



# Mapping Out Plans for the 2020-21 School Year: Key Steps and Considerations<sup>1</sup>

Debra P. Wilson

SAIS

Updated May 1, 2020

*This publication is a work in progress. Do you have policies, structures, or key questions and approaches that you are using at your school that you would be willing to share? Email Debra Wilson at [debra@saiss.org](mailto:debra@saiss.org).*

The COVID-19 pandemic has made planning for the year ahead a logistical mind bender for independent schools. The scope has felt too wide-ranging, the obstacles too high to scale. However, at this point, our industry has the benefit of more time on its side, so it's time to look ahead to longer-term planning. Parents and other community members are now looking for more insight into how the school might respond to the challenges at hand. And teachers will need more comprehensive guidance and support.

This publication, which brings together a number of resources provided by schools and industry experts, aims to help schools get started on mapping out plans for the 2020-21 school year.

## **Why Begin Planning Now?**

This spring, schools made the leap to emergency remote learning in a variety of ways. Some schools made the transition very quickly, while others had the luxury of slightly more time to think through methods and processes. In all cases, the transitions reflected an incredible undertaking; and in many cases they resulted in incredible outcomes. However, almost none of the remote learning models put in place were as effective as they would have been had schools had more time to plan.

The next challenge at hand for independent schools—that is, putting in place longer-term planning—is more difficult in some ways. Schools need to plan for the ambiguity of a variety of scenarios, including ones in which students may be on *and* off campus, entirely off campus, or all together one week and dispersed the next.

This academic year, schools benefited from quite a bit of good will from parents, who understood that everyone was sideswiped by this pandemic. This fall, however, families will be

---

<sup>1</sup> *This publication is provided for informational purposes only. It is not designed or intended to be used as or in place of legal or public health advice. Schools should work with their retained professionals when looking for specific advice.*

expecting better delivery on the promise of our schools, particularly if tuition holds steady. Further, staff members will need a more supportive structure to help them think about and deliver their work in a new medium with more focus, a better understanding of learning goals, and more professional support.

## **A Note about Liability**

This publication is not designed to delve deep into liability, but it is important for schools to understand the context within which they open. All schools always need to provide “reasonable” care to avoid liability. That standard of care is set by what is being done around us, but also what the reasonable standards are for the times. As always, basic standards of care are not fundamental best practices]; the health and safety of any community are enormous concerns for schools. Schools are run, first and foremost, by the caring staff who guide our students every day. Their health is fundamental to healthy operations of the school. Parent concerns for health and safety are their primary focus in most instances and settings.

When schools are thinking about re-opening, they must meet the basic, articulated expectations and best practices for schools or similar institutions. Being aware of local public schools’ operating standards and expectations is of utmost importance. Being able to maintain those standards and, in some cases, go beyond them is vital. Schools should always be asking the basic question: “Is it safe for us to be open and operating like this, right now, in light of what we know?”

Schools will also want to reach out to their insurance companies to see what they advise (many have extensive resources) and to make sure that they are comfortable with the school re-opening. Ensure that any insurance the school has will be in place for when the school is operating.

Finally, and all school leaders know this, there is no hermetically sealed and operating institution. There is an element of risk in school every day.

## **Planning Step 1: Start with Your Mission and Desired Outcomes**

Everything your school does during this planning window should be driven by the collective light of your north star. Aspects of your school’s mission should be baked into your team’s thinking and overall objectives. Your stated objectives don’t have to be fancy; they don’t even have to be for publication. However, having a shared understanding of them will help your team prioritize the work ahead and visualize the outcomes. Some schools have used samples like the letter from [Kennesaw State](#) to outline their objectives and start their planning. As a leader, you should help your team focus on your school’s fundamental objectives and help block out the static of all the other concerns out there.

This is also a place where the board or a committee of the board may play a key role. The articulation of the mission and the school’s priorities, objectives, or goals in the early planning

stage will ultimately drive your outcomes. Engaging the board on some level ensures that they understand what the school is trying to accomplish. Further, the board can support school leadership both in the community and in the planning and implementation phases.

Currently, the schools that are defining their objectives, are prioritizing student and community health and wellness, the quality and substance of the educational experiences of students, and the long-term viability of the institution. There may be other objectives that are derivative of these—and a school's particular mission language will be unique—but these concepts tend to be the fundamental pillars.

Here is one example from the Schenck School as it plans for the 2020-21 school year:

*The safety and health of our students, faculty, staff, and families will lead how and where we learn and operate. Our belief in our mission and our 60 years of experience and expertise will ensure the quality and high standards of our instruction.*

Schools will want to build in here particular priorities or filters they will want to always use in decision-making. For example, as above, most schools are making health and safety a key priority. Others are also aiming to ensure familiarity and comfort for the community as much as possible. And many are including diversity, equity, and inclusion issues to ensure that the most vulnerable in the school are protected and concerns around financial needs are addressed to the best of the school's ability. Still other schools are noting that the school's priority is to keep as many families as possible, even if the school runs a deficit that is larger than it might otherwise consider. These kinds of filters make the outcomes clearer as the team-work moves forward. These can also be built into the school's goals and objectives.

## **Planning Step 2: Identify Your Planning Teams**

There is no one way to tackle the planning process. Some schools will form new cross-functional teams, while others will charge their regular operational teams with new tasks. Each school should identify the team model it is going to use, and get those teams started.

Schools are conducting their planning process for the 2020-21 school year in different ways, using slightly different team structures. The approach a school takes generally reflects its risk management lens where each team is looking at their particular area challenge. Just like in good risk management, the people on your school's planning teams should reflect not just standards of care, but the holistic and practical views of what your school is seeking to accomplish. The teams will involve staff, but they may also involve board members or community members to help bring a level of experience or expertise to the table.

