. In Getting Smart's 10-Point Plan, equity is addressed with each point. WestEd has created a webinar series on how to strategically use resources (e.g., CARES Act funding) to mitigate the impact of COVID-19 on the most in need and vulnerable students. In related news, the American Federation of Teachers shared "A Plan to Safely Reopen America's Schools and Communities," UNICEF released a	**Follow the Money** We are starting to see money come in for some states and will need to keep an eye out for insights into allocations. Some examples: VDOE has outlined potential uses for funding and district allotments with their Continuity for Learning Task Force and Return to Schooling Recovery Task Force. There is a database for CA districts with funding totals but no insight into how it's being used. Louisiana plans to focus $51M on minority-serving schools. Blended learning is coming up in budget talks. Austin is looking at putting $22M toward BL tech. San Diego is considering shifting to BL, Boston schools have developed a plan that shifts to a blended	**Trauma Informed/SEL** As schools look toward reopening, attention to SEL and community building made Getting Smart's list of 10 things districts should be considering as they prepare for 2020-2021. Blueprints for school reopening call for needs assessments of student and faculty/staff needs. Illness, isolation, and economic uncertainty together with learning lost due to school closures might exacerbate depression and domestic violence, so schools should incorporate SEL for students and adults in their plans for re-opening. **Hybrid Models** Blueprints for school reopening detail the things schools need to consider: utilizing	**Emerging Leaders** **District Reopening Strategies** As a COVID-19 vaccine's release date remains uncertain, health officials are encouraging district leaders to prepare for an atypical school year in 2020-2020, and possibly into the 2021-2022 SY. In Alabama, the superintendent released a tentative timeline for phased reentry this week, with Phase 1 beginning in June 2020 - children 13 and older may return to campuses for sports practices. Younger students could begin returning for literacy campus in July. In Vietnam, schools have reopened after three months. All students must wear masks, students' temperatures are scanned as they enter school, and

Market Research Team Dashboard ☆ 🎓 Education Elements   👥 Team Visible   NH KS   Invite

Key Documents ···
- Internal Notes Document
- + Add another card

COVID-19 Research Zone ···
- PIVOT w/ COVID Plan
- FOCUS AREA: Reentry / Return Planning   💬 3 📎 14
- FOCUS AREA: EdTech
- FOCUS AREA: Trauma & Grief/Equity   📎 3
- FOCUS AREA: Other Countries' Response to COVID-19
- FOCUS AREA: Emerging Leaders   ≡ 📎 1
- FOCUS AREA: Economic Impact   💬 3
- FOCUS AREA: Funding Sources ('Follow the Money')   💬 2 📎 2
- Board Requests 4/29   🔔 1 👁 ≡ 💬 4 📎 5   KS NH
- How are schools reopening after coronavirus lockdowns? | World Economic Forum   📎 1

Surveys & Tools ···
- Insight Catcher   📎 1
- + Add another card

Archived Documents ···
- Research Challenge (March – April 2019)
- + Add another card

How is it reshaping us?
Commit to Commit Timeline

Information Sharing

Is there a message you have avoided communicating?

If so, why?
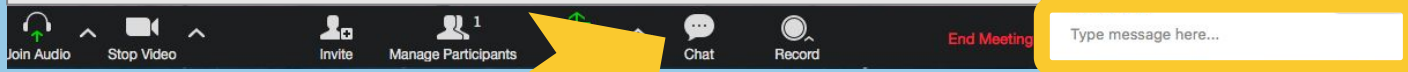
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Our Agenda

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What is a Retrospective?

Our EE Retrospective

- Teaming
- Information Sharing
- **Decision Making**

How you can do this too

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How did we respond?
What decisions do we need to make? What do we value?

Our People

How do we maintain our team + avoid laying off any EE team members?

Our Company

How will we ensure we are able to survive the grounding period?

Our Clients

How will we continue serve our clients and deliver promised work?

How did we respond?
Started with a Pulse Check

Our People

How are you doing? What do you need from us?

Are you engaging with your client partners?

Our Company

What did we commit to deliver in the next 90 days?

How can we deliver the work virtually? And update our processes to support that?

Our Clients

Initial plans to respond to COVID-19?

How can we continue to support you?

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Decision Making

How did we respond?
Pulse Check

Based on the survey results, we identified ways to check in on specific individuals for continued support.

How are ya fEEling?

* Required

We think folks might be generally fall into these three buckets of feelings and would love to learn about your current state, knowing it can change, so that we can provide support across the company. And we'd love to hear about any other feelings- please share below! *

☐ I'm mostly feeling okay- making some adjustments but generally have a sense of where to spend my time and how to work

☐ I'm feeling pretty confused about what to prioritize and how to spend my time and would love some guidance

☐ I'm feeling pretty overwhelmed personally and/or professionally and would love some individual support

☐ Other:

What else should we know about how you're feeling or what you need from EE at this time?

