Transitioning to the

"Next Normal"

May 2020

➢ Introduce a tool to help prepare you for a post-corona virus return to school

➢ Learn how this tool can be applied in any situation whatever your role is in education

Please feel free to introduce yourselves in the Chat box

Michael W. Curran-Hays
Executive Director of TregoED

TregoED:

Is a non-profit, educational consulting company headquartered in Princeton, NJ. We have been in business for 25+ years and have worked with over 850 school districts in the United States and Canada. We work with school boards, school district leadership and teachers using collaborative decision making, problem solving, and risk management tools and strategies.

Polling Question:

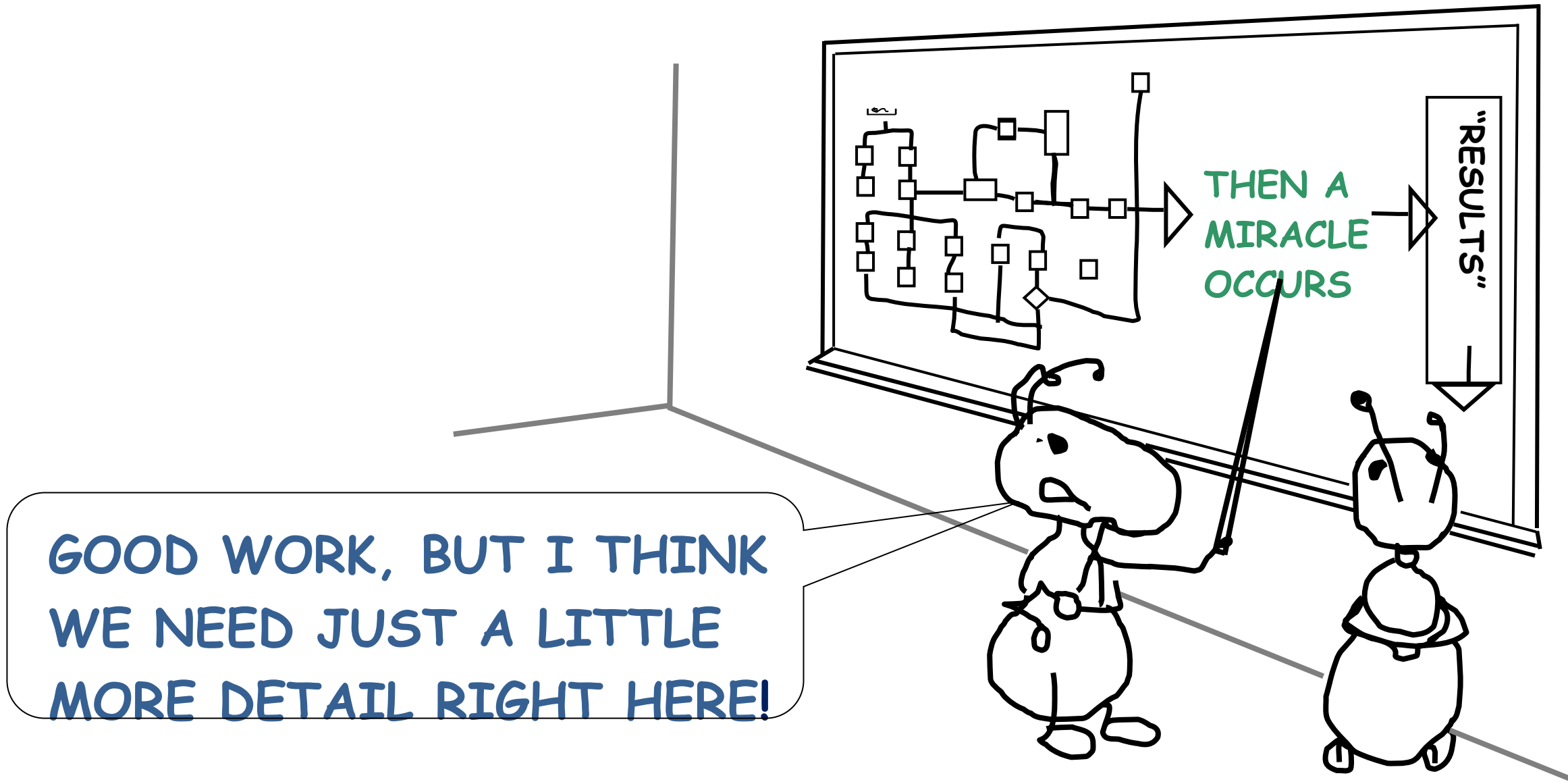**Which key area are you experiencing as most challenging right now?**

