FORGING A PATH FORWARD



How to Design a Responsive Return Plan



RETURNING REIMAGINING REVAMPING

"In preparing for battle, I have always found that plans are useless, but planning is indispensable."

President Dwight D. Eisenhower

In a time of unprecedented change when conditions are ever-evolving and ambiguous, responsiveness doesn't just become more important; it becomes THE strategy for organizations to endure and thrive. Districts, schools, and education agencies will need to consider three concurrent streams of work (adapted from McKinsey's <u>Path to the</u> <u>Next Normal</u>) as they plan for School Year 2020-2021:

RETURNING: Determine multiple paths for a return in SY 2020-2021, with the expressed intent to address the needs of all students.

REIMAGINING: Rethink the way learning and teaching are designed so that the entire district community can thrive.

REVAMPING: Build agile and responsive practices to support all students and families in a time of crisis.



This guide presents the Education Elements philosophy on how to use responsive practices to plan your district's return and provides a four-step process for examining multiple return scenarios given considerable uncertainty and unknowns.

CONTEXT What We Learned

Through the pandemic, we learned more about digital transformation in learning in a matter of weeks than we had over the last 10 years. The focus of many education organizations was rapid transformation. Education leaders grappled with how quickly in-school operations could be shifted to at-home or distance learning. In most cases, district leaders' goals were not to augment or transform teaching, but rather to change the method of delivery to virtual. Leaders tried new paths to personalize support for students and families who relied on buildings, programs, and most importantly, staff to access learning.

Most cycles of crisis management start with short-term responses and migrate to longerterm planning. In the first weeks of responding to the impacts of COVID-19, most leaders were focused on meeting immediate needs: device distribution, meal delivery, and regular communication. With return planning primed to begin, leaders are now able to take the time and space to re-imagine operations and rethink the status quo. The closures and disruptions caused by COVID-19 have underscored that equity is not something to be addressed "at some point." Ensuring that all students have the support they need to be successful is the most important thing we can do now. Addressing issues of equity requires structural changes to the way we teach, learn, grade, train teachers, engage with families, etc. Changes that are opportunities for SY 20-21.



What We Know

Based on the requirements shared at the federal, state, and local levels, districts and schools may be asked to rethink everything from physical space to learning structures. The table below displays examples of how districts might employ different strategies and tactics to safeguard the health and wellness of their communities.

| SAMPLE LEVER | EXAMPLE TACTICS TO ACCOMMODATE | |
|--|--|--|
| Limit Contact (Students + Teachers) | Reduce class sizes Adjust lunch protocols Stagger start and end times of the day Stagger days of attendance Intermittent closings Eliminate assemblies Eliminate sports Limit or eliminate bus services | |
| Extend Learning Options | Summer extensions Learning day extensions Weekend options Remote learning options Trimester or year-round scheduling | |
| Enforce Safety Precautions | Protective equipment (e.g. masks, gloves) Temperature checks Hand-washing Frequent sanitization + cleaning Limits on attendees at family events | |
| Individualized Student Supports | In school mental health and trauma support Significant remediation Wraparound services | |

Many of the tactics suggested are short-term solutions; they are adaptations for a traditionally inflexible education system. Our perspective is that districts and schools must choose tactics to meet your community's health and safety requirements; what works for one district may not work for another.

Schools will reopen, and there is no option to return to "business as normal." Our communities have faced unprecedented trauma resulting from direct impact, loss, and economic instability resulting from COVID-19. We know that the inequities that already existed in schools have been given a national spotlight. The long-term response to and return from this crisis will demand something new from leaders to meet this challenge.

What Is Possible

We have always believed that the first step to building a school or district strategic plan that uplifts all students is to understand that at their core, school districts have historically been designed to uplift some, not all. Grounding ourselves in this painful, if not common, reality allows us to build plans that change the narrative around universal student achievement, and design new systems aimed at creating opportunities for achievement for all. Only then can we ensure students attend schools that can meet their needs and potential.