One approach to a team planning structure is the integrated nerve center approach that you can find in this [McKinsey article](#). The nerve center creates a driving and organizing force from the center, with teams then addressing key areas of work. In higher ed, it looks like this:

**A possible framework for a COVID-19 integrated nerve center demonstrates areas of responsibility.**

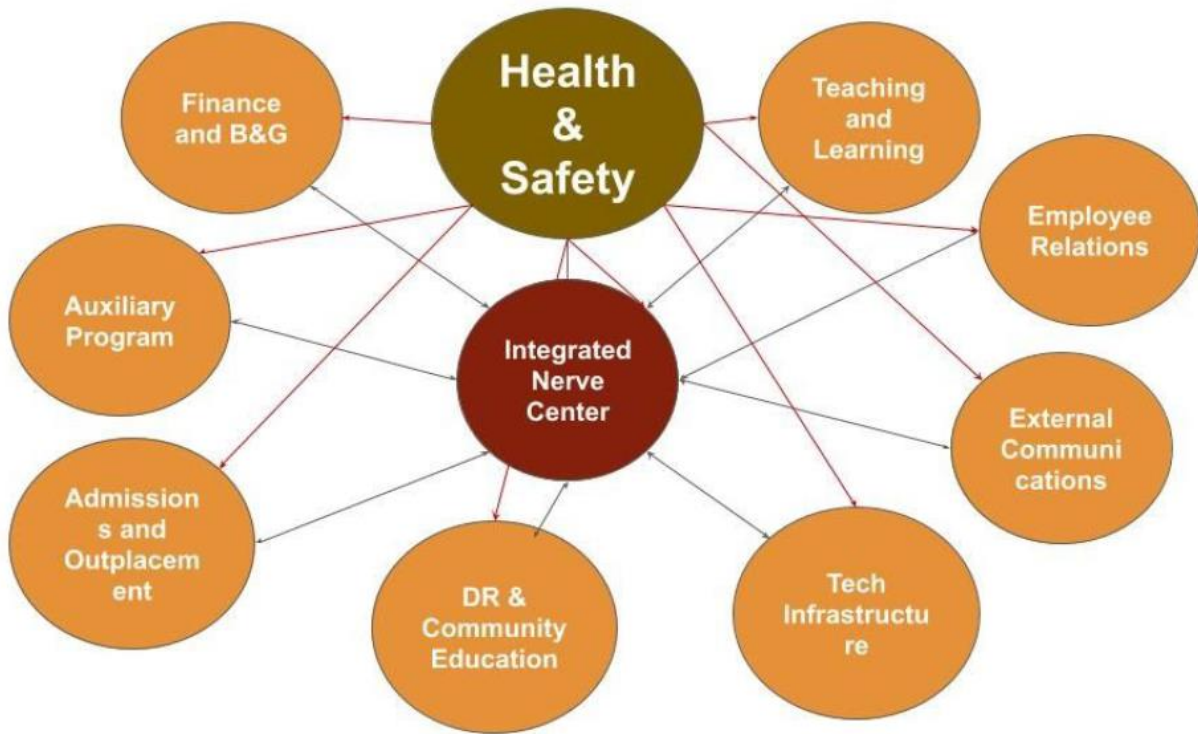
**COVID-19 nerve-center actions**



McKinsey & Company

Upon first glance this integrated nerve center approach may seem overwhelming. You can see in [a sample](#) from Josh Clark at the Schenck School an independent school version of this model. (Also see the visualization below.)

Integrated Nerve Center Model



As long as your teams cover the fundamentals of the major operations and concerns of your school in a reflective way, it does not matter what your teams are called or how complex or simple the model may be. Smaller schools may have fewer teams covering more than one topic area or taking a broader approach.

Another way to visualize planning is through more of a grid approach. [This sample](#) provided by Saint Andrews School in Savannah shows such a grid approach that can be calibrated in Excel. This school uses seven plan areas: Student and Faculty Health, Modified Delivery and Schedules, Campus Security and Safety, Communications Protocols, Student Support, Parent Support, and Business Continuity. This school breaks down tasks down into strategic, operational, or tactical. The grid helps create a timeline and process.

How your school visualizes your planning approach should reflect your school's own needs and considerations.

**Planning Step 3:  
Clarify the Charge of Each Team**

It is important that each team understand the tasks ahead and its piece of the puzzle. It should also understand where compromises may be made relative to the school's *usual* objectives. For example, while typically a team focused on finance would be working toward a balanced budget,

this year, its objective may be to have a balanced budget *with the understanding* that there may be scenarios that include acceptable shortfalls.

When you draft the charges for the teams, the tasks outlined may seem overwhelming; often you are asking teams to shift the fundamentals of the school away from the very platform for which they were built. It's important to break down the magnitude of this project into its components to get people to wrestle with pieces of it.

Ultimately, compromises may need to be made between the teams as the work comes together as they may develop plans that conflict with each other in some way. These conflicts are normal, and it helps to return to the original mission and objectives you outlined to help keep the ultimate plans centered on the nuances of what gives your school its identity.

What you are planning for is different from what you delivered this spring. That was emergency remote learning in a crisis. Your objective here is to deliver a much more integrated, sustaining experience for your entire community.

Again, borrowing from the Schenck School's planning approach, here is sample language for various teams charges.

### **Sample Team Charges**

#### *Nerve Center*

Whatever you want to call this team—a nerve center team, a management team, or an administrative team—this is the team that follows up with the other teams and coordinates the work across divisions and groups. It is often the main communicating arm of the school.