6
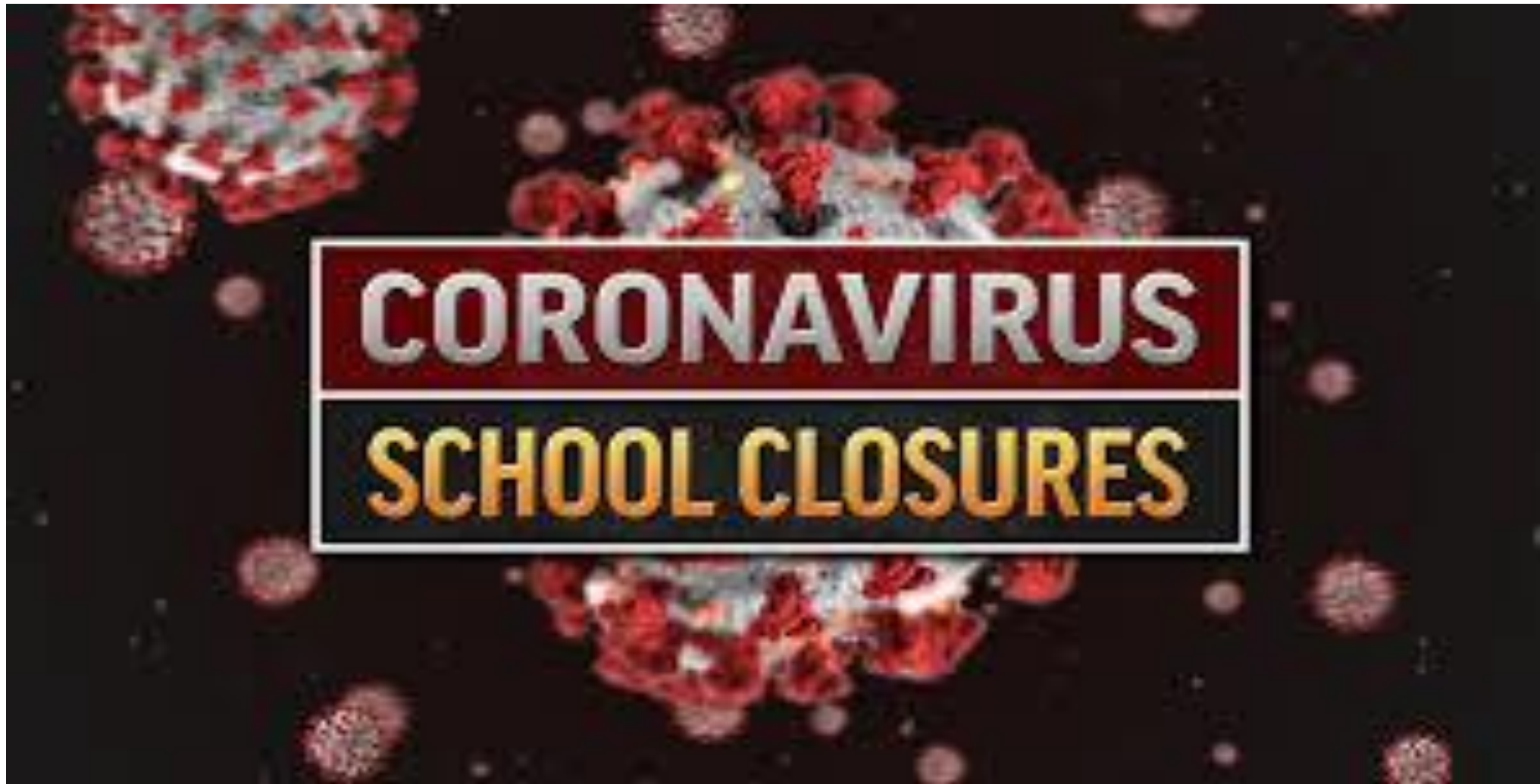
➢ Getting and using good data

➢ Identification and prioritization of existing needs

➢ Plan for how to deal with existing and emerging needs

➢ Collaboration with stakeholders to implement plans

➢ Consistent, frequent, accurate communication

➢ A systematic approach that uses all of the above

What's going on?

Need to better understand complex situations
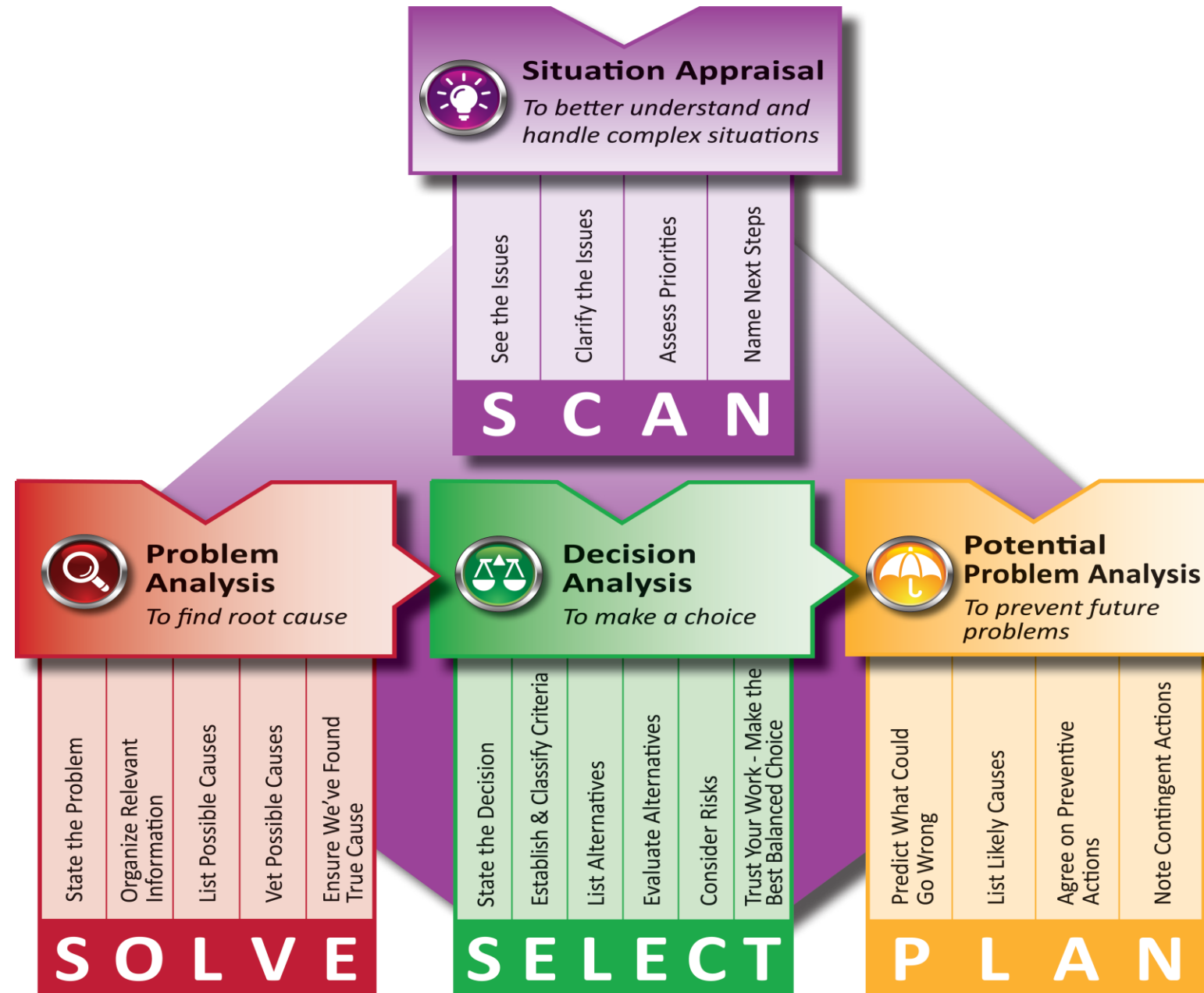
What's gone wrong?

