

# Compass Charter Schools

## Organizational Restructure Study

June 2021



Edgility Consulting. Building inclusive searches. Placing exceptional leaders.  
Advancing equity. Every time.

# Our Discovery Process

We analyzed the last couple of years of staff engagement data to elevate themes for our deep dives. It was clear that staff wanted deeper levels of **trust, support and efficiency**.

**We conducted 30 stakeholder interviews**, both group settings and one on one, to connect with Compass staff and understand the root causes of the issues showing up in the data.

The following pages synthesize our findings from our stakeholder interviews and provide rationale for the design and recommendations that follows.

Internal Findings

Opportunities

Philosophy Design

Structure Design

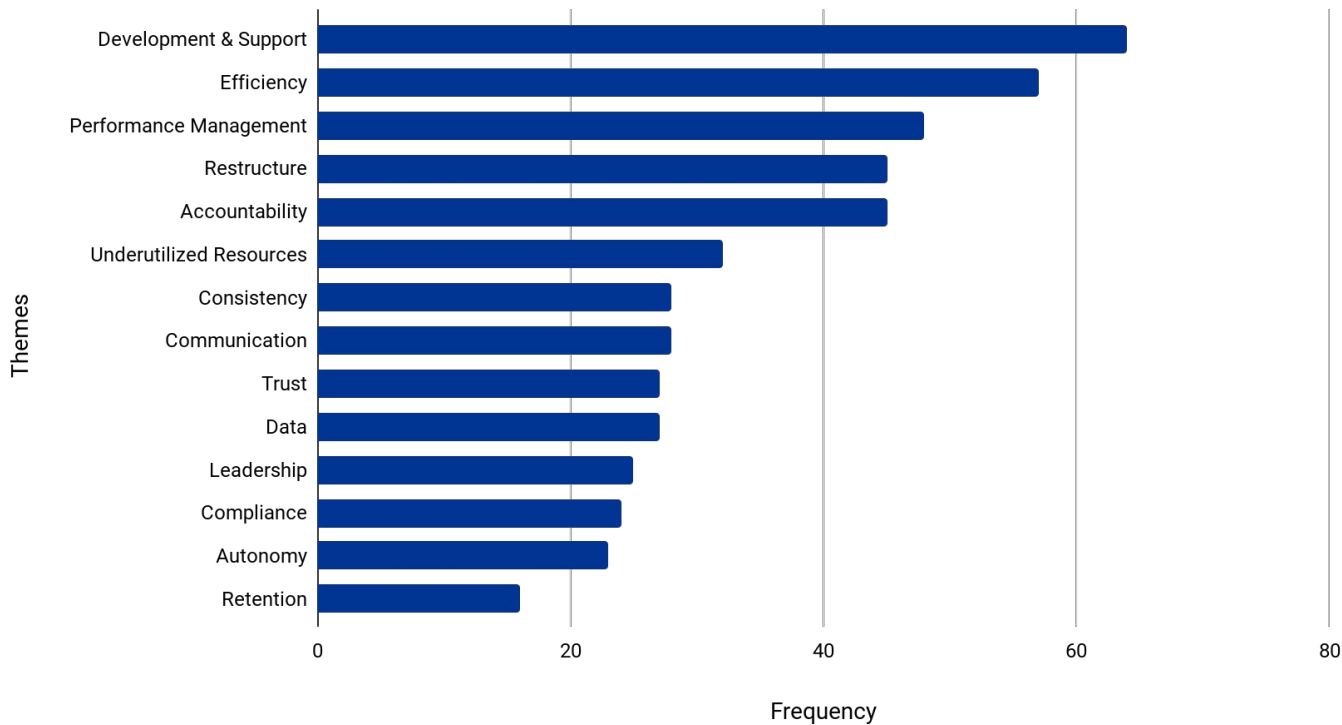
Systems  
Recommendations

Implementation  
Plan

Additional  
Services

The table of contents above is hyperlinked, hover and click to move to a desired section

