

# THE 5RS

## DIAGNOSTIC DOCUMENT

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# RECOGNISE

## RECOVERY TEAM

Please note this team is not the team presently delivering the daily programme. This is a new team focussed on delivering the first steps in returning to 'normal' there maybe cross over, but the aims of the team are very different. This team must shoulder responsibility, be accountable, be consulted and consultative as well as being informed and informing about the reopening.

It is recommended that the School assigns these positions within the School community, and that this team meets at least weekly prior to the School reopening.

Whole School Recovery Lead	-	_____
Student Welfare Lead	-	_____
Academic Recovery Lead	-	_____
IT Recovery Lead	-	_____
HR Recovery Lead	-	_____
Communications Recovery Lead	-	_____
Finance & Facilities Recovery Lead	-	_____

## INITIAL ACTIONS

It is important at this stage in the recovery process to recognise that reopening is time critical but also high risk; first impressions matter more than ever. Parents will be taking into account the communication received prior to the school reopening into account – if these aren't strong it enough it may be that they don't return.

WHOLE SCHOOL	
Agree an opening date	
Inform staff of any agreed changes to the regular school timetable via email in the first instance.	
WELFARE	
Take actions to secure the immediate safety of pupils and staff – this may include listing all members of the School community who [came into contact with someone who] tested positive for COVID 19.	
Establish all visitors, contractor and peripatetic staff who may be affected.	
ACADEMIC RECOVERY	
Compile a list of all academic staff available	
Obtain an up-to-date pupil roll	
Assess whether current timetable is fit for purpose, and rewrite if not	
IT RECOVERY	
Compile list of resources required to transition back to in school learning	
Audit what worked and didn't work during the homeschool period -programmes that were cost-effective and less so.	
HR RECOVERY	
Establish how many staff will return to work	
Compile a comprehensive financial account of remuneration required: redundancies, bereavement leave, maternity leave etc.	
Agree staff return dates	
Begin process for replacing staff lost during the crisis	
COMMUNICATIONS	
Prepare a statement regarding the reopening of the School, and agree channels for this to be released	
It is suggested in the first instance that a brief email is sent to all parents on behalf of the Head explaining the suggested reopening, including timescale.	

All staff should be informed as soon as possible, being given the same, accurate information, as should the school governors. It is suggested that the statement sent to parents is also emailed to staff and the Governing Body, letting them know it has been sent to the parents.	
Where possible the School will not respond to Media enquiries and will direct all such enquiries to PHE (if directed) or the local county council Press Office. The School will work with the Press Office as soon as possible to agree the facts released to the public.	
If it is deemed it necessary for a nominated Spokesperson to make a statement the Media & Communications Officer will ensure that the spokesperson is well-briefed and will inform the relevant media bodies of the intention to make a statement.	
Advice to staff regarding the handling of media enquiries.	
School Receptionist/Executive Secretary to be briefed on what calls to go where	
FINANCE & FACILITIES	
Allocate a budget to recruit and retain pupils	
Ensure all transport links required for pupils are up and running – if not, come up with alternatives	
Arrange an appropriate place to receive parents/guardians	
Informal external lettings of the development	
Arrange for a deep clean	

# RECALIBRATE

## REFLECT

1. How well and how quickly did you recognise and react to the onset of the crisis?

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2. How would you change your communication to: a) Staff b) Customers c) Governors d) Suppliers

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3. Was their response as you would have wished? If not where was it surprising? Good and bad.

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4. Did you feel that you were carrying the creative burden yourself or did you receive good input from others?

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5. Have some staff stepped up and been recognised?

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6. How do parents and staff's attitudes vary towards the business?

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7. Has your management become more fluid, more flexible and more agile?

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8. Did your school appraisal programme help you to identify those who wished to contribute more?

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9. Does your school Development Plan still work?

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10. How has the School's reputation been affected?

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11. What has been the impact on the brand not from COVID 19 but from the school's actions on and after the point of crisis?

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## LEADERSHIP

1. School leaders need to listen now more than ever. Did you Tell, Sell or Consult when arriving at changes to policies and procedures?

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2. The communication needs to be Clear, Authentic and Truthful. Are you happy that your communication followed these CAT Leadership principles?

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3. Have you been able to identify issues that could have been avoided by better leadership? What would you do differently next time?

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4. Leadership is not all about being the first out of the trench and over the top, but you do need leaders to show that they are prepared to be first with the sacrifice of benefits and convenience. If they don't, you can be sure that other staff will spot it and respond accordingly. What have you learned about individuals within your management team? How will you address it now?

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5. Have you identified any personal leadership skills that you could improve?

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6. Have you identified weaknesses in the leadership /management structure that need addressing as you move forward.