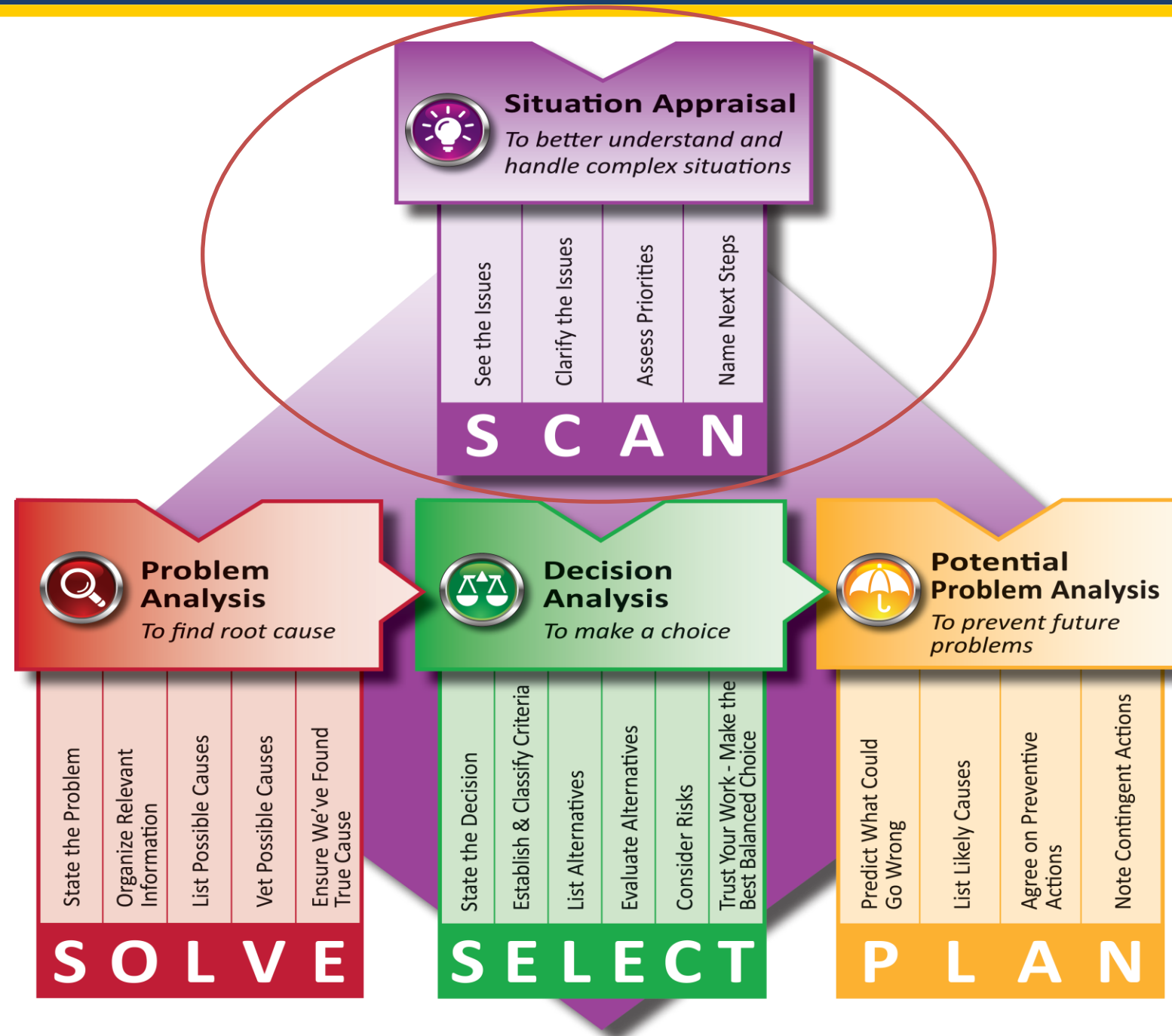*Need to find root cause when things go off course*

What course of action should we take?

