

# Executive Summary:

## Pennsylvania Department of Education After-Action Review

The National Comprehensive Center (NCC) first became engaged with the Pennsylvania Department of Education (PDE) through its [Education Stories from the Field](#) project. The project explores how State Education Agency (SEA) education chiefs and district leaders in Missouri, New Mexico, Pennsylvania, and Wyoming responded to the COVID-19 pandemic. It contains an interactive timeline from March 2020, when schools suddenly closed, through April 2021, when vaccines were available and schools were finishing their first full school year in the pandemic. As a follow-up to the project, the NCC designed an After-Action Review (AAR) process to help the four SEAs reflect upon their actions and use what they learned during that time to plan future work and lift up common lessons, bright spots, and ongoing challenges.

In the fall of 2021, PDE leaders, NCC staff, and the Director of Regional Center 4 co-designed the AAR process for a meeting with the PDE senior staff team on January 19, 2022. PDE chose to focus on two pandemic-related topics: the agency office/telework plan, *Reinventing How We Work*; and the impact of their return to school plan, *Creating Equitable School Systems Roadmap for Educators*.

Each participant in the AAR addressed the project that they had been involved with. Key implementation support positions such as the Evaluation Manager, Communications Director, and Policy Director also participated. Conducting an AAR ideally entails a minimum half-day of reflection on each topic, but time constraints necessitated addressing both topics in less than a full day. The team structured the process using whole group discussion and report-out activities, and three smaller discussion workgroups to maximize the limited time available. The discussion workgroups were Office/Telework, Equity Roadmap, and a “special” group that focused on reviewing documents and data to map outcomes and impacts on the goals and target audience of the project activities.

The agenda was divided into three reflective segments and one forward-planning segment to help the participants examine their topics by the following:

- » Defining the “why” (reflective; external conditions, and assets);
- » Unpacking the “how” (reflective; assumptions and strategies);
- » Reflecting upon the “so what” (reflective; outcomes and impacts); and



» Building the case for “now what” (forward-planning; remaining questions, creating pitches).

The “special” group focused on the following:

- » What do we know?
- » What have we communicated?
- » What do we still need to know?

Through the above process, each group created a set of headlines designed to help the PDE staff understand and clearly articulate what had transpired around the two work streams. The headlines provided a base on which to build a narrative that supports continuation of practices that worked well for SEA staff, district staff, and students.

Preliminary feedback from the PDE staff participants was that the AAR provided participants with the following:

- » A useful process to unpack their work,
- » The opportunity to engage in meaningful cross-department collaboration,
- » A collective understanding of their work, and
- » End-products to use as advocacy tools for future effective policies and practices.

Below are summaries detailing the reflective and forward-looking discussion points, headlines teams created during the discussions, and documents provided prior to the meeting as well as participant input during the meeting. The work from the special group is embedded within each topic as outcomes, impacts, and future information/data needs.

## PA DOE Telework Plan: *Reinventing How We Work*

**Purpose:** Document and understand why and how the PDE Telework plan, *Reinventing How We Work*, was created and reflect on how successfully PDE was able to work using their telework plan to assess future applications of the plan.

To understand why PDE created a permanent telework policy, the group first reviewed the **external conditions** that led to the need for a temporary and subsequently permanent telework plan. Chronologically those conditions included the following:

- » Prior to the pandemic, PDE leadership was historically against telework, whereas some other agencies had telework policies already in place.
- » In February 2020, news about COVID-19 sparked pre-planning efforts at the Governor and agency levels in PA.
- » March 2020: Schools and offices closed due to the pandemic. PDE knew that schools still needed support, and regulatory work needed to continue.



- » On March 16, 2020: The Governor ordered all agencies/buildings closed. Employees were given Paid Office Closing, those employees who could work from home were able to do so. PDE created an emergency telework policy/procedures at this time.
- » March 2020: PDE used results from their *Access to Technology* survey to make decisions about their emergency telework program, including the distribution of refurbished laptops, early use of personal devices, guidance for PDE staff on telework management, use of virtual teams, and other IT issues.
- » April 11, 2020: 98 percent of PDE staff were equipped and teleworking.
- » June 2020: Commonwealth Office of Administration (OA) published the Emergency Temporary Telework Agreement template for all agencies.
- » PDE made a commitment to provide 4 weeks' notice to staff prior to their return to the building.
- » August 2020: All teleworking PDE employees completed the Emergency Temporary Telework Agreement.
- » October 2020: Secretary Ortega was nominated Secretary of Education and the agency experienced significant turnover in the Senior Leadership Team.
- » January 2, 2021: OA announced a proposed date of return but later rescinded it.
- » April 2021: PDE created the first draft of their Permanent Telework Plan, as other agencies were being encouraged to develop agency-specific permanent telework plans.
- » May 2021: With the pandemic continuing past the predicted few weeks or months, the Governor ordered agencies to extend their emergency temporary telework plans to June 30, 2021.
- » June 2021: OA announced that agencies were to begin returning to their buildings according to a prescribed schedule. PDE's return date was July 25.
- » August 8, 2021: While agencies began to return employees to their buildings, PDE implemented the Building Return 4-week Pilot (August 8).
- » September 2021: Based upon Pilot results, PDE created their Permanent Part-Time Telework Plan.