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## FINANCES

1. Review operating spend. Is every cost needed in the new 'model'? Assume that all costs are new ones and be convinced that they are essential.

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2. Staffing costs will be your greatest overhead. Start with part-time staff and see if duties can be reallocated. A freeze on pay increases will probably be inevitable so identify those staff members that you want to retain and invest in their personal development and training. Motivation can be found in more actors than just salary.

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3. Review your purchasing policies. Use a 'four eyes' authorisation process to put every expense under scrutiny. Remove any automatic budgets and replace with 'proven need only' spend.

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4. Did providers 'provide' during the crisis? Reset your contractual relationships using 'force majeure' conditions.

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5. 'Must have' or 'nice to have'?

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6. Revisit all capital expenditure plans to retain only those essential to stay competitive.

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7. Review cash flow policies to minimise borrowings and interest costs.

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8. Can you develop cross training programmes so staff costs can be reduced as staff can be trained to fill other jobs?

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## EDUCATION

	Yes	No
Textbooks/exercise books v Technology is there a new balance		
Is the content of the curriculum still relevant		
Are the timings of the day still relevant		
Do you have Heads of skills not departments		
Future of IT moving forward		
Are the classrooms of the right design for new ways of teaching		
Storage, if less books?		
Homework changes		
With the changes to external examinations will the same routines and assessments continue or has this forced a rethink		
How/what do you report to parents now?		
Do senior leaders have relevant job descriptions?		
Can parents' meetings now be virtual for some families?		

## FUTURE PROOFING

1. Who are you as a school? What has made you successful in the past. Is it still relevant and does it still provide a competitive edge. Ask 'if we were to close tomorrow what would be left that other schools could not do?'

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2. What do you stand for? Does the brand message align with school's core values and behaviours. Have these slipped in recent years? Are they still relevant?

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3. Pupils, Parents, Professionals – the 3 Ps. Does every part of the school live and breathe the school ethos?

	Yes	No
• Every lesson,		
• Every interaction,		
• Every communication		
• Every colleague		

4. Does your performance management programme suit the new business model?

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5. What skills do you need moving forward as a team?

- as educationalists

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- as a business
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## MARKETING

1. What is the aim of your marketing?

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2. What is your message? Is it consistent and persistent?

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3. What are the KPIs for your marketing budget?

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4. Are you able to measure:

	Yes	No
Media/event cost effectiveness		
Visits per enquiry		
New pupils per visit		

5. Ask marketing team for their thoughts, if they are simply doing as they are told and don't offer anything, are they the right people? This department needs to be now, more than ever led by high performing professionals

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6. Do the staff need training to support the marketing?

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7. What new ways have they found to get customers, virtual open days, will they work now?

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8. Are there any other ways?

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9. Do you now need to revise the strategy?

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10. Have you reviewed the:

	Yes	No
Marketing Material		
Communication Platform and Processes		
Competition		

11. Are the 3P's all on the same page, if not how to get them there

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12. Does the brand message align with school's core values?

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13. Does the marketing team need leading or is it proficient to deliver a new way forward?

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14. Is it more cost effective to train internally to do your marketing or outsource?

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## COMMUNICATION

1. Staff. There will be constant change to plan for and to communicate. Can you be sure that your past approach to this is the correct one and allows for sufficient communication? You need to be sure that your management team have the skills to deliver messages in the correct content and tone. Appropriate social distancing and group sizes will also impact on your approach. Good communication is essential not least because you will need to build on the 'war time spirit' and gain consensus for difficult decisions at all levels.

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3. Different messages in style and content for different staff groups.

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4. Parents. How can you discover current attitudes and intentions? Surveys and focus groups can work if carefully constructed. You will already be wary of sampling from social media groups and the omnipresent vocal minority.

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5. Have you reviewed all finance and administration communications for style and content?

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6. Simplify and reduce the amount of written communication. What lessons are there from the often superb online teaching and provision that schools have been providing?

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## TRUST

1. Where do you need to be rebuild trust?

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2. Which suppliers can you trust to deliver quality to agreed timescales?

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3. Do you have a consistent approach to parents who may have broken agreements with you?

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4. How can you create a culture where every colleague understands the need to fulfil promises, meet deadlines and to be on time – every time.

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## COMMUNITY

1. Where do you sit in the community. Are you seen as part of that community?

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2. Independent schools are seen to be rich in resources and facilities. Have you been able to share these? Minibuses, car parking, open spaces, outdoor facilities, disadvantaged children? Can you ramp this up during the return to 'normal'?

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3. Can you localise the supply chain so you can be seen to support local business?

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4. Sponsorship as part your marketing plan?

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# REPAIR

## LEADERSHIP IN COMMUNICATION

1. How can you show that your strong leadership that is clear, authentic and truthful

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2. Can you show evidence of a plan for repairing f reputational damage which shows resolve and effective action based on the plan in place?