Need to choose best among several options

What lies ahead?

Need to protect good decisions by preventing problems

Situation Appraisal

➢ **What:** A systematic process which helps us better understand and address complex situations and issues

➢ **Why:** To break complex situations into manageable pieces so they can be effectively addressed

➢ **Typical Users:** Teachers, Principals, Cabinets and School Boards

➢ **Key Steps:**   **S**ee the Issues

                                    Clarify the Issues

                                    Assess Priorities

                                    Name Next Steps

S – See the Issues

State the situation: xxxxxxxxxxxxx

What situation do we want to examine?
What seems to be important about this situation?

C – Clarify the Issues

What do you mean by...?

A – Assess Priorities

What is the seriousness of each issue?
What is its urgency?
What is the potential growth (trend)?

Identify the Issues	Clarify the Issues	Assess Priorities		
		Seriousness (H, M, L)	Urgency (H, M, L)	Growth (H, M, L)

N – Name Next Steps

What needs to be done next? By whom? By when?

Actions Needed	By Whom	By When

S – See the Issues

➢ **Why:** To better understand what we are dealing with

➢ **How:**

1) State the situation
   - *Ask:* What situation do we want to examine?

2) Identify the issues
   - *Ask:* What seems to be important about this situation?

   List quickly—don't critique....brainstorm them

Example—Shifting to virtual PLC/Department/District Meetings

Identify the Issues

Example—Shifting to virtual PLC/Department/ District Meetings

Identify the Issues
Attendance/Attention
User Fatigue/Anxiety
Technology Concerns
Training/Support
Confidentiality
Maintaining Professionalism
Communication

Example—Shifting to virtual PLC/Department/District Meetings

Identify the Issues
Attendance/Attention
User Fatigue/Anxiety
Technology Concerns
Training/Support
Confidentiality
Maintaining Professionalism
Communication

Clarify the Issues

Identify the Issues	Clarify the Issues	Assess Priorities

C – Clarify the Issues

➢ **Why:** To break big issues into manageable pieces

➢ **How:**

– *Ask:* What do you mean by…?

Be specific

Example—Shifting to Virtual PLC/Dept/District Meetings

Identify the Issues	Clarify the Issues
User Fatigue/ Anxiety	• Virtual meetings (Zoom/Google Hangouts, etc.) require different levels of focus and attention • Participants may struggle to juggle several virtual meetings a day effectively and maintain focus and energy • What will be the impact of the loss/distorted non-verbal cues in conducting meetings? • How will staff handle the increased pressure to be "on" and "responsive" all the time? • Large video conferences may be intimidating to some staff • Are we replacing what would normally have been a phone call or email with virtual meetings? • Some staff may be over scheduled into meetings (itinerant staff/admin, etc.)

S – See the Issues

State the situation: xxxxxxxxxxxxxx

What situation do we want to examine?
What seems to be important about this situation?

C – Clarify the Issues

What do you mean by…?

A – Assess Priorities

What is the seriousness of each issue?
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Identify the Issues	Clarify the Issues	Assess Priorities		
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N – Name Next Steps

What needs to be done next? By whom? By when?

Actions Needed	By Whom	By When

Assess Priorities

➤ What issues are most important or critical?

Identify the Issues	Clarify the Issues	Assess Priorities

A – **Assess Priorities**

➢ **Why:** To identify what to work on first

   To be more objective in setting priorities

➢ **How:** For each issue, *ask*:

   – What are the most important issues to address first?

Example—Shifting to Virtual PLC/Dept/District Meetings

Identify the Issues	Clarify the Issues	Assess Priorities
User Fatigue/ Anxiety	• Participants may struggle to juggle several virtual meetings a day effectively and maintain focus and energy	H
	• How will staff handle the increased pressure to be "on" and "responsive" all the time?	H
	• Large video conferences may be intimidating to some staff	M
	• Are we replacing what would normally have been a phone call or email with virtual meetings?	L
	• Some staff may be over scheduled into meetings (itinerant staff/admin, etc.)	H

Name Next Steps

➢ What needs to be done to address each issue?

➢ Who should be responsible?

➢ By when should these steps be completed

Actions Needed	By Whom	By When

N – Name Next Steps – "The Action Plan"

➢ **Why:** To determine what needs to be done next

➢ **How:** For each actionable issue, *ask*:

  – What needs to be done next? By whom? By when?

  – What decisions do we need to make?

  – What's gone wrong and we don't know why?

  – What changes or plans do we have to implement?

  Be specific

Example—Shifting to Virtual PLC/Dept/District Meetings

Actions Needed	By Whom	By When
Create schedule of protected PLC/Dept/District meeting times to avoid over-scheduling	Teacher Leads/School Admin/District Admin	March 18
Share best practices guidance for virtual meetings with all staff	District Leads/School Admin	March 23
Develop virtual meeting protocols that encourage small group interactions	Teacher Leads/School Admin/District Admin	March 20
Develop survey to take a "temperature read" on meeting concerns on regular basis- adjust as needed.	District Leads/School Admin	April 10 and ongoing
Develop collaborative calendar for scheduling virtual meetings	School Admin/District Leads	March 18

S – See the Issues

State the situation: xxxxxxxxxxxxxx

What situation do we want to examine?
What seems to be important about this situation?