#### *Sample Charge:*

*The Nerve Center team is the coordinating head of the larger integrated structure. Its purpose is to set the overall tone of our COVID-19-response work, acting as a single source of truth, in real time, for all information and actions related to the outbreak and response. It must maintain close two-way communication with all teams.*

#### *Health and Safety Team*

This team will need to be on top of how what we learn about the virus will affect the school's practices and decision making.

#### *Sample Charge:*

*The Health and Safety Team's charge is twofold:*

*Design and continually update a decision matrix that informs how learning and operations should commence based on current health and safety guidelines*

- *IF conditions look like this, THEN we learn / operate like this....*
- *Design and continually update the policies, procedures and precautions that ensure the health and safety of our entire community.*

#### *Teaching and Learning Team*

This team will balance out what is being delivered with the various new challenges in how it is being delivered.

**Sample Charge:**

*The Teaching and Learning Team is charged with ensuring that the approach and execution of teaching and learning fulfills the school's mission and meets reasonable parent and faculty expectations, regardless of the vehicle / format dictated by health and safety guidelines.*

*Finance and Buildings & Ground Team(s)*

Some schools break this group into two teams, others keep them together. It is entirely a matter of how your school tends to operate. For schools with more complex physical space, having two teams might be useful. Either way, this team is doing modeling for finances (enrollment, financial aid, giving) and ensuring that the campus is being cleaned and maintained the way it needs to be during this time.

**Sample Charge:**

*The Finance and Buildings & Ground Team is charged with ensuring the School and Dyslexia Resource are aware of the options and take the necessary measures to maintain their good financial health. In addition, it will ensure the buildings and ground are maintained and modified to meet health and safety requirements.*

*External Communications and Relationships Team*

This team is vital during this window as it maintains the communications calendar, ensures that messages are consistently delivered with a regularity and tone that are designed for the community. It leads communications that speak to what the school is doing now, but also considers philanthropy-related outreach. Having a team dedicated to this function helps keep Ian Symmonds' [current insights](#) about communications front and center.

**Sample Charge**

*The External Communications and Relationships Team is charged with maintaining proactive, balanced, and reassuring communication to all constituency groups outside of faculty and staff. In addition, this Team will ensure the school continues to cultivate relationships and philanthropic investments in the School and DR.*

*Auxiliary Programs and Services Team*

Many schools have had a hard time maintaining auxiliary programs—such as after-school care, athletics, and summer programs—during emergency remote learning. If your school has a substantial athletics program, that may need its own team to manage its challenges.

**Sample Charge**

*This Team is charged with ensuring the auxiliary programs and services offered to the school and wider-community are responsive to the needs of the changing situation.*

*Admissions and Outplacement Teams*

This team will be looking at traditional admissions, but also considering new ways to tour and interview families, as well as ways to bring new families into the fold and retain current ones.

#### Sample Charge

*This team is charged with ensuring that the School is able to continue the vital functions of recruiting, screening, and accepting students and identifying students who may be prepared to transition, educating families about the process, and navigating any changes or new variables.*

#### *Employee Relations Team*

Note that this team is not called “human resources.” This team should not only address staff compliance and safety, but also their overall support and well-being. Other schools sometimes represent these concerns in a “Staff Support” team.

#### Sample Charge

*This team is charged with ensuring the School and DR are in full compliance with evolving health and safety requirements, that personnel policies are updated as appropriate to meet the changing situation, and that all employees are receiving the appropriate support and encouragement.*

#### *Specialty Team: Dyslexia Resource and Community Education Team*

For the Schenck School, this is an important arm of its mission-driven work. If your school has a marquee auxiliary service, a secondary business within itself, or some other structure, making sure that entity also has a planning team is critical to maintaining its long-term success and integration into the school’s overall plan.

#### Sample Charge

*This team is charged with continuing the mission and work of the Dyslexia Resource within the context and needs of this rapidly changing situation. In addition, this team will consider ways to educate internal (current families) and external (broader community) about dyslexia and related topics.*

#### *Technology Infrastructure Team*

Schools often have two kinds of technology approaches happening simultaneously—infrastructure and education. The latter is often incorporated into teaching and learning, the former might have its own team to provide support to staff, students, and parents during this time. This team is particularly vital for schools that have community members in rural areas or one-to-one programs that the school supports by providing laptops or tablets.

#### Sample Charge

*This team is charged with ensuring the School and Resource are equipped with the infrastructure, equipment, and software necessary to immediately execute a high quality response to each scenario.*

#### *Student Life Team*

Schools may have different names for this team, but all schools should make sure that this team and others are thinking about overall student wellness, as concern for student connectedness and



overall health has become a major concern. This team can also serve as a safety net for students who may be falling through the cracks.