Your answer

Education Elements

How did we respond?
Real-Time with Clients

Decision Making

Current DI Project Crosswalk

File Edit View Insert Format Data Tools Add-ons Help   All changes saved in Drive

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Project

	Project	State	DI Team Project Team	Type of Project	Week of 2/3	Week of 2/10	Week of 2/17	Week of 2/24	Week of 3/2	Week of 3/9	Week of 3/16	Week of 3/23	Week of 3/30	Week of 4/6	Week of 4/13	Week of 4/20	Week of 4/27	Week of 5/4
197		MN	Jill									Onsite							
	AASA	CA	Kelly and Natalie W																
	ACSD	NC	Jill																
	AP Retreat	VA	AP																
	Arkansas PLA	AR	Jill, Simma and Noah																
	Atlanta ISD (TX)	TX	Cristina, Courtney	MIZ	Onsite														
	Bandera TX	TX	Drew and Keara			Onsite													
	Bibb	GA	Courtney, Daniel, Beth	Large Scale PL			Onsite		Onsite	Onsite				Onsite	Onsite	Onsite		Onsite
	Broward	FL	JDL, Drea, Courtney	Large Scale PL	Onsite					Onsite								
	Charleston	SC	Megan C and Purvi				Onsite	Onsite						Onsite				
	Compass Rose - MIZ	TX	Kim	Single PL				Onsite				Onsite						
	Dallas	TX	Maggie, Keara, Lauren, Purvi, Gabby, Baltazar			Onsite	Onsite		Onsite	Onsite					Onsite		Onsite
	Dundee	NY	Dana																
	E2 Road Show (NY)	NY	Dana																
	Edgewood	TX	Maggie, Maria				Onsite					Onsite	Onsite				Onsite
	Fairbanks	AK	Drew			Onsite	Onsite					Onsite					

+   Data Update ▾   DI Onsite Schedule Until Summit ▾   Resource Tab ▾   LinkedIn Resources ▾   Formula Sheet 1 ▾   ◀ ▶   Explore

Education Elements

How did we respond?
Real-Time with Clients

Decision Making

Current DI Project Crosswalk

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Virtual and Postponed

	Closure dates *(leave blank if n/a)*	Project Team	Type of Project	Communication Status	Level of Impact	Project Status	Plan for Postponed/ Cancelled Project	Deliverable/Delivery Week of 3/16	Deliverable/ Delivery Week of 3/23	Deliverable/Delivery Week of 3/30
Brooks Academies		Crystal	Personalize Learning	Yes	No Impact	Virtual	all work to be done by 4/30	none	none	none
Broward	3/16-4/15	Courtney, Drea	Personalize Learning	Yes	Impacted	Virtual and Postponed	Coaches meeting will likely be virtual. May LW and Reflect+Iterate workshop likely postponed to Sept. (TBD)	Coaches Mtg (postponed, TBD virtual or in-person)	None	None
Cave Creek	schools physcially closed until end of school year (by AZ governor)	Drew	Personalize Learning	Yes	No Impact	None	Holding monthly support calls as scoped	None	None	Virtual Meeting (scoped)
Charleston	3/16-3/31	Megan, Purvi	Innovative Leadership	Yes	Impacted	Virtual	Shifting in-person strategy sessions to virtual Virtual coaching calls with schools Talked on 3/24. Wants to wait and see where things	None	None	None

Project Status and Resources ▾   Data Update ▾   DI Onsite Schedule Until Summit ▾   Resource Tab ▾   LinkedIn Resou

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How did we respond?
Real-Time with Clients

Decision Making

Current Client Project Status

Projects	Week of									
	3/9	3/16	3/23	3/30	4/6	4/13	4/20	4/28	5/7	5/12
Highly impacted	8	10	11	10	9	6	6	8	8	6
No impact	32	33	27	27	27	27	27	28	28	30
Requesting Additional Time	7	10	10	5	3	3	2	2	2	2
Postponed/cancelled onsites	7	9	9	6	6	6	5	4	4	4
Shifting to virtual	21 (31%)	25 (37%)	26 (39%)	38 (57%)	40 (60%)	41 (61%)	42 (63%)	43 (66%)	43 (66%)	44 (67%)

What went well?

- Organized around a few, highest leverage questions. Rapidly built a structure (and rebuilt) to capture the data
- Guided practice on how to answer questions + input data

What did we learn?

- Information comes in phases, we needed to be fluid in how we asked questions and captured the data
- Not every client was ready to talk at the same time - geographically, size, type of project, leadership qualities.
- One size won't fit all captured resources and tools to share options with clients

How is it reshaping us?
Immediate Needs through Webinars + Repurposing Work

Decision Making

Internal Guidance → *External Leadership*

Internal Guidance Document

COVID-19 - Guidelines for DI Team client communication and delivery

The purpose of this document is to provide guidance to the DI team on how to communicate with clients about COVID-19, and options for modified delivery.

This document is meant as a supplement to our overall company policy, which can be found here.

This is an internal document only - do not share outside EE.

