

COLLABORATING IN A **CRISIS**



*Ensuring Educator Voice
When it Matters Most*

A QUICK-START GUIDE TO COLLABORATING EFFECTIVELY IN A **CRISIS**

🖱️ Click the steps below to jump to more information on each.

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Listen to Members' Needs

How is the situation impacting them? Their students and families? The community at large?

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Establish Support Resources

Identify and secure the resources that are required to help you achieve your goals and objectives.

2



Partner with Administrators

Identify the crisis, communicate your desire to collaborate, and partner to develop and implement solutions.

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Create a Communication Plan

It's important to keep your stakeholders informed. Determine how and when you will communicate the work.

3



Create Commitments

Identify areas of focus that all parties agree are a priority. Document these areas and agree to hold to these.

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Understand Decision-Making

It's important to establish decision-making that protects the integrity of the work and the collaborative dynamic.

4



Form Teams & Committees

Work with administrators to form teams and committees with diverse, ready-to-collaborate stakeholders.

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Monitor Progress & Impact

This helps track implementation and may also shed light on new information about problems or solutions.

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Create Shared Goals Objectives

Define and document shared goals and objectives, and the activities that will achieve those aims.

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Reflect. The crisis has ended!

Think about the important structures you've established as you look towards a brighter future.

A crisis has hit. People need help and you want to act quickly. Formality and precision must move aside so that immediate responsiveness can take precedence. There is a lot happening at once, a lot that is uncertain, and many people are affected. So, how do you respond?

As a local leader, your response must be immediate and effective. You do not have the usual luxuries of time and forethought, and you are in a new situation where you must represent your members' needs during a time of crisis. One of the most effective ways to do this is to engage with administrators in collaborative decision-making processes. By working with administrators and our members to co-create solutions that are in the best interest of educators, students and their families, you can help to ensure that responses to this crisis are targeted and address the most urgent needs.

Those closest to the situation are best positioned to be part of the solution. Who knows the needs of our students and their communities better than our members, the educators that are with them every day? As local leader, you are positioned to create a space for members to create solutions for what is needed for educators, students and their families. You are also positioned to propose members join administration and share in the decision-making around what is best on behalf of our nation's schools and students. The benefits of educators collaborating with administrators have been well-documented and the power and efficiencies of these partnerships will push your response efforts faster and further to those in need.

These are unprecedented times.

We are overloaded with information. It is sometimes hard to have a good grasp of the situation and fully understand what is ahead of us. Now more than ever, people are looking for trusted leadership, a way forward, and for solutions that work. This resource guide will provide quick-start processes for you and your members to work alongside administration to bring forth the needs of educators, students, and their families, and to address them in ways that bring swift outcomes.





First, Listen

It's tempting to rush to solution-building in a crisis, but it's wise to look before you leap. It's important to understand the context and the circumstances surrounding the crisis. Particularly, you want to make sure you have a pulse on how your members and potential members feel about the situation.

Keep an eye toward equity in your listening and consider these questions about your members and the crisis:

- How is it impacting them?
- How is it impacting their students and families?
- How is it impacting the community at large?
- How are already-disadvantaged populations experiencing this crisis differently than others?
- How do needs differ across various groups within your community?

LISTENING STRATEGIES MAY INCLUDE:



TOWNHALLS



COMMUNITY
MEETINGS



CONFERENCE
CALLS



QUESTIONNAIRES



SOCIAL MEDIA
ANALYSIS

Identify the listening strategies you can use to take the pulse of your community circumstances. The purpose of your listening mechanism is to give you enough information to credibly speak out on the community's needs and priorities. You need to be able to truthfully say, "We've heard the voices of educators and the community, and these are the immediate needs."

Listening first also offers an opportunity to gather your coalition before approaching the district. In times of crisis, there are many stakeholders who likely want to be included in the solution-building. The association, with its strong network and organizing capabilities, is often in a good position to spearhead the community contributions.

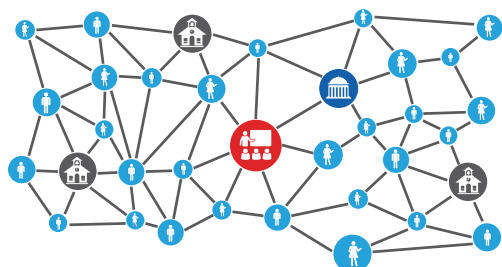


Partner with Administrators

Right now, administrators are looking for answers in a time when they might not be readily available. You know that bringing your members – those closest to students and families – into the response planning work is smart, but how do you quickly convince administration of the same?

DID YOU KNOW?

In collaborative environments, the association's natural network facilitates sharing of innovative practices across schools and districts.