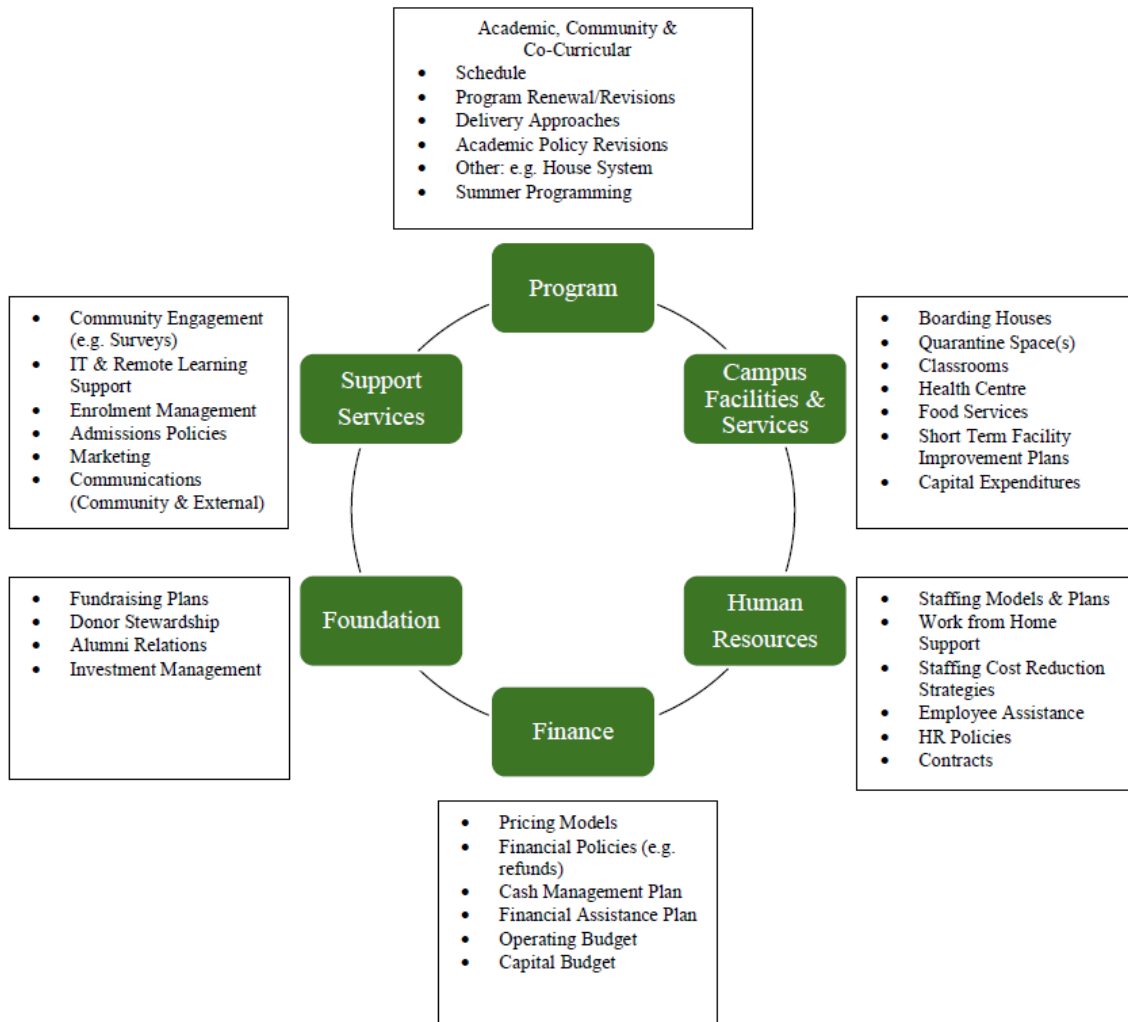
#### Sample Charge

*This team is asked to ensure that the non-academic yet equally important aspects of The Schenck School continue such as Houses, socialization, confidence building, dyslexia empowerment, etc.*

### **Integrated Nerve-Center Structure vs. the Traditional Team Structure**

If your school is using its traditional team structure already in place to plan and build out scenarios, that is more than adequate. Just make sure that your teams are covering the necessary areas and that the teams incorporate all of the skills and voices you need at the table. For example, while health and safety may ordinarily be addressed by the school nurse, counselors, and a couple of other voices, at this time you may also need voices from the community and the help of other key administrators and/or board members with relevant expertise.

As a practical matter, whatever you call them and however you organize them, these teams have traditional areas for which they are responsible. The following planning visual from a school in Canada shows how traditional teams can cover key areas needed in planning for school year 2020-21.



## Planning Step 4: Lay out Key Assumptions

Once you know how you are going to divide and conquer the work ahead, the next task is to set the stage. Begin with what you know now—the current assumptions that are in front of you. It is okay that you do not know all of the nuances. You can adjust plans later. The next step is to lay out the scenarios that you see likely for your school. These steps—laying out assumptions and mapping out scenarios—are connected, but not the same.

The key assumptions below are taken from a [guiding document](#) put together by Saint Paul's School in Mobile, Alabama; they reflect insights from two physicians, one with a background in infectious disease.

## Key Assumptions: Sample Language

- a. Mitigation and social distance strategies seem to be working in reducing the number of expected deaths and limiting the burden on the health care system. The effect of the mitigation strategies is now visible, with actual deaths far below initial mortality projections. This is extremely positive news and points to the efficacy of the approach.
- b. At some point the economy and the country will have to re-start. Unfortunately, despite our desire for a return to normalcy, the full materialization of this goal is unlikely soon; the COVID-19 virus is now widely present across the country and it is likely that immunity may only be present in a small percentage of the population. Given the virus infectivity, which has now been corrected to an average of 5 individuals infected per infected index case, the percentage of the population that needs to be immune before the epidemic stops is 81%. This can only be achieved by the development of “herd immunity” through natural infection and recovery, or by broad vaccination efforts.
- c. Until an effective vaccine is developed and widely administered, this disease will continue to affect communities across the country; the number of cases and deaths will be directly dependent on the strength of the mitigation measures in place.
- d. It should be fully anticipated that several additional waves of infection are likely to affect any given community until a vaccine is available. The disruption caused by these waves could be significant, especially during the fall when COVID combines with influenza and other respiratory infections.
- e. Given this likelihood, schools will have to develop innovative plans for continuation of activities over the next 18-24 months.
- f. It is impossible at this time to determine exactly when it will be safe to re-start school activities. In order to prepare for an eventual return, institutions where mass or group gatherings are expected (including schools) need to have sound onboarding plans to protect students, faculty, and families. These plans should include:
  - i. Screening for recent signs of infection and recent diagnosis
  - ii. Screening for recent contact with diagnosed individuals and persons under investigation
  - iii. Institutional ability to provide social distance physical barrier measures
  - iv. Well-delineated processes for communication with public health authorities in charge of contact tracing.