# What We Heard



Opportunities

Philosophy Design

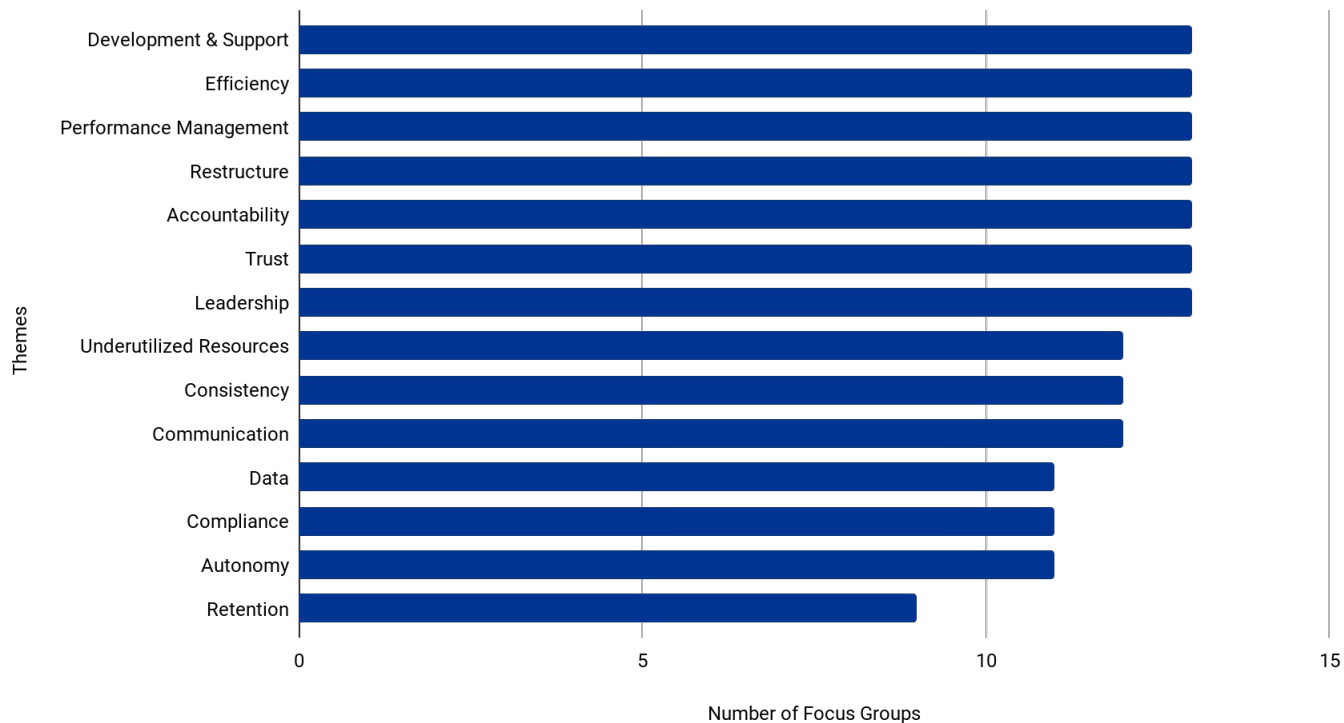
Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

# How Often We Heard It



Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

# Sounds Like...

"I'm fine with holding my staff to expectations, but if there isn't a clarity, that's hard for me to do."

"It used to be manageable. The culture makes it hard to manage."

"It's like feast and famine. I sometimes worry I don't have enough work."

"There's not enough support. People have quit because it was too overwhelming"

"No two years have been the same."

"Accountability is missing. We need equitable accountability at all levels. Everything sits with the top."

"I don't have any opportunities for autonomy. I thought I'd have more but that was shut down."

"We need clearer expectations. Nobody knows what the gold standard actually means."

"The old structure wasn't bad, we were just lacking accountability and in some ways we still are."

"I know we're collecting data from our families about their experience, but no one has ever shared my data with me."

"Who can I go to with my questions? It's not clear."

"I haven't talked to my principal all year."

"We talk a lot about working smarter not harder, but we don't allow people to become specialists in their craft."

## Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

# Trending Sentiments

## Lack of Trust is Up

Staff cited concern that leadership lacks an understanding of programs and teacher experiences, leading to a lack of confidence in decision making.

Many named missed opportunities to take the reins in their roles and a feeling of not being trusted to get the job done without major oversight.

## Autonomy & Support On the Decline

Staff cited a lack of autonomy in their roles at all levels, despite their experience in the field.

Increase in compliance-focused tasks without clear rationale or an inclusive process has led to low buy in and ineffective change management.

# Trending Sentiments

## Underutilized Resources

Domain experts, coaches, and available data are not leveraged to provide targeted staff support.



## Gaps in the Support Structure

To achieve the Gold Standard, staff need individualized trainings and clear lines of communication.



## Inefficient Workflows

Staff are experiencing decision paralysis and over communication due to lack of clarity on roles, responsibilities, and accountability.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Silver Lining: Deep Commitment to Mission

Staff are feeling underappreciated, micromanaged, and unsupported rather than trusted to do their jobs.

**However, the support they provide for families and scholars keeps them working hard** even though the culture, constant change, and communication overload are wearing them down.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



# COMPASS CHARTER SCHOOLS



**Opportunity #1:**  
Redefine the Gold Standard

**Mission:** Our mission is to inspire and develop innovative, creative, self-directed learners, one scholar at a time.

**Vision:** Our vision is to create a collaborative virtual learning community, inspiring scholars to appreciate the ways in which arts and sciences nurture a curiosity for life-long learning, and prepare scholars to take responsibility for their future success.