Through this crisis, we have witnessed school districts, teachers, and students rapidly adapt to change. Barriers that prevented innovation such as testing, scheduling, and even physical environments have been suspended, and in their place comes possibility. We can make the choice to bring these learnings and experiences with us as we return to school. This time period is an opportunity to actively choose what you return to and what you will change.

KEY PERSPECTIVE

Our work is grounded in providing personalized learning for all. To that end, we are defining key terms to clarify our perspective.

EDUCATIONAL EQUITY:

Providing the necessary opportunities to all by ensuring that each student has the right resources to reach their individual potential.

PERSONALIZED LEARNING:

Personalized learning calls on educators to "[tailor] learning for each student's strengths, needs and interests—including enabling student voice and choice in what, how, when and where they learn—to provide flexibility and supports to ensure mastery of the highest standards possible." (Aurora Institute). At its core, personalized learning centers around the learner; ensuring lessons are relevant, accessible, and ultimately build student ownership. Education Elements published "The Core 4 Elements of Personalized Learning" to name the most common instructional changes that teachers and teams implement when they personalize learning for students.

In our work, we have seen the value of responsive leadership and structures that uphold the needs of all. Responsiveness in teaming, planning, decision-making, and communication serve as guidelines for creating more agile and fluid organizations, and we see examples of this with districts that have adopted their own responsive practices through our partnership. Our <u>Annual Report</u> highlights the experiences and resulting outcomes of schools, districts, and states as they incorporated responsive principles into their everyday operations.

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WHAT IS RESPONSIVE PLANNING?

At Education Elements, we believe the school districts and organizations that thrive year to year treat planning as a process that is more valuable than the plan itself. WHO you engage and HOW you engage people says more about your values than your plan ever will. Therefore, your plan should reflect a clear purpose, direction, and strategy while also creating opportunities for feedback and pivots.



According to Eric Ries, entrepreneur and author of The Lean Startup, a 'pivot' is a change in strategy without a change in direction. Companies and organizations that endure and succeed through significant change are those that adapt accordingly without losing their north star or core mission and beliefs. A case we use to illustrate this is that of the Netflix and Blockbuster business models of the early 2000s. While Blockbuster held the market for at-home movie rentals, Netflix began to test out different models that aligned to the same vision of providing convenient, home entertainment–first with mailing DVDs in the late 1990s, and as the needs of their consumers changed, with on-demand streaming by 2007. The pivots Netflix tested and implemented led to their success and Blockbuster's fall, but they also give us a valuable lesson in responsive planning. The organizations that succeed are the ones willing to plan for change and pivot as external conditions shift without losing their overall strategic direction. In the bestselling book, *The New School Rules*, by Anthony Kim and Alexis Gonzales-Black, this guiding principle is called <u>Planning</u> for Change, Not Perfection.

RESPONSIVE PLANNING IN THE AGE OF COVID-19

"The only thing that is certain is uncertainty."

Alicia Keys

Traditional systems of communication are built for traditional conditions. With information changing rapidly during times of crisis, it is impractical to believe that our systems, as they currently exist, can be responsive to every need that arises. In times of crisis, new information comes frequently, sometimes by the hour. Such rapid shifts require rapid iteration. Teams that are not equipped with processes and habits that allow for that iteration will have a steeper learning curve than teams seasoned with responsive practices.



The New School Rules:

What is it + Why is it important in times of crisis?



It's been said that character is what you do when no one is looking, but in times of crisis, true character is what you do when pressure is applied. An organization's character is no different, and *The New School Rules (NSR)* gives us insight into what a responsive organization's character is made of. The 6 rules are:

- 1) Planning for Change, Not Perfection
- 2) Build Trust and Allow Authority to Spread
- 3) Define the Work Before You Define the People
- 4) Aim for "Safe Enough to Try" Versus Consensus
- 5) Harness the Flow and Let Information Go
- 6) Schools Grow When People Grow

By using these rules as guiding principles when planning for a return to brick-and-mortar teaching and learning, schools and districts can stay true to their goals and overall mission, without getting bottlenecked by consensus, misinformation, or employee burnout. These rules are especially relevant in times of intense change and essential for organizations to consider when planning their return.

The New Team Habits: What is it + Why is it important in times of crisis?



