

About EdOps

EdOps is an education consulting firm specializing in the finance and operations work of leading schools. Our mission is to minimize the financial, operational, and compliance demands of running a school and to support education leaders with data-driven insights to improve student outcomes. Our range of services includes accounting, procurement, grants management, student data management, human resources, strategic consulting, and facilities finance support.

With a growing team of 60+ education professionals around the country, EdOps works with a range of schools and networks in multiple states to ensure **operational excellence in support of student achievement.**

Your Facilitators



Karianne Chassee, Louisiana Regional Manager

Karianne has been serving charter schools in New Orleans since 2013 in the areas of finance, human resources, and operations. Before joining EdOps, she served as the Chief Operating Officer of Lycée Français de la Nouvelle-Orléans, which she helped grow from 400 students to nearly 1,000 students in a five year period. Karianne is both a Certified Public Accountant and a Society for Human Resource Management (SHRM) Certified Professional and holds a

Master's in Accounting from Louisiana State University. Prior to her career in education, Karianne worked in public accounting, where she served a wide variety of clients, from large public entities to local non-profit organizations.

Natalia Bovkun, Managing Principal / Consulting Director

Natalia joined EdOps in 2015 as a Finance Specialist, supporting five charter networks in DC and Maryland during her time in that position. She was then promoted to Consulting Manager, and ultimately, to Director of Consulting and Managing Principal. As part of the consulting practice, she has managed many strategic consulting projects for charter school clients. Prior to her work at EdOps, Natalia completed an Education Pioneers fellowship and managed the

investment analyst team at Strategic Investment Group, an institutional investment management firm. Natalia has a BA in Economics and a BS in Public Relations from Boston University, and an M.Ed. from Harvard.

Session Objectives

Throughout the course of the two operations excellence sessions, we will:

- Share insights on operational excellence and its five pillars
- Explore two of the pillars (Roles & Responsibilities and SOPs) in more detail
- Discuss reconceptualizing the ops team's role
- Provide best practice tools to build upon ops practices at your schools

Five Domains of Operational Excellence

There are many factors that contribute to well-run school operations. We believe there are five pillars to creating an effective operational environment.



Our experience working with school leaders across the country has also led us to develop a perspective on operational excellence:

1. **There is no silver bullet.** Pursuing incremental improvement across the five core areas is more likely to lead to success.
2. **Do not over-engineer.** A simple, consistently implemented process aligned with the school's size and needs is always better than a more complex one.
3. **Take ground gradually, and keep it.** It is best to go slow or take a measured approach, especially at first, to avoid re-work and/or staff frustration.
4. **Explicitly identify dependencies.** The sequence of implementation will depend on when certain steps are taken (e.g. cross-training once roles are defined).

Roles & Responsibilities: Quick Check

Operations Process	Who is accountable for making sure this gets done? (A)	Who completes the task? (R)
Returning student re-enrollment		
Student data / compliance submissions to LA DOE		
Changes to student contact info		
Entering student attendance and ensuring accuracy		
Medication administration tracking		
Staff time & attendance tracking		
Field trip management		
Staff training tracking		
Procurement bidding process		
Monitoring visits- grants		
Background check tracking		
Staff recruitment		
Board minute submissions		
Inventory for technology		
NSLP Meal Tracking and Claims		
Family Communication- non emergency		

How many blanks are there? _____

Tool Spotlight: RACI

RACI enables teams to clearly define each person’s role for each process or task. For each task, individuals are assigned one of four roles:

Responsible	“The Doer.” The individual(s) who actually completes the task
Accountable	“The Buck Stops Here.” The individual who ensures task/ process succeeds Should only be 1 person; has veto power; may or may not be the same person as “the doer”
Consulted	“In the Loop.” Those consulted prior to the final decision / task Typically a subject-matter expert; input affects process / task
Informed	“Keep in the Picture.” Those who must be informed after the task One-way communication – NOT solicitation for feedback or advice

Roles & Responsibilities: Example RACI Matrix

Fill out the RACI matrix below with R, A, C or I for the two processes below. Feel free to add a third process.

	Potential Players							
Tasks	Front Office	Dean of Students	Principal	Dir of Ops	Teacher/Teacher Aide	Food Service Manager		
Entering student attendance and ensuring accuracy								
Family Communication-non emergency								

Scenario: Standard Operating Procedures

Apex Charter School is preparing to open its third campus next school year. It's May 1, and they are anticipating hiring and onboarding over 20 new teachers in the coming months. The staff onboarding process involves several departments from the central office (Human Resources, Facilities, IT, Compliance, Accounting) as well as school-based staff (Director of Ops, Principal). They want to leave no room for error and ensure all new teachers can hit the ground running once they start on August 10.

