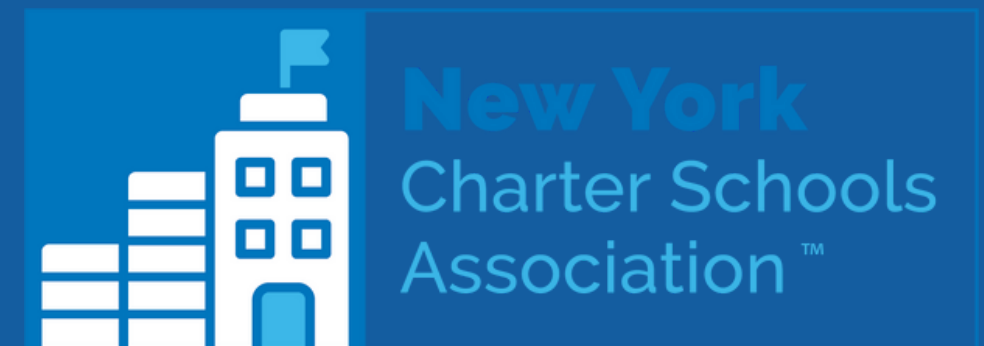# The COVID Operations Reboot: Sharing Strategies for Operational Resilience During Challenging Times.

Operations Working Group

February 18th, 2022

New York Charter Schools Association™

Objective

School Leaders will explore ways to improve operations by addressing systemic breaks and upgrading personnel management techniques.

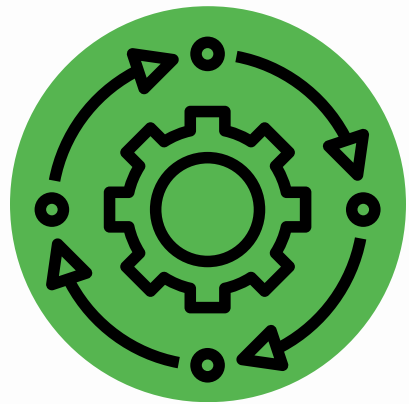Question for you...

Calm & Stable Operations

Simple systems staff actually follow

Employee accountability

Systems

- The base of all operations
- Practical
- Adaptable
- Simple
- Checks and balances

"That's how we have always done it"

Reflection

Take some time to reflect on the systems at your school

Answer the reflection questions on your handout

Example

Principal is being hounded by vendors asking about payment status.

Current Process Steps

Office Manager receives invoices in the mail

Current Process Steps

Office Manager receives invoices in the mail

Office Manager mails invoices to accountant

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Accountant contacts Principal for invoice approval

Example Principal is being hounded by vendors asking about payment status.

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Office Manager receives invoices in the mail

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Accountant contacts Principal for invoice approval

Principal gets distracted - invoices are not approved on time

Accountant calls Office Manager to obtain approval

Office Manager reminds Principal to approve invoices

Example Principal is being hounded by vendors asking about payment status.

Current Process Steps

Principal approves invoices

Office Manager receives invoices in the mail

Office Manager mails invoices to accountant

Accountant contacts Principal for invoice approval

Principal gets distracted - invoices are not approved on time

Accountant calls Office Manager to obtain approval

Office Manager reminds Principal to approve invoices

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Current Process Steps

Principal approves invoices

Accountant pays invoices

Office Manager receives invoices in the mail

Office Manager mails invoices to accountant

Accountant contacts Principal for invoice approval

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Current Process Steps

Principal approves invoices

Accountant pays invoices

Office Manager receives invoices in the mail →

Principal receives call from vendors that did not get paid

Office Manager mails invoices to accountant

Accountant contacts Principal for invoice approval

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Current Process Steps

Principal approves invoices

Accountant pays invoices

Office Manager receives invoices in the mail

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Office Manager mails invoices to accountant