While NSR gives us the philosophy behind the guidelines for responsive leadership and culture, it's important to consider the actionable practices that leaders can engage in because of these rules. Leaders, particularly in times of crisis, understand why new practices and dynamic shifts matter, but they can struggle to build buy-in, transfer knowledge to others, and make changes that are the right size—big enough to make an impact, but not so big as to overwhelm themselves or their teams. Leaders and their communities might solely focus on the goal when they should additionally focus on the small habits and practices that get them closer and closer to that goal.

Written by Kim, Keara Mascareñaz, and Kawai Lai, *The New Team Habits* is a companion guide to begin implementing these responsive practices at the team level, that introduces us to a framework for HOW to make these shifts. The framework, known as the SEPAD Method, is a step-by-step guide for introducing and adopting new team habits. When planning for a school or district's return, these five steps will help to build buy-in, create inspiration, and expand a school district's knowledge and opportunities to practice and test new habits to make lasting change.

Innovative Leadership Competencies:

What is it + Why is it important in times of crisis?



COVID-19 has tested people and organizations in an unprecedented way. We have had to dramatically modify the way we work while experiencing chronic personal, economic, and health-related stressors. These circumstances underscore the key traits of effective leaders to guide teams through uncertainty, adversity, and rapid change. While there are many attributes of successful leaders, with additional variation depending on their role, these 6 core leadership competencies are critical in driving effective leadership for individuals, regardless of their role or perceived sphere of influence within an organization.

ABOUT THIS SERIES:

We have compiled the topics we know are top of mind for our district partners. We have aligned the topics to the NSR rule you can leverage, the habit you use to practice it, and the most important disposition(s) you will need to employ as a leader.



Planning For School Opening



Accepting ambiguity can be challenging for those of us who prefer to live in the world of certainty. We do not know the path this crisis will take us on next week, let alone this summer or fall. Through acknowledging our own limitations, we set the expectation that we will be planning with uncertainty and adding in cycles for iteration to pivot as we learn new information.

WHO TO INCLUDE?

Pull together a team of experts from across your district who are willing to embrace ambiguity, lead with optimism, and have creative confidence to design new solutions. This planning also offers an opportunity to engage with stakeholders outside of your circle, learn more about family, student, and staff perspectives, experiences, needs, and expectations through surveys, interviews and/or observations.. <u>Watch</u> Andrea share ways to meaningfully involve your community in this effort.

STEP 1

IDENTIFY KNOWNS AND UNKNOWNS

Getting comfortable with, and distinguishing between, what we know (facts), what we're expecting (assumptions), and what we think (opinions) will help as we plan in the midst of uncertainty. We recommend that each team starts by developing lists of knowns and unknowns to guide planning. This exercise will allow the team to articulate and consider how we test facts, assumptions, and opinions through scenario planning and prototyping.

Facts: what we know

Assumptions: what we're expecting

Opinions: what we think

example

| Knowns: | Known Unknowns: | Unknown Unknowns: |
|---|--|---|
| Students will learn Digital literacy for teachers and students is no longer optional Students have experienced extreme disruption Students still need to receive services rendered by the school (special education, meals, etc) Staff is working with competing at-home priorities | What day we will open our school buildings If we have the right platforms to deliver asynchronous learning How to effectively conduct virtual kindergarten | We don't fill this out but let's leave it here to symbolize that we need to always be ready for things to change! |

BUILD SCENARIOS



STEP

Due to the high number of known unknowns (not to mention unknown unknowns), there are countless realities that districts can imagine for the return to school and the operations of the School Year 2020-2021. Below we have simplified this uncertainty by highlighting three possible realities for planning purposes. These are intended to orient your team to different and equally important scenarios that will uncover how this year will be different from a typical school year while identifying what may need to change to accommodate new needs.

| SCENARIO 1 | SCENARIO 2 | SCENARIO 3 |
|---|---|--|
| e.g. School opens with no contact limiting | e.g. In school with social distancing and safety precautions | e.g. Not in school, with distance learning |
| Focus on the impact (needs and gaps) of remote learning during spring 2020 on students, staff, and community. | Support teaching and learning within the school building for the majority of students. | Support teaching and learning remotely for the majority of students. Consider how distance learning will need to evolve. |

You might use these three common scenarios to start or develop your own scenarios based on the set of knowns and unknowns specific to your context. Rest assured, these are suggestions; there are no "correct" scenarios. Once you develop the initial scenarios, you can practice creating combinations and variations.