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3. As well as whole school leadership the leaders in communication /marketing are vital in repairing reputation. Who is your colleague responsible communication?

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4. Is the job description for the above role still relevant in the post COVID-19 world?

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5. Is your lead communicator able to bring the 'outside world ' in so the decisions made can be looked at from the 'outside' in order that any decisions made are done so from a wide-ranging perspective.

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6. Is your lead communicator able to take the 'inside world' out and show the world what is going on?

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7. Does your lead communicator pin everything to the objectives, character and competences of the school?

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8. Does your communicator ensure they own the narrative and can rebut gossip or misinformed opinion might have in reputation?

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9. Is the lead communicator trusted by the parents/staff/local media

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10. Does the communication demonstrate and reflect social conscience?

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11. Does the communication lead recognise and reflect the school's role in and the affect the school has on the community during a time of repair?

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12. Are you conscious of the moral trap of appearing overly conscientious and thereby sparking cynicism?

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### WHAT IS THE PLAN?

1. Have you identified a system to show what is with responding to and what ,if you do respond might cause further damage? Sometimes silence is best.

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2. Do you have plan in place to rebut negative press?



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3. Do you have a place for parents to give feedback

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4. Who will lead this plan and who will be involved?

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5. Is the plan reflective of your core values

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6. Does the plan provide open communication across, leaders, staff and parents

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7. Have you identified the reputational risks? If so – what are they?

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8. What is your plan to take parents and staff views on board?

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9. Does your plan include a bank of positive comment that could be released during the programme of repair in order in reinforce the core values of the school?

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## APOLOGISING

1. Start by quickly issuing a formal apology letter on your website and reference it on all social media platforms. Do you have a bank of templates ready to go, written without the emotion of the crisis?

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2. Do you have plans to post this on social media?

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3. In the post COVID-19 world of online meetings can you post a video of apology- host a meeting online for parents?

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4. Is your apology straightforward apology that's genuine, brief and factual about what happened, and focus on the future. Ditch the jargon, own up to the mistakes.

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5. Does the apology include a course of action?

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6. How will you monitor the effectiveness of your apology?

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7. Check the comments section of websites/social media/review sites.

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8. Collate all feedback and comments in one document so you can detect patterns

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9. Do plan a timetable of review with the complainant/s to ensure they know you will follow up

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10. Finally review the process and see what can be undertaken better in future

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## CONTROL THE MESSAGES

1. Have you a reputation review in your school development plan?

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2. Do you hold reputation review meetings?

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3. Are your communication leads able to discover your reputation?

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4. Can you outsource and save money?

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5. Do you have plans to get ahead of conversations that might be tricky?

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6. Have you 'Googled' your school, you or staff recently?

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7. Are all your behaviours, decisions and actions reflective of the school's ethos and brand?

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8. Are all your whole school behaviours, decisions, and actions reflective of the school's ethos and brand?

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9. Are all your staffs' behaviours, decisions, and actions reflective of the school's ethos and brand?

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10. Are all your suppliers' behaviours, decisions, and actions reflective of the school's ethos and brand. In their contract are they told they must always uphold the good name of the school?

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11. Do staff and parents always have statements in their contracts re promoting the school?

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12. Does your school development plan include training all staff in delivering this message?

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13. Do you check or promote the 'Share of voice' data?

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14. Do you have a system in place to track local media internal role or contracted to experts?

## UNDERSTANDING THE COMPLAINTS

1. Do you have a system for both internal and external complaints?

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2. Do you know what the complaints are about?

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3. Do you encourage honest feedback?

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4. Do you keep spread sheets of comments?

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5. Do you have a set of response templates?

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6. Do you have a recovery road map for dealing with complaints, is there a staged response document?

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7. Do you have a system in place to see if the specific complaint is felt wider by parents/staff?

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8. Do you ask the complainant what a successful solution would look like?

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9. Do you have a single point of contact for complaints?

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10. Do you keep an eye out for potential parents/ staff who might look like a complaint?

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11. Do you provide (if possible) a menu of different solutions?

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12. Do you ensure the complainant knows the process and timescale?

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# REDIRECT

## LEADERSHIP AND MANAGEMENT

1. Do leaders know what matters most to your parents and what will matter to them moving forward?

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2. Is every member of the team, and Governors communicating intentions clearly and transparently?

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3. How will you measure if you are delivering on the new redirection?

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4. Are the leadership addressing and communicating the financial angles clearly to staff to build understanding?

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5. Is the leadership team trusted by staff in this period of redirection?

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6. Does the leadership team take accountability for and raise the tolerance for errors as you redirect the new school?