C – Clarify the Issues

What do you mean by…?

A – Assess Priorities

What is the seriousness of each issue?
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Identify the Issues	Clarify the Issues	Assess Priorities		
		Seriousness (H, M, L)	Urgency (H, M, L)	Growth (H, M, L)

N – Name Next Steps

What needs to be done next? By whom? By when?

Actions Needed	By Whom	By When

Application—

How can you apply this tool to your "Next Normal"?

See the Issues
- What issues need to be considered?

Clarify the Issues
- What is important about these issues? What concerns us?

Assess Priorities
- Which issues are most important or critical?

Name Next Steps
- What needs to be done to address each issue? Who should be responsible? By when should these steps be completed?

See the Issues

➢ What issues do you need to consider as you prepare for your students to return?

See the Issues—*Example*

➢ What issues do you need to consider as we prepare for students to return?

Identify the Issues
Staffing Issues
Special education
New safety and hygiene protocols
Equitable grading and promotion practices
Summer School
Credit Recovery
Student and staff mental health
Communication—internal and external
Union contracts
Budget priorities

Clarify the Issues

Identify the Issues	Clarify the Issues	Assess Priorities

See the Issues—*Example*

➢ What issues do you need to consider as we prepare for students to return?

Identify the Issues
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Budget priorities

Clarify the Issues

➢ What is important about these issues?

➢ What concerns you about these issues?

➢ Which one is the most important issue?

Clarify the Issues—Example

Identify the Issues	Clarify the Issues
Staffing Issues	What staff issues do we need to address? How to fill positions if we lose staff? Staff mental health issues - Is current Employee Assistance program adequate? How to staff extended summer school, school days or year? How to work within union contract and do what's needed for teaching and learning? What do we do about notification of next year's teacher assignments? How do we get PPE for staff?

Assess Priorities

➤ What issues are most important or critical?

Identify the Issues	Clarify the Issues	Assess Priorities

Assess Priorities

➢ Which issues are most important or critical?

➢ Why?

Assess Priorities—Example

Identify the Issues	Clarify the Issues	Assess Priorities
Staffing Issues	What staff issues do we need to address?	*Most Important*
	How to fill positions if we lose staff	H
	Staff mental health issues - Is current Employee Assistance program adequate?	H
		M
	How to staff extended summer school, school days or year?	
	How to work within union contract and do what's needed for teaching and learning?	H
		L
	What do we do about notification of next year's teacher assignments?	L
		H
	How do we get PPE for Staff?	

Name Next Steps

➢ What needs to be done to address each issue?

➢ Who should be responsible?

➢ By when should these steps be completed

Actions Needed	By Whom	By When

Name Next Steps

➢ What needs to be done to address each issue?

➢ Who should be responsible?

➢ By when should these steps be completed?

Name Next Steps—Example

| Actions Needed	Who	By When
Virtual meetings to identify staff issues and concerns (use SA!)	School leadership, HR, Dept. Leadership	End of this week
Communicate what will be done to address high-priority issues	Same	End of next week
Work with union leadership to determine areas of flexibility regarding staffing issues and PPE requirements	Union leaders, Head district negotiators (HR, etc.)	June 8
Delay teacher notification of next year's teaching assignment pending agreement with teacher association	HR, Principals	July 14

Why Use Situation Appraisal / SCAN

➢ Better understand a complex situation with multiple components and stakeholders

➢ Get started on planning for complex situation, assignment, or project

➢ Diffuse heated situation by surfacing and addressing perspectives of stakeholders