If there is one thing that all school districts do each year, it is prepare for the start of a new school year. Year after year, lockers are assigned, rosters are created, and bus routes scheduled. Interestingly, many of these routines and procedures go smoothly not because of standard operating procedures but because of institutional knowledge. With such a dramatic change in conditions, some districts are finding it helpful to create a **Scenario 0**. In this scenario, leaders can brainstorm all of the activities that would go into motion as a typical new school year begins. Outlining the routines and procedures of a standard year can help you to clarify your considerations when adjusting for the scenarios outlined above.

How can we define 'how to win'?

A strategy is a series of imperfect choices that we make with unknown information. That being said, we can make our best guess by building out the scenarios. You must plan, in the most general sense, for all of them so that you can narrow your focus to one when your known unknowns become knowns.

"There is no single, clear and pervasive definition of strategy and even less consensus on how to build one. When it succeeds it' seems a little like magic: Unknowable and unexplainable in advance but obvious in retrospect. It isn't. Really, strategy is about making specific choices to win in the marketplace."

A.G. Lafley and Roger L. Martin, *Playing To Win*

Winning in this sense means succeeding in the new normal SY 20-21 will create. It is crucial to use this time to live in what is possible. Possibility begets creativity and creativity leads to transformational change. Determining how you 'win' is completely dependent on your context, but generally planning for all scenarios helps to prioritize your efforts and resources.

Leaders are using this as an opportunity to create a common definition of success for their teams and communities. This is the time to choose a common philosophy and set of values that uphold your organization's and team's commitment to **equity** by designing a system that works for all students, rather than some. You can do that by deepening your understanding of the unique needs and challenges of your most vulnerable students and their families through their experiences within each of these scenarios. It is critical at this stage to intentionally plan to support all students through the transition, not just some.

Key questions that will inform "how to win" include:

What does success look like? How will you address the needs of all of your subgroups?

What might we need to reimagine? (systems or operations) Which stakeholders are impacted and how?

What will be standard across our community vs. school-led?

How can we test out this scenario quickly and learn?

To catapult yourself into the future and uncover the nuances within your scenario, we recommend building out scenarios in a way that feels authentic to your team and to your community. Remember that we are planning for change over perfection at this stage. We recognize that more information will become certain and your team will continue to learn, so the idea of perfection will only lead to delayed decision-making. Here are some ideas from the Education Elements team for how to gather more data:

- Empathize with stakeholders to learn more about their experiences in Spring 2020 while capturing their needs from their teachers, school, and programs as we prepare for SY 2020-2021. Here's a <u>persona canvas</u> we've leveraged. You can also pull some ideas from our <u>Stakeholder Engagement Guide</u> (created pre COVID19).
- Ideate and brainstorm virtually through shared documents, creating separate Scenario Canvases.
- Prototype scenario plans to quickly get ideas on paper in different formats.

Once you've captured more data about the scenarios and needs of stakeholders, we recommend that your team examines the scenarios side by side. Here's an example:

| | SCENARIO 1 | SCENARIO 2 | SCENARIO 3 |
|---|--|--|---|
| | e.g. School opens with no contact limiting | e.g. In school with social distancing and safety precautions | e.g. Not in school, with distance learning |
| SAMPLE | Focus on the impact (needs and gaps) of remote learning during spring 2020 on students, staff and community. | Supports teaching and learning within the school building for the majority of students. | Supports teaching and learning remotely for the majority of students. Consider how distance learning will need to evolve. |
| Upgrade Network Capabilities | No need to upgrade | We will have students in school for days and as a result will need to teach other virtually. Network upgrade crucial | We will need to provide reliable internet to students and staff. Network considerations unavoidable. |
| Transportation Services | No change | Routes adjusted to accommodate social distancing and flexible schedules | Transportation overhaul if students are not attending brick-and-mortar school |
| Distributing Lunch | No change | New lunch schedule, provide lunches for virtual learners | Provide meals to all students in need. |
| Professional Development | PD for differentiation and remediation due to learning loss | Support for differentiation and virtual learning, Move to combination of virtual and in-person PD | Support for differentiation and virtual learning, virtual PD. |
| Student Transitions (lunch, beginning of day, etc) | No change | Signs and markers for 6 ft distancing. | No change |