**Core Values:** Achievement, Respect, Teamwork, Communication, Integrity

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



## Opportunity #1: Redefine the Gold Standard

### Implications:

- **Performance:** Staff aren't clear about what it means to hit the bar, and so they aren't hitting the bar.
- **Decision Making:** Staff aren't able to prioritize with alignment on what matters most.
- **Resource Allocation:** Without clarified priorities, it's tough to know where capacity is most needed, and as a result staffing decisions rely heavily on the people in each role.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



## Opportunity #2: Rebuild Community

**Mission:** Our mission is to inspire and develop innovative, creative, self-directed learners, one scholar at a time.

**Vision:** Our vision is to create a **collaborative virtual learning community**, inspiring scholars to appreciate the ways in which arts and sciences nurture a curiosity for life-long learning, and prepare scholars to take responsibility for their future success.

**Core Values:** Achievement, Respect, Teamwork, Communication, Integrity

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



## Opportunity #2: Rebuild Community

### Implications:

- **Morale:** Staff energy takes a hit without built in opportunities for support.
- **Productivity:** Staff aren't getting quick responses on decisions as leaders seek alignment before looping back with staff.
- **Capability:** Without direct lines to expertise, staff are missing opportunities to deepen their skill set.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

# COMPASS CHARTER SCHOOLS



## Opportunity #3: Refresh Core Values

**Mission:** Our mission is to inspire and develop innovative, creative, self-directed learners, one scholar at a time.

**Vision:** Our vision is to create a collaborative virtual learning community, inspiring scholars to appreciate the ways in which arts and sciences nurture a curiosity for life-long learning, and prepare scholars to take responsibility for their future success.

**Core Values:** Achievement, **Respect, Teamwork, Communication, Integrity**

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



### Opportunity #3: Refresh Core Values

#### Implications:

- **Brand:** Without alignment on what it means to embody the core values, staff, scholars and families are likely to have varied experiences with the organization.
- **Recruitment:** Without buy-in around the core values, staff, scholar and family attraction tactics are likely to be challenged.
- **Accountability:** If core values aren't baked into the fabric of the organization, it's harder to hold staff accountable to culture expectations.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

# Our Process

**Advisory Task Force:** We convened a cross-section of staff to develop a set of guiding principles to inform our design work. We were intentional about including individuals who have diverse perspectives and varied levels of tenure, positioning and expertise.

**Continuum of Values:** We provided the advisory task force with 3 scales and asked them to consider scenarios where implicit values are at play in order to determine the path forward. We asked what should Compass value and how should that show up? Our goal was to determine whether Compass leans heavily on one side of the spectrum, or whether a more balanced approach was preferred.

- Relationship or Data (achievement) Orientation
- Compliance or Development Culture
- Consistency or Flexibility Model

**Philosophy Design:** We leveraged the task force discussion to develop a guiding philosophy and make revisions to our initial structure recommendations. We pressure tested key decision points with the task force.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

Relationship  
Orientation

Staff  
Experience

3.25

Data  
Orientation

**Balanced, with slight emphasis on data.** Staff expressed the need for a structure that's metric driven, but only to an extent. There is a clear preference for a relationship-focused culture to balance out the need to keep a pulse on the data and deliver measurable results for the scholars they serve.

**Both are extremely important** but without high standards of data orientation we could cease to exist as a school.

I care about the staff's ability to **maintain a personal connection** with their scholars. But they need to **be aware of the data** that is being produced by that scholar.

**I ultimately think we need a balance** between the relationships and data. Knowing we are a public charter school, data is important to show growth for stakeholders and authorizers, however, to make those data gains, we need to foster those relationships.

**Data is important** and it serves a purpose, we do need it to drive what we do, **but families, scholars, staff are going to respond more to the relationships.** If the relationships and feelings of satisfaction are there, it will open the door to be more receptive to the data and how to utilize it.

**High relationship oriented** staff support **and data orientated** achievement rating would benefit the organization as a whole.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services



Relationship  
Orientation

Staff  
Experience

3.25

Data  
Orientation

**Balanced, with slight emphasis on data.** Staff expressed the need for a structure that's metric driven, but only to an extent. There is a clear preference for a relationship-focused culture to balance out the need to keep a pulse on the data and deliver measurable results for the scholars they serve.

### Key Problems to Solve

- **Meaningful Orgwide Metrics** - Align on a common, measurable definition of success that shows a better balance of authorizer/state requirements and relationship culture. Clarify the gold standard in a way that balances the success and satisfaction of scholars, families and staff. Don't make decisions based on traditional success metrics alone. Keep a pulse on satisfaction and make adjustments that reflect this balance.
- **Better Feedback Mechanisms** - Ensure staff are receiving metric-driven feedback about their performance with a balanced scorecard that demonstrates their ability to create impact and maintain relationships. Both teaching and nonteaching staff should be held accountable for their impact on the work and on one another.