Some schools go deeper into current assumptions and challenges, including very specific insights into categories of concern as well as driving forces or outcomes the teams need to incorporate as they work. These assumptions can help the teams understand the current expectations or limitations that are different from how a school would normally plan. For example, this list of assumptions below has a section on finance that acknowledges the likelihood of a recession and the reality that the school may not operate with a balanced budget. It also makes clear that staffing decisions may need to be made. Stating these assumptions gives the teams permission to have these choices on the table.

This sample Key Assumptions language below is from a boarding school, so not all components will apply to all schools. However, it is helpful to see the longer-term considerations being brought to bear. Schools should pay particular attention to how this school is building in expectations around comfort with a less than break-even budget, expectations around community continuity for on and off campus experiences, as well as an understanding of the long-term changes that schools may be making as a result of this sudden change to the landscape and the potential constricting of the market sector.

### **Key Assumptions and Implications: Sample Language**

A number of key assumptions and corresponding implications will underpin and inform our planning for the 2020/21 school year, as outlined below:

#### **Pandemic**

- *Travel restrictions*: travel restrictions could extend into the 2020/21 school year, with international students at greatest risk of being impacted
- *Physical distancing*: when the school reopens, some physical distancing requirements are likely to remain in place, which may impact the number of students we can accommodate in our dorm rooms, classrooms, dining hall and other gathering spaces
- *Ongoing waves of COVID-19*: after the school re-opens, there could be subsequent waves of COVID-19 until such time as a vaccine is made widely available (projected to be by spring 2021), and such subsequent waves could require the re-introduction of stricter control measures; dedicated on or off campus isolation facilities may be required, the potential for a homestay program could be explored or we may need to again close the school and revert back to a remote learning program
- *Serology testing (i.e., testing who is immune)*: serology testing is expected to become available on a widespread basis by June, creating the potential for “immunity passports”
- *Uncertainty risk*: uncertainty about how the pandemic will impact the upcoming school year creates a significant risk that families could abort their planned enrolment for 2020/21
- *Low density location advantage*: the fact that we are located in a low density, rural setting may provide some marketing advantage in a pandemic due to the perception of greater safety compared to urban settings

## **Financial**

- *Recession*: the economic downturn precipitated by the pandemic will have an adverse impact on enrollment demand and will generate significantly increased need for financial assistance
- *Enrollment shortfall*: we anticipate that our enrollment for the 2020/21 school year will be below target, with a wide range of possible scenarios as to how far below target we could be
- *Summer revenue*: the majority of our summer camp tenants will not operate this year due to the pandemic, which could result in the loss of up to \$x of revenue
- *Financial strength*: we are fortunate to be entering this crisis period in a position of financial strength, with a strong balance sheet, no debt, healthy reserves and a robust endowment
- *Strength and Permanence*: while we will strive for a balanced budget for 2020/21, we recognize that we may need to run a deficit in order to sustain spending that will be integral to our long-term competitiveness; we may also need to make short-term decisions on admissions and pricing models that are not ideal from a long-term perspective
- *Human resources*: staffing decisions for the 2020/21 school year must be driven first and foremost by how best to serve the needs of our students; difficult decisions may need to be made that will be informed by our values, financial prudence, our long-term need to retain talent and our learnings from 2015
- *Adaptive pricing models*: we will need to embrace adaptive pricing models that account for inherent differences between remote learning and on campus learning; we should consider exploring modular pricing options (e.g., pricing per course, activity, etc.), but must also be wary that such pricing models can be difficult to unravel later
- *Refunds*: we have told families that we will offer a partial refund for this school year, and we have also guaranteed that we will refund tuition payments without penalty for the 2020/21 school year up to July 31 should travel restrictions prevent students from attending
- *Alternative revenue generation*: the pursuit of innovative alternative revenue sources should be explored; we could seek to bolster recruitment of day students given uncertainty about boarding, potentially even exploring offering a grade 6, 7 and/or 8 day program; we could also seek to extend remote learning options to new markets (e.g., summer remote learning for students who are not enrolled in our full time program)

## **School Program and Community**

- *Strategic Directions*: we will continue to be guided by our four strategic directions of .... to the extent possible in the circumstances, recognizing that some strategic pivots may be necessary
- *Remote learning*: we will offer remote learning options for students who are unable to be on campus physically, and we will have the ability to switch rapidly between remote and on campus learning platforms if circumstances require