RECOGNIZE CONSISTENCIES AND PRIORITIZE

As you complete the previous exercise, you will begin to notice **big rocks** - the topics that need to be addressed in most or all of the possible scenarios. These "big rocks" represent key processes and areas to tackle, redesign, and create for the next school year. The next step is to group your rocks according to three different factors that will help when trying to determine what to initiate now, who to involve, and how to begin. Below we offer indicators for Impact, Ease, and Urgency, recognizing that your situation



may require additional considerations. We encourage you to develop indicators that meet your needs. To learn more about prioritizing, check out our <u>Prioritization Guide</u>.

IMPACT

We recommend first looking at which factors are being elevated across multiple scenario canvases, as this is an indicator that significant design or redesign may be necessary regardless of which scenario ends up playing out. You may adjust these criteria to include other factors such as strategic alignment, student impact, flexibility, and return on investment.

Equity Focus Lens: Our impact range falls from broad to targeted, meaning that no quadrant on our matrix represents low impact. Targeted impact highlights that the factor may be more impactful to some stakeholders or certain subgroups. **This is okay.** Equity is not about giving everyone the same thing but giving everyone what they need. Do not be deterred by a rock that falls into "targeted" impact.

Equity Focus Questions: Who are you considering when you identify a rock as having "broad impact" What rocks in your "targeted" impact section might have a profound impact on a subgroup of stakeholders?

| BROAD IMPACT Present in all scenarios | Present in 2 or more more scenarios | TARGETED IMPACT Present in only one scenario |
|---|---|--|
| Deploying 1 : 1 devices Vpgrade network capabilities | Transportation Services Distributing Lunch Professional Development | |
| We know we have to contend with this no matter what. | We know this is likely and therefore top of mind. | We can wait to address this later, when we have clarity on which scenario feels most likely. |

EASE

Some of these rocks will be variations of existing systems and structures, while other rocks will require new processes and systems of support. We recommend identifying which rocks will be easier to tackle and which ones will need time for a team to form and designs to be created. This thought exercise will help you to uncover feasibility, risk, and resource availability. You may choose to adjust these factors to include other ease criteria, such as cost and current staff capacity.

Equity Focus Lens: Remember, it has taken years to create our systems and it will take a great deal of work to dismantle inequitable systems. Do not be hesitant to accurately identify a rock as having higher difficulty if you recognize that it will require a departure from existing systems that benefit the few.

Equity Focus Question: Do the items that seem easier lead to recreating inequitable systems and processes?

| HIGHER EASE We have a team that is responsible for doing this AND we have done this before | We have a team that is responsible for doing this OR we have done this before | HIGHER DIFFICULTY We don't have a team and we've never done this before |
|--|--|---|
| Distributing Lunch Vpgrade Network Capabilities | Deploying 1 : 1 Devices Transportation Services | Professional Development |
| We know who is going to do it, how to get it done, and we are ready to start. | We've figured this out before and we can do it again. | We will need to pull a team together for the first time to tackle this new challenge. |



URGENCY

We are adding another layer of complexity into how we prioritize-urgency. A simple online search will tell you urgency is "**importance requiring swift action.**" In the middle of a crisis, everything feels urgent so we need to cut through the noise. Truly determining what is urgent requires that we add an additional layer to what we know and don't know. When determining urgency we consider 2 factors. Dependency: information needed to make a final decision

'Commit by' timeline: We need to know when the decisions must be made so that we can commit to deciding during this timeline.]