#### Systems Barrier

Performance Management is not clear or holistic.

#### Structure Barrier

Managers are stretched too thin across content and direct reports.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

Compliance  
Culture

Staff  
Experience

3.25

Development  
Culture

**Balanced, with slight emphasis on development.** Staff expressed the need for a structure that keeps the organization in good standing, while making space for people to learn and grow. There need to be more intentional systems to ensure Compass is a place where staff can develop their craft.

**I would love to see a shift** from a compliance culture to that of a development culture. Generally, I feel it would be beneficial to our stakeholders and support our mission, vision, and values if we were able to take a more proactive role in continual improvement (development).

Though normally I would lean toward development, there is a **lack of accountability and compliance** at Compass that requires more of focus in that area.

A component to building trust is the compliance piece, however, this is just one aspect. I also **think we need a balance** between evaluation/accountability and development.

If STs have **clear expectations** of what their job tasks are and support from their managers, the **compliance issues will fall into place.** The development needs to be relevant to their specific job duties/tasks/purpose.

**I care about both of these fairly equally.** There are many rules and regulations regarding compliance that need to be followed. There are also many new opportunities that are available that would benefit us and set us apart from the other virtual charter schools. To me these are equally important.



**Balanced, with slight emphasis on development.** Staff expressed the need for a structure that keeps the organization in good standing, while making space for people to learn and grow. There need to be more intentional systems to ensure Compass is a place where staff can develop their craft.

**Key Problems to Solve**

- **Coaching & Training** - Allocate staff & capacity to focus on building knowledge, skill and mindsets across Compass staff. Remove ineffective uses of time (irrelevant meetings) to make space for timely development & support.
- **Meaningful Collaboration & Mentorship** - Develop opportunities for proactive departmental and cross functional collaboration. Ensure staff have access to leaders who are equipped to provide on the job functional learning.

**Systems Barrier**

Lacking the feedback metrics needed to identify trends in development needs.

Current development often irrelevant for segments of staff

**Structure Barrier**

Coaching staff stretched too thin with caseload work.

- Internal Findings
- Opportunities
- Philosophy Design
- Structure Design
- Systems Recommendations
- Implementation Plan
- Additional Services

Consistency  
Model

Staff  
Experience

3.5

Flexibility  
Model

**Balanced, with slight emphasis on flexibility.** Staff expressed the need for a structure that provides both continuity and agility. There is a desire for commonality where it makes sense, but an intentional lens of differentiation to keep people feeling supported.

There is never going to be a 1 size fits all with an org this size and diverse. **We maintain the upper hand by being flexible.**

I think this consistency model also relates to the compliance/evaluation piece that has shifted culture this year. **When we are too specific, then we create gaps** in support for staff and scholars.

You may also have expectations, that I believe in one department need to be consistent, however, **if we are crossing departments, it gets tricky.**

**This is also something in the middle for me.** We do need to be consistent in many ways to ensure our scholars are receiving the same education and support but we also need to be flexible as not all of our scholars are leering the same way, and our teachers need the flexibility to adapt to the different learning styles of our scholars.

We ask staff to be flexible to the needs of scholars and we should be able to **do the same for staff**

Fixed and consistent job descriptions can possibly make it easier to align goals. **I can see the need for a flexible model** between learning programs, certified, and classified staff.

I see a great value in both models - our **staff is asking for consistency from administration**, whether it is the org chart to job descriptions and duties. I feel that they deserve that.



**Balanced, with slight emphasis on flexibility.** Staff expressed the need for a structure that provides both continuity and agility. There is a desire for commonality where it makes sense, but an intentional lens of differentiation to keep people feeling supported.

**Key Problems to Solve**

- **Clear, Accurate Job Descriptions** - Align on the scope of work and leave it in place throughout a school year. If job descriptions need to change, provide staff with an updated contract, an adjusted salary, and new expectations & metrics.
- **Strategic Staff Groupings** - Ensure staff and scholars are grouped in a way that promotes both consistency across departments and easy adjustments to meet stakeholder needs. Remove department groupings that prevent quick decision making from leadership.

**Systems Barrier**

HR staff is too limited to own JD/salary updates. Managers have not been trained to do this equitably.

Scholars aren't assigned strategically and staff expertise is often not well matched.

**Structure Barrier**

Team divisions creating inefficient workflows.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Compass Talent Management Philosophy

**Clarity.** Each staff member knows what role they play in the success of our staff and scholars. We value teamwork, and provide clear, written expectations and metrics to help staff understand gold standard performance for their role. We set ambitious but achievable goals and minimize major changes in the middle of the school year.