Principal asks Office Manager to look into unpaid invoices

Accountant contacts Principal for invoice approval

Principal gets distracted - invoices are not approved on time

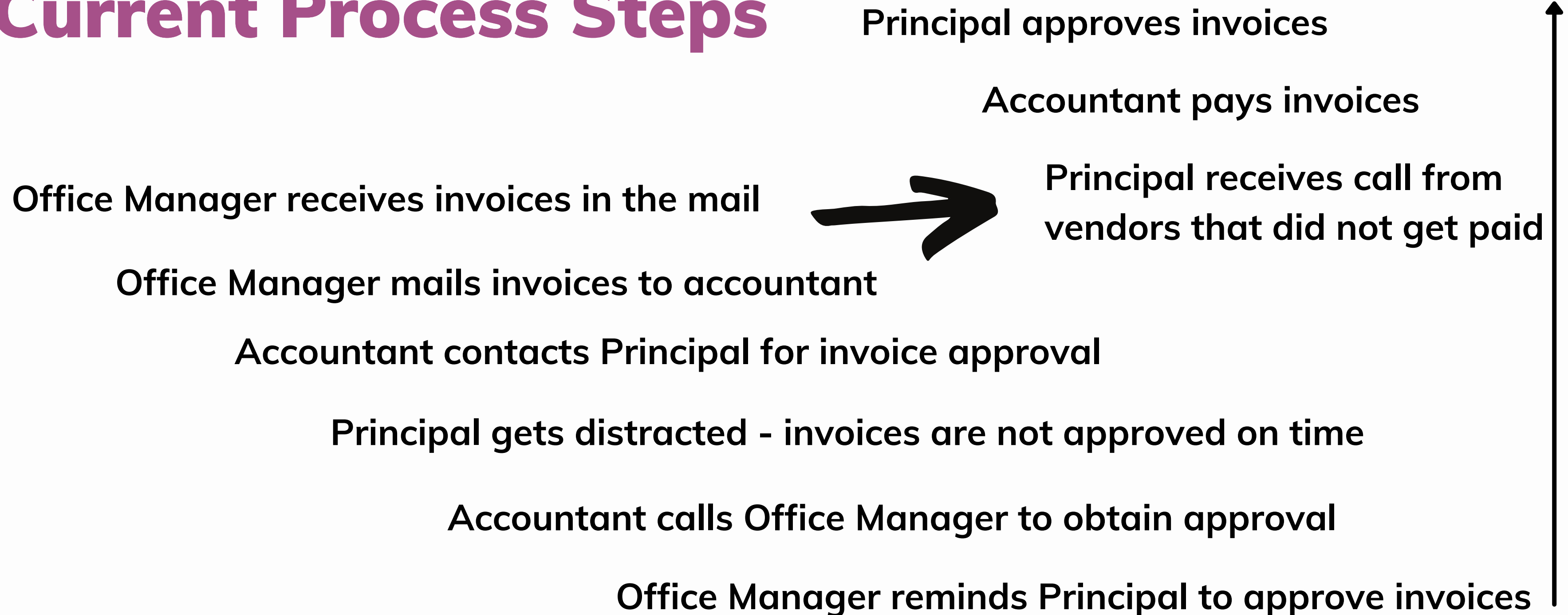Accountant calls Office Manager to obtain approval

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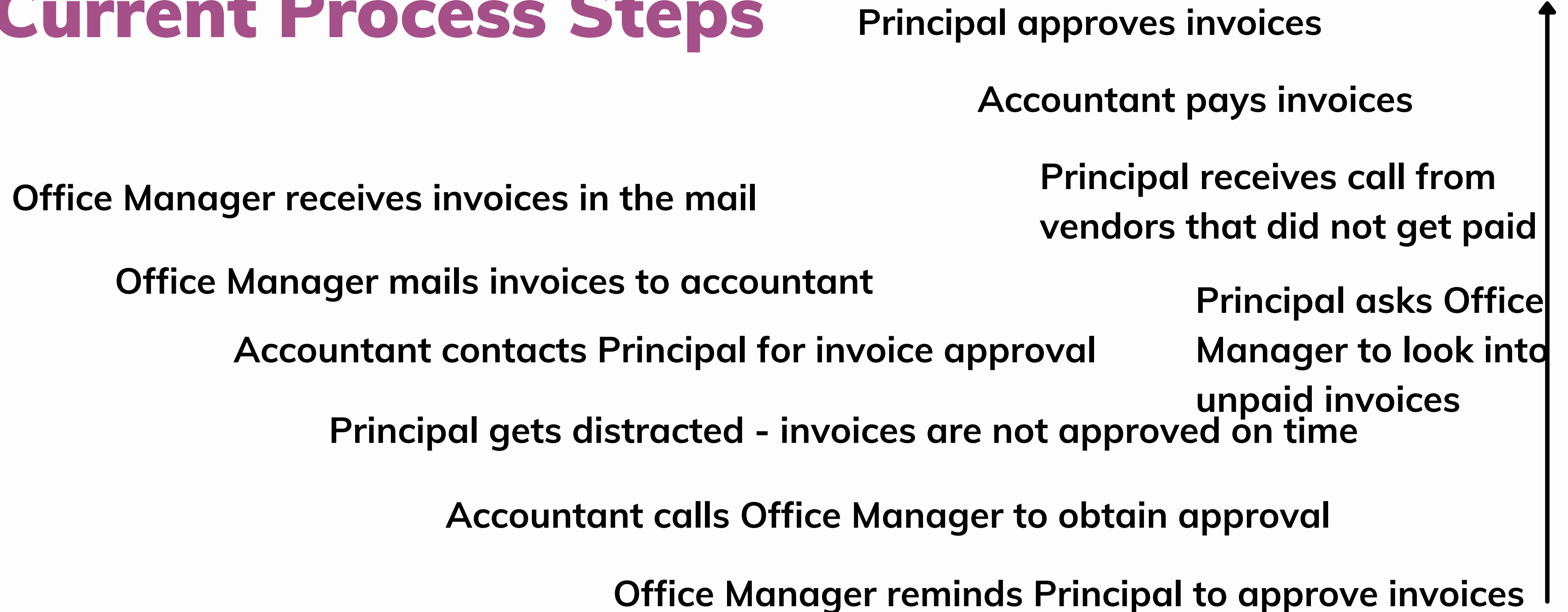
Current Process Steps