If you've already established a cooperative relationship with administration, now is the time to take this guide and work together to establish leadership teams and working groups to address issues as soon as possible. If you and your affiliate have a checkered history with administrators, a crisis can become a defining moment that can open the door to a new path forward and a lasting culture where member voice is heard.

Think about how you will approach administrators. Use what you know about Labor-Management Collaboration to present

a compelling argument and show the benefits of cooperative discussion and decision-making. Since time is crucial, you might want to get to the point quickly and ask administrators to form a committee and for members to be part of the team. You must be sure to have members identified who are willing to participate in solution-building so that once you have agreement from administrators, you are ready to take action. Be sure to identify a diverse group of members ensuring experience and viewpoints from all stakeholders in the system. Does your affiliate have a strong connection with parents and the community? If so, it would be very important to have their representation as well during this time of crisis.

In summary, when approaching administrators to form collaborative partnerships during a time of crisis, you should:

- Identify the crisis & communicate your desire to help be a part of the solution.
- Present the benefits of collaboration and shared decision-making (educators' knowledge of students' needs makes for better problem-solving with administrators and other partners). For a one-page infographic detailing more of the benefits of collaboration, see page 21 of the guidebook [**Collaborating for Student Success.**](#)
- Suggest the immediate creation of a task force or committee (or one oversight committee and a set of working committees) to develop and implement solutions to the crisis at hand



Create Commitments

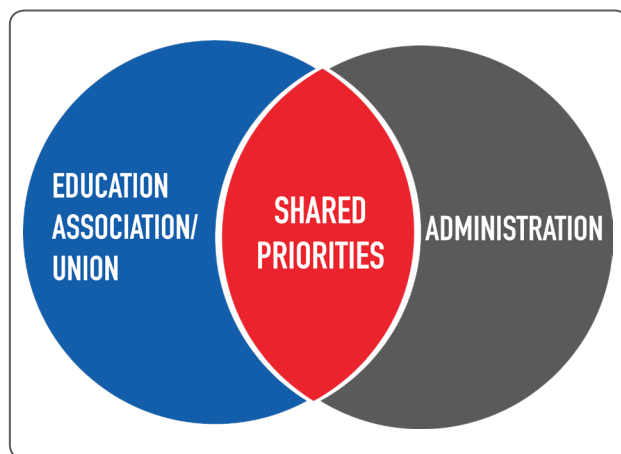
In crisis mode, decisions need to be made fast. Distributive leadership models tap into expertise at all levels of the system and help to empower those on the ground to take

quick action in pursuit of goals. In this stressful situation, administrators may welcome a broader decision-making capability and the opportunity to access diverse knowledge and expertise throughout the ranks.

Trust may or may not be the nature of your current relationship with administration. But for this moment, you are looking to come together with a common purpose of focusing on what is most important for dealing with the crisis affecting your students and schools.

Start with what you as an association have to offer your district in this time.

- How are you able to activate your association's already-established network of educators to help solve the problems at hand?
- What resources are you able to contribute?
- In order to do so, what commitments do you need from the district to be successful?



Have this discussion with administrators. **Identify areas of focus that all parties agree are a priority and worth pursuing.** Document these areas and agree to hold yourselves and your partners to these agreements. You might find that these agreements and commitment to work together can help to reduce anxiety and fear, bringing a degree of comfort to those effected by the crisis. Consider making a formal announcement of your commitment to the community.



Form Collaborative Teams & Committees

It is important to establish collaborative roles, even in a time of crisis. Collaboration works well when there is a leadership team to guide the work and a working committee, or committees, to implement the work. Once you have made a commitment to work together, you should establish the following teams:

Crisis Leadership Team (CLT): District level team comprised of administration, union leadership, and others. Guides committees through problem solving and sets goals of its own.

Crisis Response Committees (CRC): Working teams comprised of members, administrators and others. Established to address issues of urgency and create solutions to be implemented.

Work with your administration to populate these committees with a balance of administrators, educators, and community members. This is an opportunity for you as a local leader to increase the opportunities for member engagement and leadership. Those best-suited to serve on these committees may or may not be the traditional elected leaders in your local association. Those who you see stepping up to leadership during a crisis may or may not be the “usual suspects.” Be on the lookout for those most eager to contribute and be open to engaging new people in new ways. And, ensure you have people on these teams with knowledge about the unique needs of your most vulnerable populations.



Create Shared Goals and Objectives

The foundation of your Crisis Response Plan relies on an overarching **goal**. A goal is the desired result that your team hopes to achieve within a certain amount of time. It tells you where you want to go and by when. Work with CLT members to agree on a goal. All must agree that the goal is a priority and must be willing to work towards that goal. Your plan may have more than one goal. Document your goals in a place where they can be easily accessed by any member of your CLT and CRC members.