**Autonomy.** We trust our staff to deliver gold standard results and we trust our department leaders to run their programs with a balanced focus on achieving results and care for staff. We value flexibility and empower them to make decisions to meet the needs of scholars and staff.

**Accountability.** With deep autonomy, comes great responsibility. Staff are held responsible for results in both achievement and stakeholder satisfaction. We are passionate about progress, and we care about *how* we get there. We value relationships and ensure that core belief is evident in our work.

**Growth.** We believe in growth mindset and expect people to learn as we go. We provide scholars with all the tools they need for success, and we do the same with staff. When our staff and scholars struggle, we support them because we believe in them. We expect improvement once support has been provided and move proactively because our mission is urgent.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

## Restructure Guiding Principles

**The key deliverable for our work together is to provide recommendations on the structure that would best position Compass to achieve their mission.** We aligned with the CEO on how he'd like to operate in the event shifts were needed to the structure. The two principles below emerged as critical.

1. **Job Security.** The purpose of this study is to determine the most effective path to achieving our mission. The goal is not to downsize or remove people from positions. Compass commits to finding space in the new structure for all staff who wish to stay on the team. If role shifts are needed, no team member will be penalized financially.
2. **Growth Mindset.** We will honor our belief that people can grow into new opportunities with clear goals and expectations. When determining who is best positioned for a new role, we will consider who is best positioned/most proximal to the work and give them a chance to lean into the role. We will support staff in taking on new responsibilities with intentional training and coaching. When the best positioned staff member is not interested, we will open up opportunities to other staff members to apply for new positions.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

These decision points emerged from our stakeholder interviews and philosophy design conversations.

Edgility has provided a structure recommendation that solves for these concerns and aligns with the 4 pillars of the Compass Talent Management philosophy: Clarity, Autonomy, Accountability, and Growth.

The task force evaluated each of these and recommended the implementation of all 7 over a phased timeline. A summary of their feedback can be found below the charts. The CEO fully agreed with their recommendation.

Decision Points		
<b>1. Reduce CEO Mgmt Load</b> so that the Cabinet remains high level, keeping pulse on the big picture, reducing micromanagement behaviors.	Yes	No
<b>2. Reduce CAO Mgmt Load</b> so that there is increased availability for hands on coaching and development of department leadership.	Yes	No
<b>3. Restructure Program Model</b> so that there is increased autonomy and responsive decision making in the day to day aspects of each program.	Yes	No
<b>4. Restructure Ops Staff</b> so that there is a more holistic conversation about the infrastructure of the organization.	Yes	No
<b>5. Restructure Support Staff</b> so that there is more holistic conversation about the differentiated supports needed for staff & scholars.	Yes	No
<b>6. Redesign Workloads of Coaching Staff</b> so there is more capacity for timely support and training. (mgrs & staff with coaching responsibilities)	Yes	No
<b>7. Reimagine ST Assignments</b> to operate in weighted system so there is better alignment to strengths, content areas and workloads to reduce need support needs.	Yes	No