➢ Get peoples' reaction to proposed solution or course of action

➢ Address continuous improvement of what's currently in place

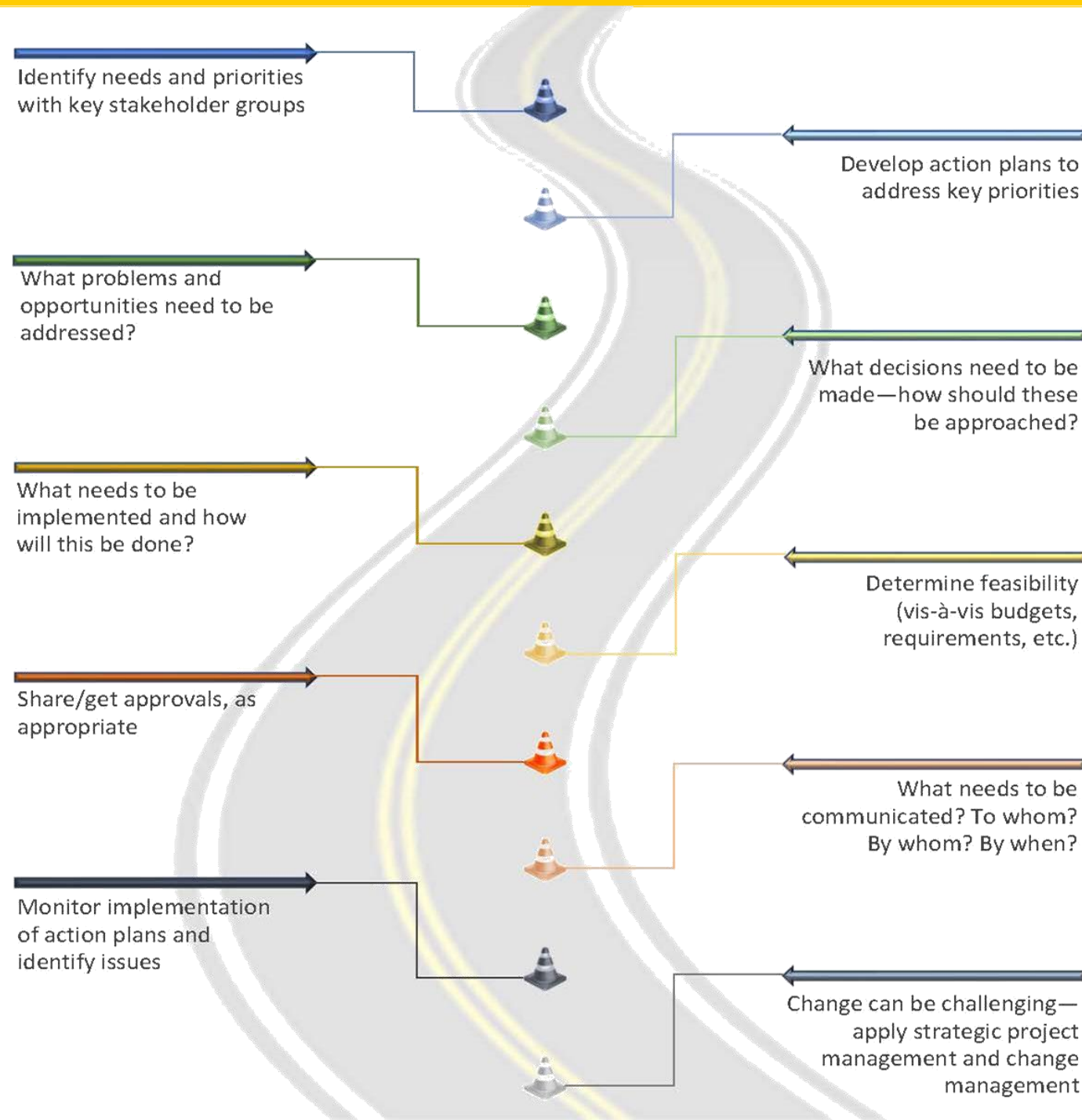# When would you Use Situation Appraisal / SCAN