A goal is stated in terms of the desired outcome within the designated timeframe. For example, the goal might be “Transition our education delivery to online/distance platforms within three weeks.” Another goal might be “Ensure our students and their families receive the services they are entitled to for having their basic needs met.”

For each of your goals, you will also write objectives. **Objectives** are the measurable criteria you’ll use to determine whether you have achieved your goal. This is where action truly begins as you define what steps will you take to achieve your goal(s). If goals

CHARACTERISTICS OF COLLABORATIVE TEAMS

Awareness: Team members see themselves and each other as necessary parts of a working system.

Motivation: Team members have the drive to gain consensus when engaging in join problem solving.

Goal Alignment: Team members seek to align goals among stakeholders by emphasizing common purpose and shared priorities.

Psychological Safety: Team members create an environment where all partners feel comfortable sharing thoughts and opinions, and where they are not judged harshly for mistakes, voicing concerns, or holding unpopular opinions.

Social Support: Team members portray each other as valued partners to their peers.

Mediation: Team members are able to positively negotiate and get to an agreement.

Reliability: Team members are reliable and can depend on each other to follow through on commitments.

For an expanded list, check out pages 76-77 of the Collaborating for Student Success guidebook, available for [download here](#).

tell you where you want to go, objectives tell you exactly how to get there. Well-written objectives specify what you must do, the timeframes in which to do them and your available resources for the work. Because objectives are measurable, they are used to evaluate progress towards goal achievement.

When writing objectives, try to make them:

- **Specific** – clearly identify what will be done, and what you want to accomplish
- **Pertinent** – the objective is based on current conditions and needs
- **Realistic** – ensure that the results can realistically be achieved given available resources
- **Data-informed** – ensure your result can be evaluated against a standard, in terms like quantity, quality, frequency, etc.
- **Time-bound** – specify when the result(s) can be achieved

Using our examples of goals from the previous page, the supporting objectives might be as follows:

Goal: Ensure our students and their families receive the services needed to have their basic needs met within one week.

Objective 1: Ensure our students who are eligible for free meals receive those meals starting in the next 48 hours.

Objective 2: Ensure our students needing disability services receive those services within the week.

Objective 3: Inform all affected individuals of appropriate relief websites within the next 72 hours.

Goal: Transition our education delivery to online/distance platforms within 3 weeks.

Objective 1: Ensure 1:1 devices and connectivity for all students within 3 days.

Objective 2: Develop distance learning plans for preK-12 within 10 days.

Objective 3: Train and support educators in adjusting pedagogy to deliver distance learning to begin within 3 weeks (through the end of the school year).

Well-articulated objectives also help teams monitor their progress because they detail the steps needed to realize the goal. At any point along the journey, the group can evaluate its work compared to its objectives to understand their progress. The plan should also set milestones, or points when a certain activity or set of activities should be completed. If the team has not met a milestone by the designated date, they should either make adjustments to accelerate their work or adjust their objective.

Perhaps one of the most important reasons for objectives is to keep all of the moving parts going in the right direction and knowing when one piece of work is complete so you can move onto the next piece of crisis management work. Things are likely moving very quickly and each moment new challenges will arise. It is important to keep focused and keep your eye on the ball so that you can continue to make strides while so many distractions are happening. This crisis is most likely unknown territory, so setting goals and objectives will serve as a constant reminder of what needs to happen.

Do not be afraid to edit your goals or objectives if the situation changes or if you learn new details which change how you will deal with things. Be sure that your goals and objectives are in a place where everyone on your CLT and the CRCs can see them and can be made aware of any updates. It may be a good idea to elect a team member to shepherd the goals and objectives while activities take place.

When applicable, assign each objective to a CRC to tackle. This strategy allows the web of committees to work simultaneously on different aspects of the crisis at hand which positions you to solve problems and implement solutions most efficiently. Each committee should be given its own objective(s) and have the authority to design the best path to achieve it. There should be one person on the CRC tasked with communication back to the CLT, so that their progress is transparent and so that the CLT can ensure that the CRCs' proposed solutions complement one another and combine to achieve the overarching goal.

Once you have established your goals and objectives, the CRCs help complete your Crisis Response Plan by adding specifics for each objective or activity. The plan should include the goal and measurable objectives. Each objective might also include the activities needed to achieve that objective, the resources needed, the timeframe to accomplish it and any outputs or metrics that will help you to understand the impact of the work.