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7. Do you have Redirect training to ensure you generate an alive and agile staff with cross training programmes?

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8. Is your leadership team living the 'new' school in all they do and say?

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9. Is the team moving from crisis management to redirection management, reactive to proactive?

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10. Does your team have educational management change experience on a whole school scale or is it more cost effective to outsource support?

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11. Have you all agreed on a common redirection language that must become the whole school mantra?

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12. Have those who have been involved in furloughing staff been coached through and post the events to ensure they have the physical and mental resources required?

## FINANCES

1. To start financial redirection have you, can you identify the growth drivers in the marketplace and invest in them. Do you need to outsource for this information?



2. Are you starting cost containment where you freeze but don't cut?

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3. Are you cutting teachers and damaging the core business rather than looking for savings or extra income streams elsewhere?

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4. Will you have to redirect finances to Health and Safety matters?

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5. Have you planned to redirect resources into innovation rather than restoration of present systems/approaches?

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6. Revisit all capital expenditure plans to retain only those essential to stay competitive

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7. Can you offer two schools? An online learning environment and a physical school thereby creating jobs?

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8. Can you develop cross training programmes so staff costs can be reduced as staff can be trained to fill other jobs?

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9. Have you redirected financial resources required to begin operations in the 'new' school business model

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10. Adapt management information to reflect current circumstances

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11. Ensure any financial management actions and process changes are essential for the future of the business

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12. Ensure clear, concise, consistent communication of actions and changes

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13. Update cash flow and liquidity forecasts and consider increasing frequency of their production. Keep focussed on key KPIs and reduce unnecessary detail.

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14. Have you redirected your general financial risk management?

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15. Can you redirect your customer contracts/fee structure to provide fixed fees for a longer period than the traditional one term commitment? This would provide certainty to assist planning and to support any emergency borrowing that might have been necessary.

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## EDUCATION

1. Do you have the message of redirection in all areas of the academic arena?

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2. What messages are you sending out about the academics in the school, is this reinforced/undermined by any redundancies?

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3. Have you reviewed the online learning experience and been able to redirect new resources or explain its effectiveness to stake holders?

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4. Are you redirecting education communication back to the old approaches and really selling the benefits of face to face learning?

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5. Are your marketing team giving the same “presence” to ‘in school learning’ as they did to promoting the online experience?

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6. How are teachers being trained to/able to support this message?

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## BUSINESS

1. What capabilities do you have that are different from your competitors?

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2. What is the new direction for the business?

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3. In Feb 2019 60,000 children were home schooled. Can you use your recent online provision to capture some of that market alongside your 'in school provision'?

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4. Do you have a redirected technology plan to use across the business?

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5. Do you have multiple scenario models to help redirect as needed?

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6. Have you a plan to implement the new redirected operational strategy?

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7. Can you redirect any of the business to outsourced work?

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8. Have the leadership and management teams been identified for the new direction?

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9. Do you have data to know if the business is trusted by the stakeholders and employees?

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10. Have you redirected the business on a new interim path and is the whole business living and breathing the new direction? How do you know?

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## MARKETING

1. How has the market environment changed?

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2. What is the message for customers that matter most- parents?

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3. How has your message changed from repair?

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4. What does the new message look like?

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5. What vehicle are you using, is it cost effective?

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6. Where is your focus, owned, earned, or paid marketing directed? Can finding out the effectiveness of this be outsourced and save money?

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7. How are you recording the data to see if you are 'reading the waves' your strategy is making?

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8. How often are you meeting to assess data, if any, that you have?

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9. Is your marketing team able to deliver this new redirected approach or is it money well spent to outsource some aspects - data reviews etc?

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10. Has the crisis made your previous planned messaging seem off-kilter in any way, even now that the initial waves of crisis emotion have subsided among your key audiences?

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11. Has the new world order changed the effectiveness of any of your marketing tactics?

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12. Do you need to increase your frequency to ensure you don't lose market share or even more revenue to the crisis?

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13. Have you redirected financial resources to this new message?

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## COMMUNICATION

1. Does your language and imagery reflect the 'new' message?

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2. Do staff have clear communication and feedback channels at all times?

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3. How are you assessing all channels – are you stopping what is not effective?

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4. Do parents have a clear feedback channel?

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5. Have you proactively looked to open up communication opportunities?

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6. Have you conducted a crisis post-mortem debrief and analysis. Include detailed analysis of the organization's social media engagement and sentiment?

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7. Are you implementing a strategic communication strategy to reach audiences to proactively answer questions and concerns and earn respect for doing the right thing?

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8. How are you following through on any promises made to the public, employees, other stakeholders and pros?

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9. How are you building confidence in leadership and governance?

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10. Have you identified all key audiences who should know about progress being made/damaged relationships which need repairing?

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