Internal Findings

Opportunities

Philosophy Design

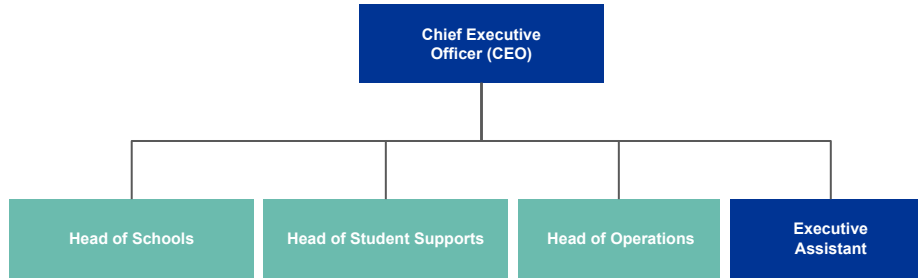
Structure Design

Systems Recommendations

Implementation Plan

Additional Services





Internal Findings

Opportunities

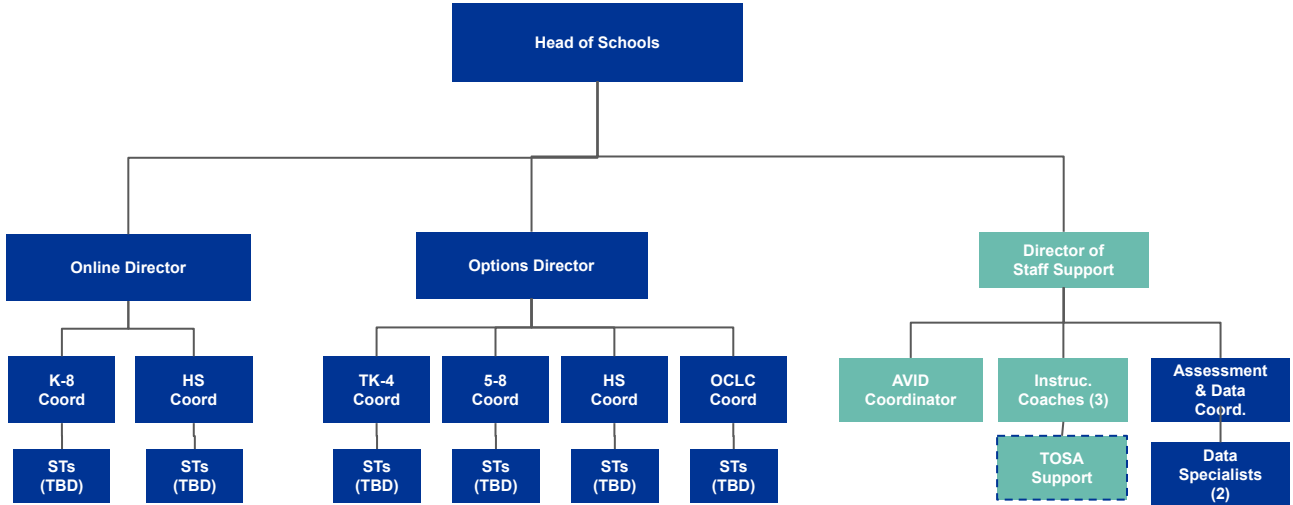
Philosophy Design

Structure Design

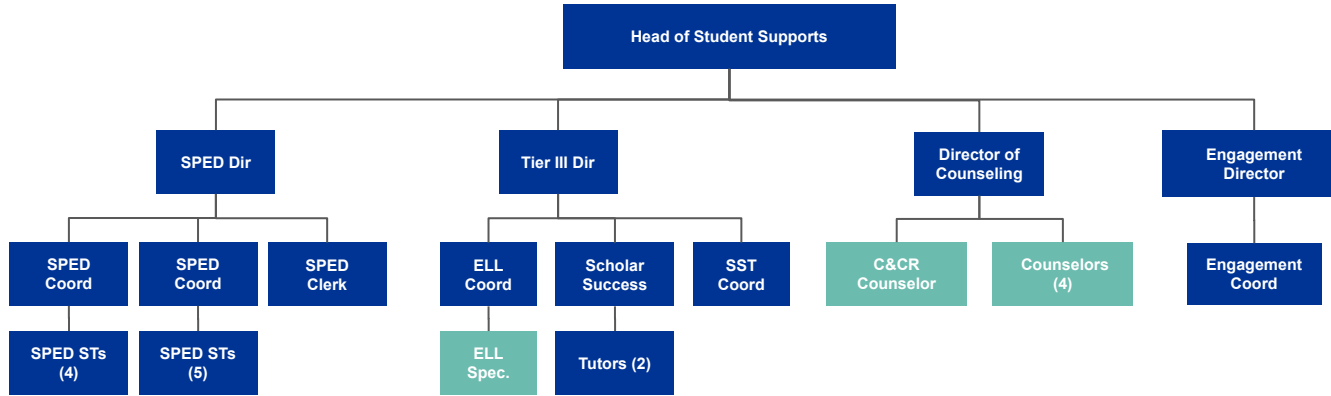
Systems  
Recommendations

Implementation  
Plan

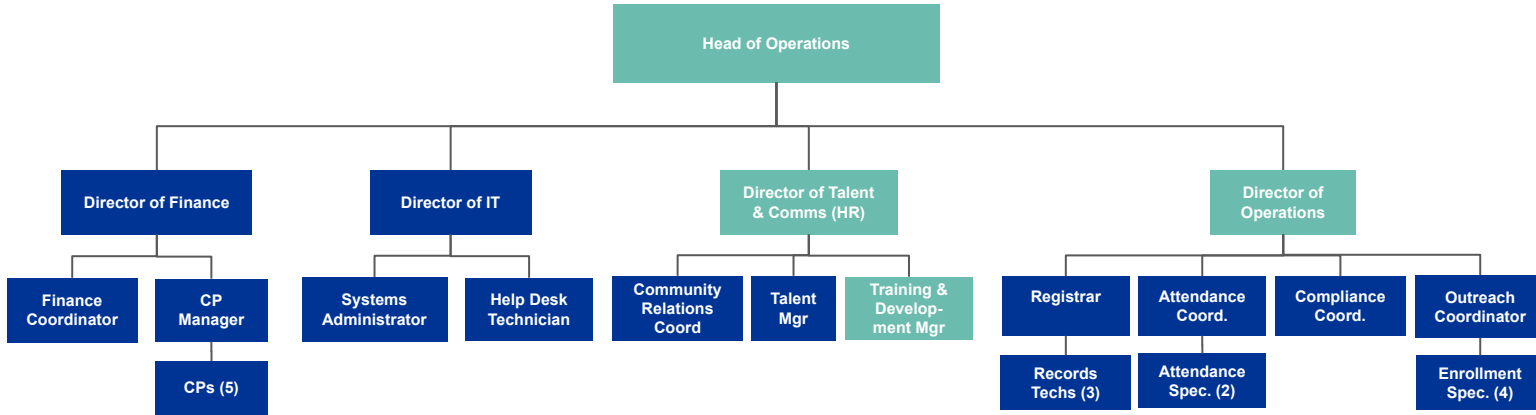
Additional  
Services



- Internal Findings
- Opportunities
- Philosophy Design
- Structure Design
- Systems Recommendations
- Implementation Plan
- Additional Services



- Internal Findings
- Opportunities
- Philosophy Design
- Structure Design
- Systems Recommendations
- Implementation Plan
- Additional Services



Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Structure Feedback

Decision Point	Pros	Cons
<b>1. Reduce CEO Mgmt Load</b> so that the Cabinet remains high level, keeping pulse on the big picture, reducing micromanagement behaviors.	Pulls the CEO's work up an altitude and that would be welcomed.	Most have no concerns, others worried about communication gaps and not enough oversight to catch problems in a timely manner, one voiced concern about adding levels of leadership.
<b>2. Reduce CAO Mgmt Load</b> so that there is increased availability for hands on coaching and development of department leadership.	In general there's alignment that splitting CAO into two big buckets of work makes sense	A few had no concerns, repeat concern about levels of leadership, ambiguous titling, felt sense of demotion, potential for overstaffing, potential for communication gaps with school based and support staff, move staff development to the program side and make retitle as Chief of Scholar Supports, Need staff dedicated to Curriculum
<b>3. Restructure Program Model</b> so that there is increased autonomy and responsive decision making in the day to day aspects of each program.	This will make people feel heard and addresses the concerns raised throughout the process.	A few have no cons to name, others concerned about fair, balanced workloads across directors, lack of accountability in previous structure makes it hard to see how this could work, concern about the grade level split (need to make a decision on ST assignments favoring family connection vs ST expertise and development), recommendation to split options 6-12 instead of TK8
<b>4. Restructure Ops Staff</b> so that there is a more holistic conversation about the infrastructure of the organization.	Better synergy and oversight across groups, better work distribution, much needed support for compliance	Some concern about who leads this group, Need clear communication around the SST role being redistributed, Need to clarify the current director of operations is doing the director of compliance role, clear roles and responsibilities (projects like LCAPs), where does the Accountability Coordinator sit (did not intentionally eliminate)

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Structure Feedback

Decision Point	Pros	Cons