- *Education of the whole person*: our remote learning platform should continue to encompass meaningful academic, co-curricular and community components, which have been differentiators for our remote learning program to date
- *Flexibility*: innovative program models that enable increased flexibility of student entry points will be advantageous given substantial uncertainty about how the pandemic will unfold; in addition, we should not be limited by the traditional concept of a school day, week or year, or by the traditional timing of our school breaks
- *Community*: maintaining the strength and unity of our community is integral to the student experience and our culture; we must therefore strive to maintain the cohesion of our community even if some students are learning remotely while some are on campus; segregation between the two groups should be avoided to the extent possible; to the extent some classes may need to be run in a segregated fashion, we should strive to ensure cocurricular and community programming be run with all together
- *Boarding*: once public health authorities permit us to re-open, we are committed to offering a safe boarding program for those students who are able to attend
- *International boarding*: given the importance of international boarding markets to our future, we will sustain remote learning options for international students even if those programs are under-subscribed
- *Growing acceptance of remote learning*: our early experience with remote learning has been generally positive, and our faculty and staff are quickly ramping up their skills and comfort with remote platforms; students will also likely become more open to virtual learning or hybrid learning models as a result of this experience
- *Impermanence of remote learning for our core program*: we do not expect to continue broad-based remote learning options for our core program beyond the COVID-19 pandemic crisis; ultimately, our value proposition is a high-touch experience that is rooted in close personal relationships and in our unique physical campus; we do not believe that the economics of continuing remote learning indefinitely would be attractive for our core program

### **Independent School Sector**

- *Accelerating change*: throughout history, major inflection points tend to accelerate existing change forces; for our sector, this likely means moving more rapidly into online learning, competing globally for students and leveraging technology to personalize education; we should strive to position ourselves to take advantage of opportunities that may be presented
- *Contraction and consolidation*: there will likely be some restructuring in the independent school landscape as a result of this crisis; some schools will not survive and some may close their boarding programs; other schools may be open to innovative partnerships to sustain quality programming for remote students

## **Planning Step 5: Map Out Scenarios**

At this point, most schools are planning for at least three scenarios, and then sometimes variations on the themes within the scenarios. The first is “business as usual” with the ability to move online built in, if needed, and likely working with staff and families who may not be comfortable being on campus yet. The second scenario involves the campus having to practice social distancing and generally working under the assumptions that the number of people in a classroom will be limited and that vulnerable staff and students will need to stay home. The third scenario involves the school needing to continue providing remote learning only.

The second scenario is the one that could have various levels of restrictions on social distancing and other elements within it. As a result, this scenario is triggering the most variation, as the operations are the most complex. Each school should decide which variation works best for them, recognizing that the approach may differ by division. When considering this particular scenario, schools should remember that not all staff and students may be able to come to campus during this time either due to vulnerability or reluctance for safety concerns.

Schools are looking at some of the following possibilities for this scenario:

- Having students come to campus only certain days of the week
- Having some students on campus in the morning, others in the afternoon
- Having certain grades come to campus certain days and/or having certain grades are on campus for longer times. (Note: Some colleges are considering having only freshman on campus for the fall semester.)
- Starting the school year later
- Scheduling concentrated courses in a semester instead of offering full-year courses

It may help to look at these [different options](#) that higher education is considering in different ways at different campuses. Do not be limited by requiring all classes or grade levels to do the same thing at the same time. For example, grades pk-4 could be on campus with older grades remote learning every day, potentially with some upper grades on campus in the afternoons. Or, the school could build capacity over time with starting with lower grades and adding up grades as the semester goes on. Any number of options could be on the table.

The other two scenarios where the school is all the way open or fully remotes should not be ignored, as they involve their own community challenges, particularly when the school has to go in and out of the other scenarios. Schools should also remember that some families may find that they prefer the flexibility of the online or blended learning environment and planning for meeting those needs in the future would not be misplaced.

### **Key Considerations**

Regardless of how you go about these planning steps, there are many key considerations. Below you’ll find initial starting questions for your teams.

These questions are by no means a complete list of what schools should be considering as they work through their plans to return to campus. They are a jumping off point as schools begin their work. Some of the questions may not apply to all schools, and there are likely more questions or areas that schools will want to consider.

### **Health and Safety**

Schools often strive to provide safe environments for their students and in no time is that focus more relevant than it is right now. Schools should be focused on understanding both the requirements being put in place by federal, state, and local laws, but also be thinking through smart ways to implement those requirements in such a way that they meld into the school's culture and the family experience as much as possible. Schools confronted with a variety of recommendations should generally choose the one that is most restrictive. This is also true with the safety protocols the school puts in place across all programming. There should be no exceptions to safety requirements without documentation that shows the variation is appropriate and safe for the circumstances.

- What are the relevant federal, state, and local agencies providing guidance or making decisions on behalf of the school? Who on staff are monitoring those agencies?
- What new policies and practices need to be implemented?
- What policies need to be updated now?
- What communications do we need to have ready?
- What standard operating protocols do we need in place for temperature reading, quarantining, social distancing, etc.?
- What mental health supports and structures do we currently have? Where do we need more?
- What are other schools that are already managing a return to school doing?
- What relevant state or local pandemic guides should we track? (See this [example](#) from Nashville.)
- What safety materials such as masks, sanitizer, soap, etc., do we need to supply and what should students and staff bring with them? How will we acquire these?
- How will testing for COVID-19 and antibodies work in our area?
- How will results affect our systems?
- If someone within our community tests positive for COVID-19, what is our overall operational response? Who is tracking for updates and changes in this area?
- What new agreements, waivers, and education should be provided to parents, students, and staff about the new operating protocols for the school moving forward?

### **School Operations**

For most schools, this is the most complex part of the planning scenarios. Schools are reconciling what are designed to be relationship-based, collaborative, creative, warm and welcoming experiences that encourage friendships and casual connections with requirements that keep everyone six feet apart. This particular area requires an eye for detail and a review of every aspect of school life from carpool, to meals, to class changes, to going to the bathroom.