> ???
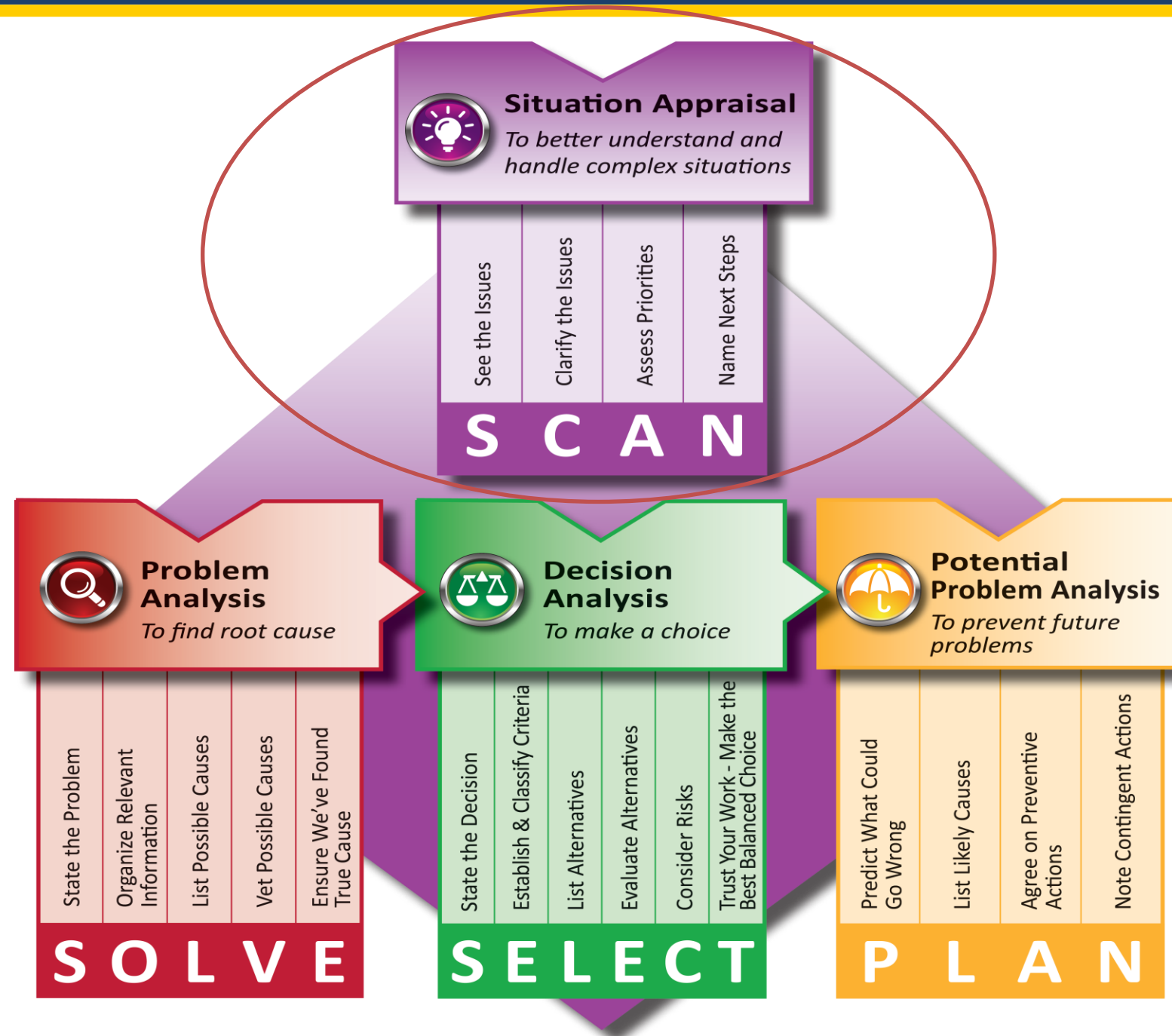
Tips to Make using SCAN Easier

➢ Have a road map – A visual of the journey ahead

➢ Before you start your SCAN – Plan your approach

➢ Buckets – Similar Issues

➢ Examples – Current Clients

Identify needs and priorities with key stakeholder groups

Develop action plans to address key priorities

What problems and opportunities need to be addressed?

What decisions need to be made—how should these be approached?

What needs to be implemented and how will this be done?

Determine feasibility (vis-à-vis budgets, requirements, etc.)

Share/get approvals, as appropriate

What needs to be communicated? To whom? By whom? By when?

Monitor implementation of action plans and identify issues

Change can be challenging—apply strategic project management and change management

Before you "See the Issues" – Plan for a SCAN

➢ What issues do you need to consider as you prepare for your students to return?

- Who should be involved?
- Who are the SMEs (Subject Matter Experts) who should be involved?
- What are the big buckets of similar issues?
- Do you want work groups?
- Who will facilitate the work groups?
- Who will coordinate and assimilate the work groups output?
- Do you need a strategic master project plan?

Framing "See the Issues" – Big Buckets

➢ What issues do you need to consider as you prepare for your students to return?

– TregoED Suggestions

- "Academics"
- "Distance Learning"
- "School Personnel"
- "School Operations"
- "Whole Child Supports"

See the Issues – Example of Consulting Support

➢ What issues do you need to consider as you prepare for your students to return?

– "School Re-Start Advisory Council"

- "Teaching and Learning"
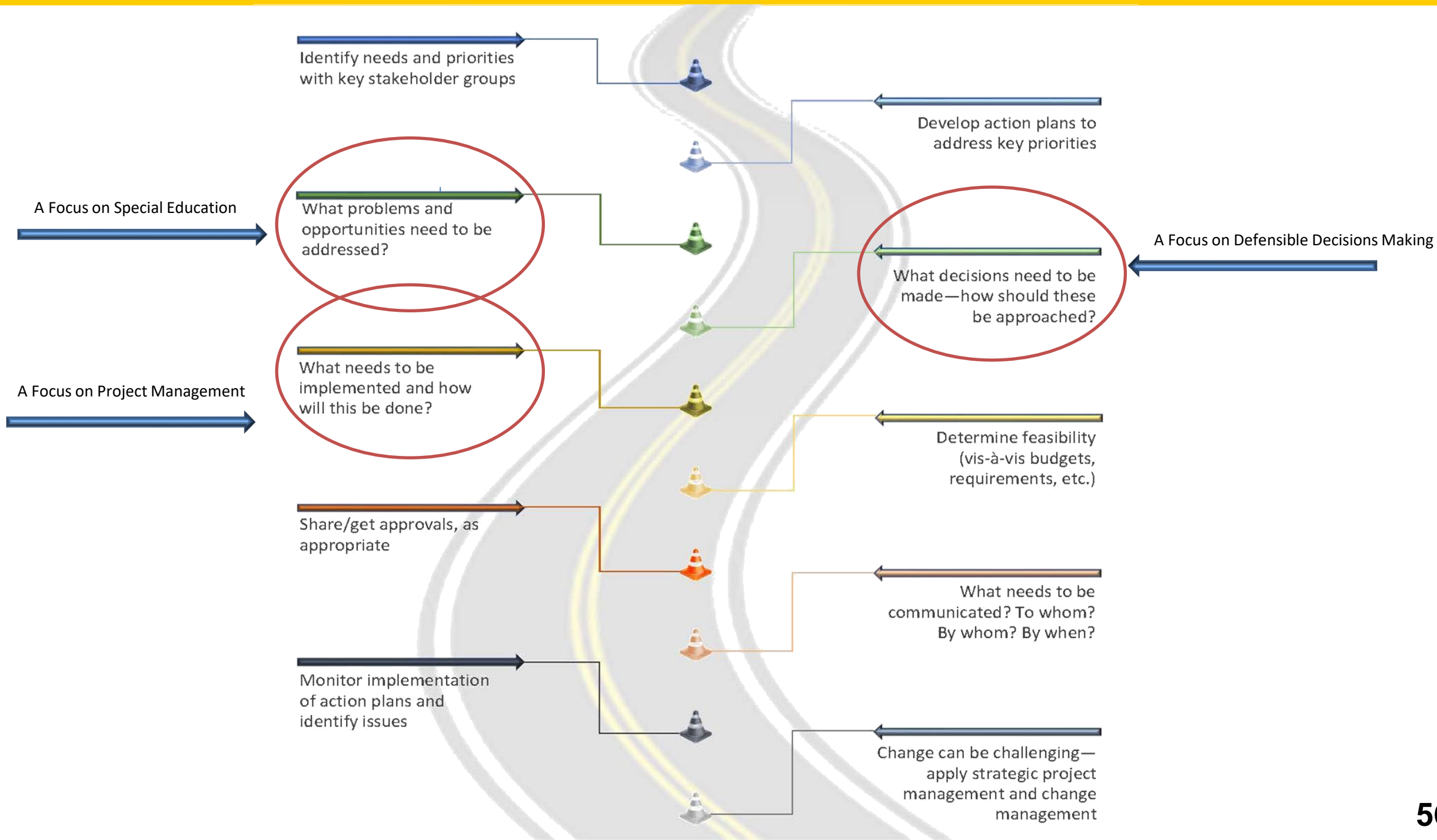- "Health and Well-being"
- "School Logistics"