<b>5. Restructure Support Staff</b> so that there is more holistic conversation about the differentiated supports needed for staff & scholars.	overwhelmingly positive sentiment that this will be beneficial for staff	Questions about the need for A-G support, need for clear communication, need for clear responsibilities, budget, need to clarify AVID coordinator (had mixed reviews from staff, not as helpful as adding support in other areas), turn around time with data
<b>6. Redesign Workloads of Coaching Staff</b> so there is more capacity for timely support and training. (mgrs & staff with coaching responsibilities)	overwhelmingly positive sentiment that this would set people up for success and make support more felt	Concern about coaching without doing disconnect, need more clarity, budget, staffing,
<b>7. Reimagine ST Assignments</b> to operate in weighted system so there is better alignment to strengths, content areas and workloads to reduce need support needs.	Overwhelmingly positive sentiment that this would lead to happier, more effective, efficient instruction	meaningful ratios, budget, supply/demand, repeat concern about family vs expertise assignments being a barrier, communication through the adjustment phase

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Recommendations

In addition to the staffing restructure recommended above, Edgility recommends that Compass prioritize the following to address the 3 opportunities that surface in our discovery process. To effectively pursue their their mission, Compass needs to:

1. Redefine the Gold Standard
2. Rebuild Community
3. Refresh the Core Values

1. **Clarity:** Clarify job descriptions. (1) The What, (2) The Why, (3) The How and (4) For Whom
2. **Milestones:** Set measurable goals on outcomes not inputs. Clarify success at the end of the year and along the way.
3. **Autonomy:** Provide decision & workflow guidance with clear lanes for ownership and accountability.
4. **Development:** Build systems for meaningful evaluation, feedback and growth. (1) Annual Reviews, (2) Training & Onboarding and (3) Coaching
5. **PLC Spaces:** Develop meaningful cross-collaboration opportunities to improve synergy across programs and functions.
6. **Business Process Reviews:** As a leadership team, set regular touchpoints to look at the big picture, including an assessment of your process-core values alignment.
7. **Simplify Communication:** Reduce the number of forums where information is shared. Develop a cascading protocol. Clarify meaningful meeting structure.
8. **Integrity Based Accountability:** Tailor management tactics to staff members. Tier based on performance/experience and differentiate support so that the staff who need support can receive it.
9. **Safe System for Reporting Inequity:** Develop a safe, meaningful platform for staff to voice concerns.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services

## Implementation Needs

We met with the leadership Cabinet to determine what must be in place for this structure to have the intended impact.