Equity Focus Lens: Many decisions were made quickly and swift actions were taken to address emergent needs in this crisis, such as standing up meal delivery programs and deploying devices to students. Leaders acted on imperfect information and designed stopgap measures that now need to be expanded, formalized, or sustained through staffing and funding.

Equity Focus Question: How can you connect with your stakeholders to ensure you have the most up to date information on what is urgent to them?

| Rocks | Dependency | Commit by |
|-------------------------|---|-----------|
| Deploying 1:1 Devices | Budget adjustments | ASAP |
| Upgrading Network | Legal consultation and budget adjustments | May 30 |
| Distributing Lunch | Personnel | May 5 |
| Transportation Services | School closure decision | June 1 |
| Virtual Teacher PD | New school year | September |

How to prioritize using a 2x2 matrix

Start by drawing a two by two with "Impact" on the Y axis and "Ease" on the X axis. Your base matrix should resemble this one:



We recommend starting with the items present in all scenarios, moving from broad impact through targeted impact. Take a look at this <u>blog post</u> which provides guidance on how to plot each of your rocks. Once you have plotted your rocks, your matrix will start to be populated like this one:



We can now add in the layer of urgency–either by numbering the order of the items or indicating by size which ones are most important to address first.



STEP 4

COMMUNICATE

When a rock is identified for redesign, you are likely expecting to increase effort to adjust a process or structure that has existed in your organization for a long time. Many of these big rocks represent departments, teams, and leaders who have built deep knowledge and expertise in these areas. Be cognizant of the impact of swift change on the individuals who have taken great pride in this work, and when possible, involve them in the problemsolving process.

If you are reading this guide, you are likely a leader carrying a great deal of responsibility for the people in your charge. This does not mean that you have to do this alone. Leadership and ingenuity have emerged in your community and within your ranks. We encourage you to lean on those who are stepping up amidst so much ambiguity. Consider augmenting your inner core of problem-solvers with some of these new leaders. First, their perspectives and experiences can contribute to your understanding of all the needs across your community. Second, you likely have previously untapped potential that lies dormant in your organization. What a great time to activate it! We recommend clarifying roles and providing guidance by creating parameters. An exercise like Make Space for Mistakes by the Wiseman Group can help you release some control and benefit from the knowledge of the collective.

A Note On Gratitude

Everyone is doing the best they can in these challenging times. It is important to remind ourselves that the need to act is essential but the need to care for others is paramount. As a leader in your community, model grace and gratitude knowing that these decisions have varying implications for your students, parents, and employees. A small expression of appreciation for their efforts may be the motivation to keep going.

Commit to Commit

Your team and your community will ask questions and make requests for certainty that are just not possible at this time. Even so, clear communication is still a powerful tool for trust-building and buy-in. Decisions regarding when to return to schools, how to reopen schools, and whether to extend remote learning will not be simple to clarify within a specific amount of time. To combat the anxiety of uncertainty, we recommend developing a high-level timeline of key milestones in your planning process to share with stakeholders. This is different from a project timeline—the purpose of this timeline is to articulate dependencies while managing the expectations from others on what information will be shared and when.



When a request surfaces and you do not know the answer yet, one practice to try is "Commit to Commit." This is an upgrade on the common, "I'll get back to you." When you do not have the necessary inputs or knowledge to answer a question, make a promise or agree to a request–commit to following up by a certain date. The commitment will provide clarity to the requestor on when they will receive a reply, while also providing you with a known amount of time to gather the necessary information. Without this, the requestor may make assumptions of their own or feel unsupported, unheard, or unseen.

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Gabrielle Hewitt is an Associate Partner at Education Elements who leads work with small and large districts across the country to impact student growth and success. Gabby has been a classroom teacher, team leader, and district manager for new teachers. Over the last decade, she has cultivated expertise in adult professional development. She supports district leaders in utilizing The NEW School Rules and The NEW Team Habits to make their teams and districts more responsive.

> This is Part One of our Forging a Path Forward Series. Upcoming installments will address specific priorities you might consider as you plan for a return to physical schools. We will utilize the steps outlined in Part One to organize our thinking so we encourage you to work through a few of these exercises with your teams to identify your scenarios and big rocks.