An example of an objective and associated activities follows:

Objective: Inform all affected individuals of appropriate relief websites within the next 72 hours.

Activity 1: By Hour 3, identify a host for the website.

Activity 2: By Hour 3, identify, document and distribute all relief contact numbers to the CMT.

Activity 3: By Hour 6, develop all content for the website and submit for review.

Activity 4: By Hour 10, publish all content on the crisis relief website.

Activity 5: By Hour 10, determine plan and resource to monitor the website.

Activity 6: By Hour 16, test website to insure it is accessible by all who have been affected.

Activity 7: By Hour 20, launch the website.

CRISIS RESPONSE PLAN ELEMENTS

Goal The desired result that your team hopes to achieve in a certain amount of time. Your plan may or may not have more than one goal.

Objective Measurable criteria that tells you how to achieve your goal by specifying what you must do, in what time-frame. Each goal will have one or more objectives.

Activity Specific tasks needed to be complete in order to achieve your objectives. Each objective will likely have more than one activity.

CRISIS RESPONSE PLAN TEMPLATE

GOAL			
OBJECTIVE			
	LEAD	DUE DATE	PRODUCT/OUTPUT/METRICS
ACTIVITY			
ACTIVITY			
ACTIVITY			
OBJECTIVE	LEAD	DUE DATE	PRODUCT/OUTPUT/METRICS
ACTIVITY			
ACTIVITY			
ACTIVITY			

GOAL			
OBJECTIVE			
	LEAD	DUE DATE	PRODUCT/OUTPUT/METRICS
ACTIVITY			
ACTIVITY			
ACTIVITY			
OBJECTIVE	LEAD	DUE DATE	PRODUCT/OUTPUT/METRICS
ACTIVITY			
ACTIVITY			
ACTIVITY			



Establish Support Resources

Experts and external resources may be required to help solve some problems that you have identified to be immediately addressed (e.g. financial issues of members, student homelessness). Your CRCs will need to act quickly to identify and secure these resources.

Think about what the needs are within the objective you're trying to meet, when the need must be fulfilled, and who or what would best address the need.

Make sure you are considering the needs of the entire population, with special attention to those who are vulnerable or most adversely impacted by the crisis at hand CRCs can use the tool provided here to keep track of their resource needs and share their emerging needs with the other crisis resolution stakeholders. If a CRC does not know where to turn to have its identified needs met, the CLT should help secure the resources needed. A tool like this can also be used to crowd-source resources among the association's networks. In a crisis, many stakeholders are usually willing to step in and help, if only the specific needs are made known.

OBJECTIVE: _____

NEED	TIMEFRAME	POTENTIAL SOURCE(S)	CONTACT

OBJECTIVE: _____

NEED	TIMEFRAME	POTENTIAL SOURCE(S)	CONTACT

OBJECTIVE: _____

NEED	TIMEFRAME	POTENTIAL SOURCE(S)	CONTACT



Create a Communication Plan

As you work through your crisis you will impact many people, so it's important to develop a quick plan that details communication channels and frequencies. Effective information sharing is key to remediating crisis situations. The CLT will need to communicate effectively with its members, with CRC teams, with public service stakeholders, with parents and students, with the community at large, and possibly with federal and local governments about its progress.

Your Crisis Response Plan should contain communication details to help you determine when, and how to communicate with other responders and stakeholders. It should list a schedule and communication method for communicating with all team members, affected populations and stakeholders. The goal of the communications plan is to set expectations for when and how information will be distributed.

Thorough communication details include the following components:

- **Content:** The information which will be included
- **Audience:** To whom the information is directed
- **Communication Method:** newsletter, analytical report, "breaking news" update, etc.
- **Sources:** From where the information will come
- **Frequency:** The timeframe and frequency of information distribution
- **Point of contact:** The person responsible for the communication

Remember that the natural network provided by the local association is a massive and effective communication vehicle to spread knowledge amongst stakeholders about processes, experiences and outcomes. The denser the communication network, the more effectively knowledge spreads.

In addition to these external communications, consider internal communications to your members. If you don't already have a regularly scheduled communication, now is an opportune time to start. By communicating clearly, transparently and on a regular schedule, you not only establish a vehicle for information flow, you establish trust. Members gain an understanding of your goals and actions, and it provides a vehicle to reinforce that you're responding to their needs with everything you do. When the time comes to mobilize, your members are informed and will be better prepared to address the crisis at hand. Your internal communication plan should have all of the same components as your external communication plan.

COMMUNICATION PLAN TEMPLATE

EXTERNAL (HOW WILL WE ALL SHARE WITH THE COMMUNITY?)