Table of Contents
- Decision Guidance
- Communication Guidance
- Suggested Ideas for Revamping or Repurposing Work
- EE Thought Leadership

Decision Guidance

What should I know about my client(s) and their COVID-19 policies to inform my decisions?
All consultants should be aware of any policy changes at the client site and should understand the client's decision-making process and timeline. Consultants should confirm with clients that they are still comfortable with us coming to them with some onsite modifications (no shared supplies, etc - see company COVID-19 guidelines).

On-Demand Webinars

EDUCATING THROUGH COVID-19:
Addressing The Widespread Impact of Coronavirus on Schools

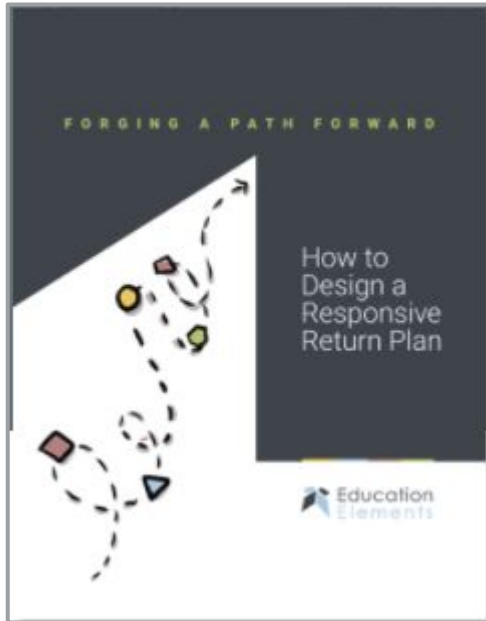**LEADERSHIP:**
- How COVID-19 has Exposed Education in-Equities, Panel Discussion hosted by Association of Latino Administrators and Superintendents
- Focusing on What is Important to Students Right Now by Jaime Casap & David Hardy
- Leading Through Uncertainty - Sharing Information
- Leading Through Uncertainty: Decision-Making
- Leading Through Uncertainty: Planning for Change, Not Perfection
- Building Innovative Structures Within Distance Learning Constraints
- Equity and School Closings
- Trauma-Informed Leadership

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How is it reshaping us?
Adjust our services as we plan for the future
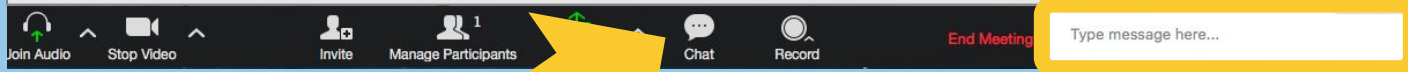
Our list of services will change...

Student-Centered Learning	Leadership Development and Capacity Building	District Strategy
Personalized Learning	Organizational Leadership	State-Wide Initiative & Consortia
Competency-Based Education	Innovative Leadership Competencies	Innovation Zones
Instructional Model Design	Teams and Culture	Strategic Planning & Refresh
Learning Walks	Teacher Retention	Initiative Alignment
Personalized Learning Benchmark		Curriculum Adoption
About our PL Methodology		

FORGING A PATH FORWARD

How to Design a Responsive Return Plan

Education Elements

Education Elements

Our Agenda

Living out Responsive Planning

What is a Retrospective?

Our EE Retrospective

- Teaming

- Information Sharing

- Decision Making
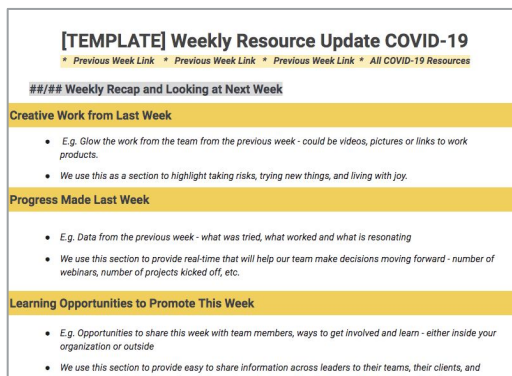
How you can do this too

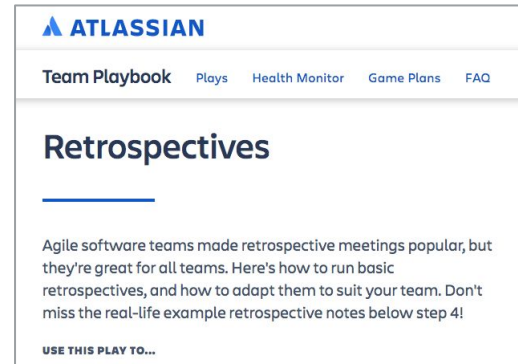# Here are some resources to continue on your own path -

LEARN

Read this blog post for self-inquiry [3 Ways to Tell You Lead](#) **...**

PRACTICE

Create a message sharing document, like our [Weekly Info Roundup](#)

LEAD

Use [our slides](#) **+ this** [protocol](#) **to lead your own retrospective**

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