- From beginning to end, what would a student schedule look like if we were to maintain social distancing at all times?
- What tools can we use to do the best we can to maintain that social distancing at all grade levels?
- How do we use these [risk management controls](#) from Johns Hopkins to manage safely delivering education?
- How do we manage the absence from campus of vulnerable staff and students? What percentage of our community do these groups represent?
- What options work best for our campus and community if only half of the community can be on the campus at any given time?
- What would various levels of restriction on campus access look like? (Consider all visitors, including vendors, volunteers, parents, tour groups, etc.)
- What would standard community events and gatherings look like online?
- How would we manage delivery of meals?

### **Facilities**

The virus can live on different surfaces for varying amounts of times and high touch locations are where it loves to catch a ride. Schools, with their light switches, door handles, banisters, gym equipment, bathroom handles, cafeterias, and plethora of other surfaces that students, staff, and visitors brush daily provide innumerable opportunities for the virus to take hold. Schools will need to follow new disinfecting protocols, but also should consider how to reduce high touch locations through motion sensors and the like. Schools will also want to carefully study parts of the campus where there should be limited use or access depending on the state of the outbreak.

- What new disinfecting and other cleaning steps must we follow?
- How do we secure supplies and gain the expertise to follow best practice?
- How can we document these steps reliably?
- How do we ensure that students are not using facilities or parts of campus where they should not be at this time?
- What training protocols do we need for staff on new safety and security methods?
- Where do staff need additional help in following new protocols?
- Building and facilities updates / additions – what physical state will they be in in the fall?
- What changes can we make to facilities to limit high touch areas (automatically opening doors, kickplate doors, etc.)
- What additional sinks and sanitizing stations needs to be added?

### **Teaching and Learning**

The coronavirus has caused many schools to pause and truly think about the focus of learning when on and off campus, particularly in light of the additional strain families and staff are confronting given the magnitude of the pandemic. This requires more focus on how smoothly communities can transition from in-person to remote learning, and how smoothly they can create blended environments. This is particularly important given that many schools anticipate a period during which not all students may be on campus at any given time. This new mode will require lesson plans and the entire educational experience to work for both students and staff physically present and those working from home. Schools are also aware that this spring was an experiment

in emergency remote learning, while this fall and the academic year ahead will need to be a more comprehensive approach to a different kind of learning experience, particularly if schools expect to continue to charge regular tuition pricing.

Further, schools will need to ensure that staff members are not over-taxed as they continue working in these unprecedented and novel times. Finally, schools should be regularly reflecting on what they have learned about their students during this time as well as what new opportunities there are for shifting pedagogy or delivering services through different means, potentially to an expanding base of students.

- What are our objectives for learning during remote learning?
- How will we assess where students are when we return to school in the fall?
- How do teachers understand and use the different strengths behind in-person learning and remote learning?
- What adjustments will be needed to curriculum at the beginning of the school year to ensure that students have sufficient skills to move forward?
- What support are we providing to teaching staff as they plan for bimodal education delivery?
- What did we see in our students during remote learning that we want to strengthen for the future? (e.g., if students lack agency over their learning, growing that strength)
- What shifts must we make in pedagogy when shifting to remote learning?
- How do students and parents understand the changes and differences between the two modes of learning?
- How do we make remote learning and on-campus learning more seamless in a blended model?
- What technology improvements or upgrades are needed to continue learning both on and off campus?
- What additional training to staff, students, and parents need on new devices or tools?
- Does the school's current technology infrastructure support the vision of the teaching and learning ahead?
- What opportunities are there for the school in new markets or delivery to new types of students?
- How does what we learned in remote learning help us think about how we use time on campus and in class?

## **Community**

Far and away, the question of maintaining and growing community is among the top concerns for all independent schools. Parents, students, staff, and alums all look to the school to provide a community nexus and support structure. For students in particular, the school community provides an opportunity to engage with activities, sports, student leadership, creative outlets, and more. How can schools continue to embrace and grow community while on and off campus and maintaining social distancing?

- How are we maintaining our community through these varying modes?

- What opportunities are there to engage parents in ways we have not before?
- What student activities are available to continue to foster student culture and community?
- What does the communications calendar look like for our school in our various operational modes? In each case, who is doing the communicating with which audiences?
- What sample communications should we have in place before the start of the year?
- How should we be talking about giving, admissions, financial aid, vulnerability, and equity now?
- What systems do we use to ensure that all school communications reflect agility, flexibility, compassion, and care?

### **Diversity, Equity, and Inclusion**

Many schools are taking a “DEI” lens to all of the decisions they are making to ensure that they are not inadvertently affecting or excluding underrepresented or vulnerable parts of their school community. Never has this priority been more important in how a school thinks about its work and decisions.

- How do our decisions, processes, and vision for operations during this time potentially impact the most vulnerable people in our community?
- How do we make sure that the school priority around diversity, equity, and inclusion is fully present in our new mode?
- Where are there opportunities to raise awareness of diversity, equity, and inclusion in our teaching and learning now?
- How are we meeting the needs of diverse learners?
- Are there implicit assumptions built into the systems we are building that are not reflective of the needs of our families or staff?
- Are we managing any additional expenses of additional technology or other needs for families or staff that might find them difficult to bear?
- How does our adjusted school day address concerns for students or families who rely on the school for childcare or other school support systems?
- How are our virtual admissions systems designed to reach diverse families of all kinds?

### **Wellness**

Before the pandemic, wellness in the United States was already an important topic garnering a lot of attention. Since the onset of the pandemic, the issue has become even more vital as individuals cope with anxiety, depression, loneliness, and other mental health struggles in a very trying time. Further, for some families and staff, quarantines and stay at home orders have required them to live in an abusive or otherwise exacerbating environment without an outlet. Finally, schools are asking staff to maintain their professional roles while managing their domestic lives simultaneously, a Herculean task. Wellness speaks both to community and the heart of a school’s empathy.