Principal approves invoices

Accountant pays invoices

Principal receives call from vendors that did not get paid

Office Manager receives invoices in the mail

Office Manager mails invoices to accountant

Principal asks Office Manager to look into unpaid invoices

Accountant contacts Principal for invoice approval

Office Manager contacts Accountant, but Accountant does not have invoices

Principal gets distracted - invoices are not approved on time

Accountant calls Office Manager to obtain approval

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Accountant calls Office Manager to obtain approval

Office Manager reminds Principal to approve invoices

Office Manager tracks down invoices

Example Principal is being hounded by vendors asking about payment status.

Current Process Steps

Principal approves invoices

Accountant pays invoices

Principal receives call from vendors that did not get paid

Office Manager receives invoices in the mail

Office Manager mails invoices to accountant

Principal asks Office Manager to look into unpaid invoices

Accountant contacts Principal for invoice approval

Office Manager contacts Accountant, but Accountant does not have invoices

Principal gets distracted - invoices are not approved on time

Accountant calls Office Manager to obtain approval

Office Manager reminds Principal to approve invoices

Office Manager tracks down invoices ⟶ Invoices go to Accountant

Example Principal is being hounded by vendors asking about payment status.

Current Process Steps

Principal approves invoices

Accountant pays missing invoices

Accountant pays invoices

Office Manager receives invoices in the mail

Principal receives call from vendors that did not get paid

Office Manager mails invoices to accountant

Principal asks Office Manager to look into unpaid invoices

Accountant contacts Principal for invoice approval

Office Manager contacts Accountant, but Accountant does not have invoices

Principal gets distracted - invoices are not approved on time

Accountant calls Office Manager to obtain approval

Office Manager reminds Principal to approve invoices

Office Manager tracks down invoices → Invoices go to Accountant

Principal is being hounded by vendors asking about payment status.

Current Process

What caused the system breakdown? Mark all that apply.

Lack of training	Lack of accountability	Lack of procedure to follow
✗ Overcomplicated procedure	✗ Outdated procedure	✗ Lack of proactivity
✗ Lack of ownership	Lack of practicality	Lack of buy-in

Example Principal is being hounded by vendors asking about payment status.

Current Process

How can you address the system breakdown?

- How can I simplify the process?

- What training is required?

- Who needs to be involved?

- How can we hold staff accountable?

- Is there a cost?