They surfaced these key needs as priorities, which align well with Edgility's system recommendation.

**Right people in place** - these roles require skilled leaders who can connect with staff. We have to be thoughtful about how we move people into roles.

**Ownership to make autonomy happen** - this is a two way street. We need leadership to clarify where they'd like to be strategic collaborators, and where people should have full decision making authority. When decisions are made in those areas, you have to let people live them out, even when you don't agree. That's how you achieve accountability.

**Clarity on the Big Rocks** - What is the gold standard for each role? What goals matter most for the organization? How do they trickle to each team? What metrics best represent those goals? What are the benchmarks and milestones that people need to hit to be successful in their roles?

**Staff Development**- What is your process for developing staff and growing their skills to take on new work? There is a culture of home grown talent, that is not supported by any systems or structures. Believing in staff's ability to grow is an important part of the puzzle, but there are missed opportunities to invest in building capability.

**Collaboration** - No matter the structure, there need to be clear expectations for collaboration. What does it look like for peers at each level to align on best practices and thought partner?

**Performance Management** - What qualifies as good performance? How should managers handle underperformance? When is it appropriate to coach someone out or initiate separation? What is the process for that? How do you get a better balance between accountability and support?

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services



## Implementation Flow

Edgility advises Compass to implement our recommendations with the following order of priority.

### Summer 2021

- **Systems:** Provide clear job descriptions for current roles, outline expectations for autonomy and accountability.
- **Systems:** Define Gold Standard for 3 functional areas (schools, student support, operations). Set clear metrics and progress milestones.
- **Systems:** Simplify communication by reducing the number of forums where information is shared. Develop a cascading protocol. Clarify meaningful meeting structure and consider implementing skip level manager meetings.
- **Systems:** Clarify manager expectations. When should a team member receiving coaching versus written write ups? At what point should separation be considered?
- **Structure:** Reduce CEO headcount with the exception of HR Director.
- **Structure:** Implement the program model restructure - move to Options/Online model and find new roles for current school leaders & coordinators. Do not force grade level groupings, but use where applicable.
- **Structure:** Hire Training & Development Manager (look internally first).

### Fall 2021

- **Systems:** Complete Business Process Review to identify areas of core values misalignment.
- **Systems:** Build systems for meaningful evaluation, feedback and growth. Clarify interests and gaps in skills/orientations. (1) Annual Reviews, (2) Training & Onboarding and (3) Coaching
- **Systems:** Develop meaningful cross-collaboration opportunities (PLCs) to improve synergy across programs and functions.

### Spring-Summer 2022

- **Structure:** Match current talent to roles in the new structure. Provide updated job descriptions when responsibilities change. Hire for positions where internal talent is not well positioned for the role.
- **Structure:** Implement new structure. Use a tiering system to assign STs based on skill set groupings, not family connections. Implement a thoughtful handoff that embodies relationship-centered leadership.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems Recommendations

Implementation Plan

Additional Services

## Edgility Proposal for Implementation Support

Summer  
2021

### **Job Description Revamp (5-10K)**

Work with people managers to clarify the key buckets of responsibilities, required competencies and corresponding goals for each unique role in the organization.

### **Revamp Performance Management System (10-15K)**

Clarify most critical orgwide goals and how they trickle to each department. Determine how to incorporate core values and relationship orientation into the system that holds staff accountable for results.

### **Revise Infraction Guidance (3-5K)**

Work with HR team and program leaders to develop a system for managing underperformance. Clarify when to coach people through vs coach people out.

Other  
Opportunities  
for Support

### **Cabinet Retreat (5-7K)**

Conduct a Business Process Review to evaluate misalignment with goals and core values...to step back and review the big picture and identify the root causes of recurring issues, including a meetings audit to determine the purpose and recommended agenda topics for various orgwide meetings. Clarify how the team will collaborate and keep each other in the loop going forward.

### **Establish Learning Communities (3-5K)**

Work with department leaders to develop a system for cross and interdepartmental collaboration that's valued and leveraged. Work with Program Leadership to implement a mentoring program.

Internal Findings

Opportunities

Philosophy Design

Structure Design

Systems  
Recommendations

Implementation  
Plan

Additional  
Services