See the Issues – Example of Facilitation Lead Support

➢ What issues do you need to consider as you prepare for your students to return?

  – "COVID-19 Re-entry Items"

    • "Elementary"

    • "Middle School"

    • "High School"
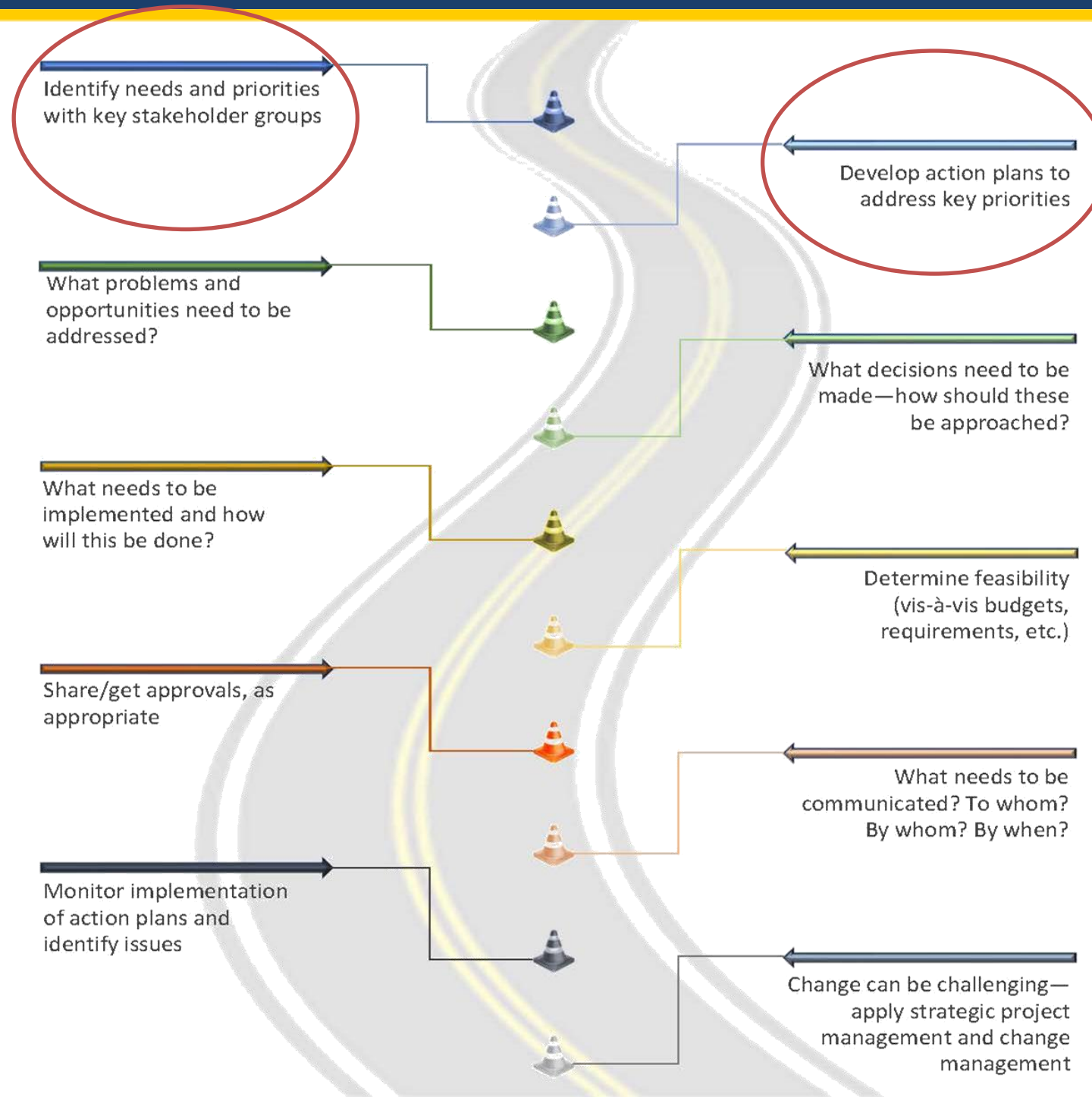
➢ We will send you the PowerPoint presentation

➢ We will send you the SCAN template

➢ Please take a look at our website. There is lots of information that you will find very helpful as you work through this crisis

➢ We are offering free coaching on using SCAN & the template

➢ We are also offering pro bono consulting to help you start your re – entry thinking and planning……..just contact me.

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