- What checks and balances can we put in place?
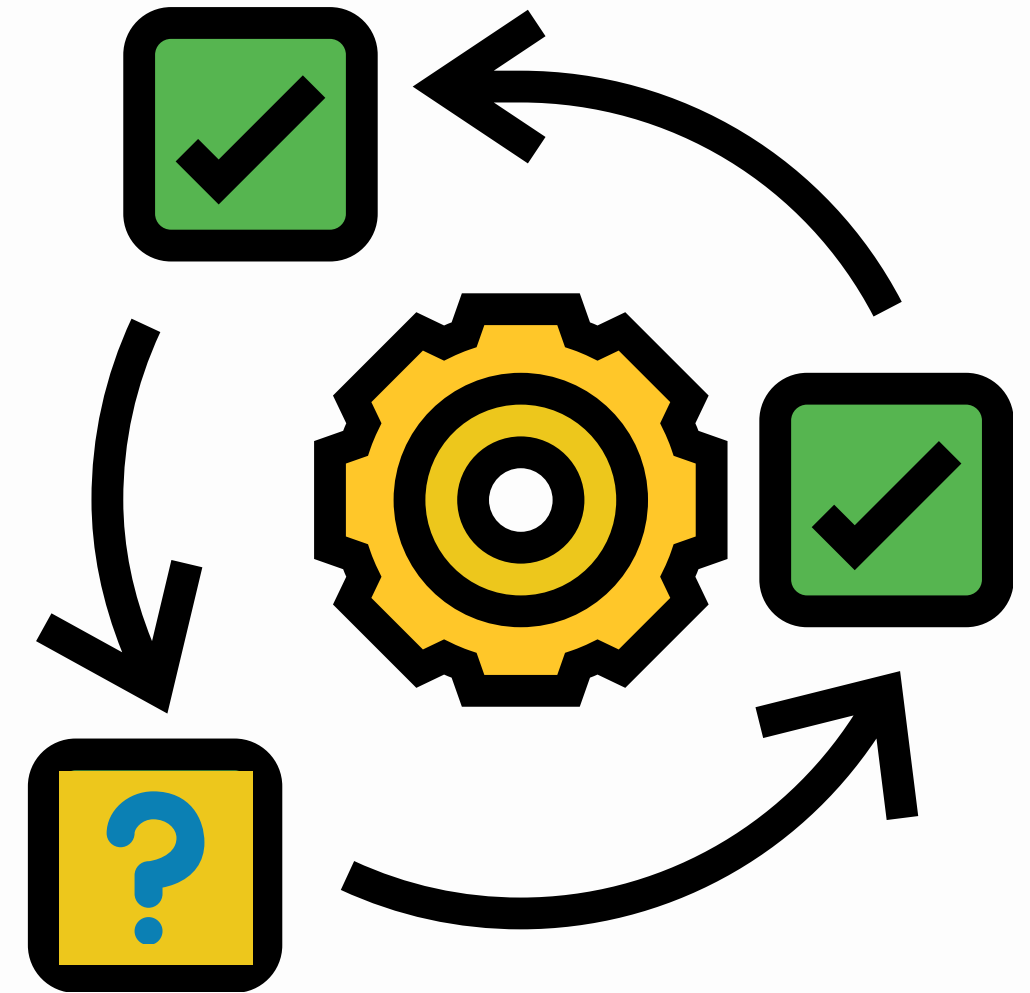
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2. The services and payment amounts are correct

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Accountant pays invoices

Example

Principal is being hounded by vendors asking about payment status.

System Intervention

- Invoices sent electrically so they don't get lost in the mail
- Office Manager owns process and proactively prevents problems
- Invoices are properly reviewed for accuracy by Office Manager and Principal (checks & balances)

Intervention- The Result?

No more frustrated vendor phone calls to the Principal!

Example Principal is being hounded by vendors asking about payment status.

System Intervention

Discuss some possible system interventions with your partner

Questions?

Comments?

Examples to share?

Employee Accountability

Instagram vs **Reality**

Expectation Setting

Instagram

Semi annual meetings with staff to discuss expectations and duties.

VS

Reality

Randomly assign tasks throughout the year because stuff has to get done.

Operations Staff Evaluations

Instagram

Reality

VS

Evaluate employees using unbiased metrics annually.

There is never time for evaluations so staff never get evaluated.

Proactivity

Instagram

Leadership strategically plans ahead for evolving school needs.

VS

Reality

Leadership scrambles to adapt to changing needs as they arise.

Employee Accountability

Set clear expectations

Hold staff accountable for those expectations

Who Owns What

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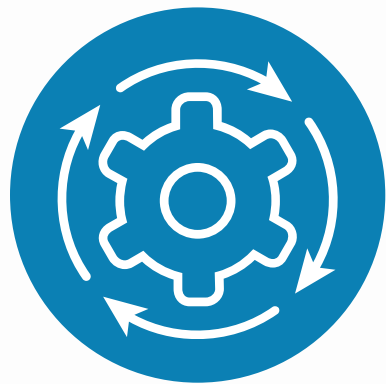6) Develop evaluation rubric based on new job descriptions.

Employee Accountability

System Maintenance

- Update job descriptions as part of pre-service
- Hold your self accountable

Thank You!

Thank You for Joining Us Today

- **Before you go, can you please complete our post-session survey. We will drop a link to the survey in the chat.**

- **We look forward to you joining us at our next Ops Working Group meeting on <u>March 18th at 10:00 am.</u>**

New York
Charter Schools
Association ™