CONTENT	AUDIENCE	METHOD	SOURCES	FREQUENCY	POINT OF CONTACT

INTERNAL (HOW WILL WE SHARE WITH OUR MEMBERS?)

CONTENT	AUDIENCE	METHOD	SOURCES	FREQUENCY	POINT OF CONTACT



8

Understand Decision-Making

No matter the circumstances, it is important for teams to understand how decisions are made, and to set expectations around that process.

Not all decisions are made the same way. Sometimes a decision's risks, impact, and importance affect how collaboratively it can be made. Quite frankly, not all decisions are appropriate to be shared in a time of crisis where responsiveness is of the utmost importance. Sometimes the skills, influence, and experience of decision makers factor into the decision-making equation.

Dr. W. Patrick Dolan from the Consortium for Educational Change studied how decisions are made and developed a scale to measure the degree of collaboration involved in the process. The scale depicts the extent to which a

decision made between two people or two stakeholder groups are shared. Of the seven decision-making steps on the scale, steps one and seven represent authoritarian decisions that are made solely by one party. Not all decisions are appropriate to be shared; some decisions will always remain in the purview of one party or the other, such as the decision to escalate a particular issue or the response decisions a CLT makes as required by local policies.

When time and circumstance allow, making the choice to move a decision from step one to step three is worthwhile because even if the decision is solely an individual's to make, they will make a more informed one if they have input from others on the team. As you move towards the center of the scale, each step moves a degree closer towards collaboration represented by step four. The more decisions that can be made at step four, the stronger the collaborative relationship becomes amongst teams. **Therefore, where at all possible – and time allows – include the team in discussions and decision-making.**



You can view Dr. Dolan describing his continuum here: turnweb.org/videos/patrick-dolanlearning-to-live-together-building-a-culture-of-collaboration-focused-on-improving-teaching-and-learning/.



Monitor Progress and Impact

There is a lot to manage as you implement your Crisis Response Plan and it will feel daunting. In the midst of everything that is going on, the CLT needs to set a schedule and designate a process to periodically review the plan.

For each review check-in, use the template below as a model to record the date of the check-in, objective being discussed, point of contact and relevant comments.

You should consider including a key performance indicator (KPI). This is a simple icon you can use for each entry to indicate whether its status is moving as expected, cautionary, or in trouble. Often, green indicates that things are progressing as expected, yellow indicates caution and red indicates trouble. A red performance indicator is an alert that something is not going as planned and needs immediate attention.

You may want to designate a CLT member to manage the monitoring duties. At this stage, monitoring is not about assessing results, outcomes, or objectives, but a way to keep track of whether the objectives in your Crisis Response Plan are being implemented as planned. Monitoring may shed light on any unforeseen challenges that have prevented successful results so that you can mitigate challenges promptly and continue your relief efforts with minimal interruption.

Check-in Date	Objective/Task	Point of Contact	Comments	KPI



Reflect

As you reflect upon all that recently transpired, think about the potential of collaboration in your system and about the important collaborative structures you have established as you look towards a brighter future.

The crisis is over! Your emergency response work is complete, and you have had the time to step back from the physical and emotional demands of the situation.

Take some time to go back and look at your goals and objectives.

- How many of them were you able to meet?
- How many of them required changes along the way?
- Were you able to monitor your progress effectively and make changes to your plans as the situation needed?
- Were you able to communicate with everyone involved?
- Did the CLT and CRCs work effectively under such difficult circumstances?

The fact that you documented your goals, objectives, progress monitoring and communication plans provides you with a tool which allows you to reflect on your actions. During a crisis, we are thinking and reacting on our feet to the latest news and updates and we seldom have time to think twice about what we are doing. Now that the crisis is over, look at your documents and understand what went well for you and your CLT and where you might consider making improvements to your plans. Do the same analysis for the work of the CRCs. No one wishes for a second crisis, but having survived one, it would be prudent to learn from your efforts.

The planning you did to address this crisis can also serve as the foundation for future collaborative efforts. This guide took you through a rapid planning process to deal with the crisis at hand, but the steps that you took followed a repeatable methodology. NEA has created a collaboration framework to walk teams through establishing a collaborative partnership, building productive working relationships, fostering school-level collaboration, identifying shared student-centered goals and establishing structures to sustain and grow collaboration. In addition, NEA has created a companion guidebook, **[Collaborating for Student Success](#)**, which follows the phases of the framework and provides more detail on collaborative actions including background information and research, examples, links to additional resources and tools to implement each stage of the framework.

Perhaps one of the most important outcomes of your crisis response work was the partnerships that were formed to facilitate the collaborative process. These teams and committees are still essential beyond crisis management and form the foundation for effective, on-going collaboration.