What does each of the positions or departments mentioned above need to do to ensure a successful onboarding for these 20 new hires? On what timeline?

Do Now #3: SOPs Scenario Reflection

For each of the positions/departments involved, list some tasks they may be responsible for in the offer letter process.

Facilities:

IT:

Human Resources:

Compliance:

Accounting:

Director of Operations:

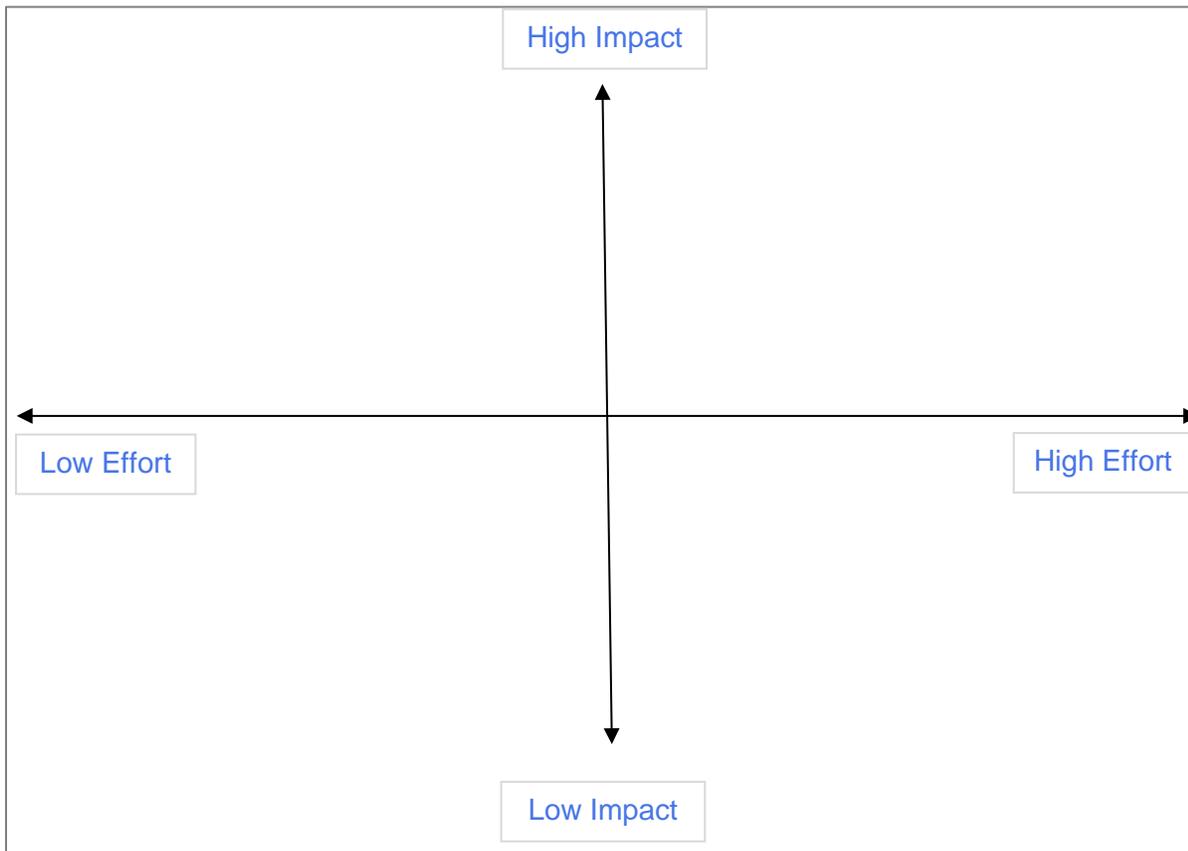
Principal:

SOPs – Your Recurring Tasks

Jot down a list of recurring (weekly, quarterly, yearly) tasks you undertake in your current role.

SOPs: Plot Your Tasks on Impact / Effort Matrix

Jot down a list of recurring tasks you undertake in your current role.



Reconceptualizing the Ops Team's Role

Write down two specific things that you as an operations or academic leader can do to bring the Operations team closer into the school's community and improve the operations/academic collaboration

1.
2.

Next Steps

1. Clarifying Roles & Responsibilities

Select two tasks from your "Quick Wins" quadrant and create a RACI for it identifying all the involved persons. If a division of roles already exists, review and refine it to make sure it matches current practice.

2. Writing Standard Operating Procedures

Select one or two tasks from your "Quick Wins" quadrant and create an SOP. If an SOP already exists, review and refine the existing SOP. If you're feeling ambitious, choose a task from the "Major Projects" quadrant, instead.

3. Reconceptualizing the Ops Team's Role

Put into practice one of the two actions identified above.