- *Student Support*
  - How do our current student support structures need to shift to support students better during this time?
  - What new structures might we implement?
  - How do we know how are students are doing?
  - What resources (human or otherwise) or systems are we providing to teachers to identify students of concern or to further support students outside the classroom?

- How does our daily schedule reflect student support?
- How do our learning and teaching outcomes reflect the outcomes we seek for student wellness?
- What are we doing to maintain student community when in wholly remote or partially remote scenarios?
- Is there any support that should be provided to alumni right now, particularly to recent graduates?
- *Parent Support*
  - How do we maintain the school community without on-campus events?
  - How are we supporting parent understanding of school objectives during off-campus learning?
  - How are we keeping parents engaged?
  - How do help calm parent anxieties about their students? (Identify developmental milestones/topics: college process, learning loss, social emotional learning, socialization, extracurriculars, etc.)
- *Staff Support*
  - How are we supporting the wellness of our staff?
  - How are we maintaining staff confidence in the school direction?
  - How are we supporting staff needs appropriately?
  - What systems do we have in place to allow staff to work with the school about concerns?
  - How are we using the staff we have available to fill new roles and needs?

### **Athletics**

For many adults and students, athletics are a fundamental part of education. They teach teamwork, mastery, dedication, leadership, and perseverance among so many other important skills and traits. And yet, so many athletics require close quarters between athletes. Add in travel, locker rooms, and overnight trips and there are many challenges ahead for athletics this fall. Schools are often looking at ways they can capture the benefits of athletics in modified programs going into the fall, with the long-term hope that students will be able to play on some level at potentially other times of year.

- With which organizations should we be working to ensure that our athletic operations are meeting current safety guidelines?
- What kinds of athletics might be “safe” with social distancing?
- How will this impact our physical education curriculum?
- How soon might we reasonably see a return of competitive athletics?
- How will this impact our students? What supports might they need in light of this loss?
- How might we fill any void left by the temporary loss of athletics?
- How do we meet the exercise needs of students in a social distancing context?
- What other ways might we use our athletic facilities in the meantime?
- What forms do we need for students to participate in sports on and off campus?
- What do safe numbers look like within the athletic areas?

- What additional testing is needed for athletes?
- What are safe circumstances for spectators?
- Six feet is not a safe distance for active athletes. Some experts say 12 feet should be the norm in fitness rooms and during other workouts. How will that affect ongoing sports on campus?
- What cleaning and disinfecting protocols will need to be in place for athletics facilities?

## **Financials**

If community is the heart of the school, the financials are what help keep the blood pressure of the school stable. Right now, it is important to have a firm grasp on the school's dashboards to understand how enrollment, financial aid needs, changes to auxiliary income, and new delivery modes are all potentially impacting the school's overall financial viability. Schools should be thinking about what is possible in the short-term for financial short-falls or other bumps in the road while envisioning what is possible with new approaches and modules for the long-term.

- What standard budget models do we have now (there should be at least three)?
- What changes need to be made for each of the budget models? What are the school's priorities when making those decisions?
- Will the school be charging full tuition for online learning? If not, what does that model look like and how is the school budgeting for that change?
- How much of a shortfall can the school manage in the short-term?
- What other auxiliary revenue models or streams should the school consider in light of the success or interest in online learning?
- What impact will the change to auxiliary programs (summer camps, athletic events, etc.) have on the school's overall budget?
- What financial models should the school consider to reduce the cost of online learning?
- Does your investment policy need to be reviewed and updated?
- If extended tuition payments, will your cash flow be adequate to cover expenses?
- Do you accept credit cards for payment?
- Are you ok losing your summer revenue? Can you do community events during the fall on weekends that will cover some of the loss?
- Schools with current loans outstanding:
  - What are the payback obligations?
  - Can loan payments be delayed?
  - Are there any terms within loans or bonds that will limit the school's flexibility in using its endowment or other resources right now?
- Is now the time to take on short term debt?
- Will current vendors extend credit or lower payments for supplies, food, etc.?
- Are we taking advantage of consortium purchasing?
- Does your board need to change / add expertise in any field immediately?
- If federal financial assistance has been received, what policies, procedures, and trainings must be adopted?
- *Human Resources*
  - What employment related policies need to be updated now?
  - Are there any changes to employment agreements that must be made?

- What additional training will be required as we return to campus?
- How would we carry out a reduction in force if needed? What is the paradigm for doing that?
- *Enrollment management*
  - How must enrollment management change to bring more families into the school from a distance?
  - What is our philosophy around financial aid for families during this window?
  - How are we ensuring a diverse candidate pool while we are in our virtual mode?
  - What opportunities are there to leverage the success we have had moving students to remote learning?
- *Advancement*
  - How will the school's considerations of philanthropy change during this window?
  - What are the short and long-term development goals for the school's advancement work?
  - What new and different ways can the school engage alumni?
  - What new and different ways can the school engage in community fundraising events?
  - Where should fundraising be focused? (financial aid, endowment, staff salaries and support, etc.)

## **Conclusion**

Right now, schools are moving beyond the initial transition to online learning, with all of the exhaustion and wear that has gone with it. Now as we regain our footing, we can start to plan for re-trenching in this "next normal" to continue to deliver excellence in our service to families and in our operations as a whole. Every school will approach this necessary planning work differently, but all will approach it one step at a time. Do not let the complexity of these visuals or lists intimidate you or your team. What's most important is to start taking steps, and to keep these steps grounded in your school mission and culture.