The second step to understanding *why* the Telework plan was created entailed identifying the assets that existed prior and during the plan creation. **Assets** identified through the pre-work and in the meeting included the following:

- » Existing Continuity of Operations Plan and PDE Staff Survey Results
- » Support for creation of the permanent telework plan by PDE executive team members participating in the Coherence Lab Fellowship and OA
- » Ongoing support and communication provided by PDE leadership and OA with the Agency Telework Coordinator group
- » The use of an empathetic and caring approach for staff members and individuals
- » The use of collaborative and transparent decision-making and planning processes
- » Ability to leverage positive existing relationships within the field



After examining *why* PDE created a permanent teleworking plan, the team worked to memorialize *how* it was done. The first step was to outline the assumptions that PDE staff applied to create their plan. **Assumptions** identified by the team included the following:

- » PDE's work needed to continue regardless of how long stay-at-home orders lasted.
- » LEA needs were great and PDE needed to support them during stay-at-home orders.
- » PDE staff members were professional and would approach telework accordingly.
- » Our performance in emergency temporary telework could be leveraged as a positive motivation for adopting a Permanent Telework Plan.

After reviewing their operating assumptions, the group highlighted the strategies used to create and implement what finally became the permanent telework plan. Those **strategies** included the following:

- » Implementing a technology needs survey to ensure staff were equipped for telework;
- » Using innovative solutions such as providing refurbished laptops to employees who lacked devices;
- » Establishing a Building Return and Telework Work group;
- » Providing weekly communication for all employees and additional weekly communication for senior staff;
- » Offering multiple feedback mechanisms such as surveys, idea catchers, etc.;
- » Implementing techniques provided by the Coherence Lab
  - › Conducting empathy interviews
  - › Breaking down work into manageable pieces
  - › Creating prototypes
  - › Using ongoing development feedback loops
- » Holding a PDE staff Town Hall meeting;
- » Creating training presentations, video vignettes; and
- » Implementing Return to the Building Pilots.

After the group reflected upon external conditions, assets, and strategies, the specials group joined the Telework workgroup to examine existing data to understand outcomes and impacts of the telework plan to focus on the *So What?* **Outcomes** from implementation of the temporary and permanent telework plan pilots included the following:

- » Technology access gaps were identified and addressed.
- » PDE staff proved they could maintain deadlines and milestones while working remote.
- » Communication between staff members increased due to telework practices.
- » PDE staff supported each other.



- » Employees assert they were saving money on gas.
- » Over 80 percent of PDE staff cited telework as being “good” or “great.”

**Impacts** from the telework plan and pilots included the following:

- » PDE staff can now apply “21st Century” recruitment and hiring strategies due to the absence of strict geographic limitations.
- » PDE is now able to use more innovative work strategies.

While the Telework workgroup found the outcome and impact data to be informative, group members pointed to **several remaining questions** they would like to answer to better understand the outcomes of the telework plan. Those questions included the following:

- » How often did staff encounter tech issues?
- » Why do some staff want to continue work in person?
- » Were there disruptions to services?
- » Are staff able to maintain a work/life balance?
- » Has the current telework policy helped retain staff members?
- » Has the policy impacted the ability to diversify the PDE workforce?
- » Is there a “binding” agreement with unions for teleworking?

In addition to the above reflective questions, the group also identified some *Now What?* **forward-looking questions** that would inform future implications around the continuation of the telework plan. Those questions include the following:

- » Will there be cost savings as a result to the PDE work plan?
- » What will happen under the next administration?
- » What will recruitment and retention look like?
- » How does the move to a new building impact the plan?
- » How can PDE engage staff and keep them involved?

The culminating activity for the telework and special group was to create a pitch to advocate for continuation of the telework plan. The assumptions behind the pitch are important to note, as they likely will be included in a comprehensive document on why the agency’s innovative approach to work is a policy that should remain in place. Those assumptions all begin with the statement, “We are prepared to show”

- » Our team is more diverse along race, ethnicity, geography, professional expertise, and work experience because of the recruiting benefits associated with telework.
- » On top of all other responsibilities, 100 percent of the acquisition and implementation of \$8 billion in federal stimulus funding was accomplished within a telework environment.



- » PDE has developed new processes and artifacts that have increased productivity and are preparing PDE for future work.
- » Continuous improvement of all processes to accommodate changes and needs in the field is ongoing.
- » Our engagement with partners in the field has become wider and more inclusive of groups who might previously had little to no access to PDE.
- » We can continue to be agile and responsive to the field using telework as a viable work environment to meet the needs of our workforce and external partners.

In sum, PDE staff believe that they “turned disruption into an opportunity to innovate their approach to supporting their workforce and the field in more agile and new ways.” See Appendix A for their complete pitch, which includes many of their headlines and data supporting the positive outcomes from their “Reimagining the Way We Work” policy and practice.

## Creating Equitable School Systems Roadmap for Educators

**Break-Out Purpose:** Reflect on the creation and impact of PDE’s “Creating Equitable School Systems Roadmap for Educators,” and implications for the future.

To understand *why* PDE created the Roadmap, the group first reviewed the **external conditions** that led to the need for it. Those conditions included the following:

- » Schools closed in March 2020 due to the pandemic.
- » Schools needed to safely and effectively provide continuous learning under changing and atypical conditions.
- » Schools in PA are decentralized, but still desired and needed guidance from the agency.
- » The agency had experienced large turnover in senior staff members.

After identifying the external conditions, the Roadmap team identified the **assets** that helped the agency successfully create and implement the Roadmap. The assets included the following:

- » Support from the Coherence Lab to establish and use more efficient and effective work routines.
- » Direct contact between PDE staff and schools through Intermediary Units.
- » Support from Regional Comprehensive Center 4.

After examining *why* PDE created the Roadmap, the team then reflected on *how* it was done. The first step was to outline the assumptions that PDE staff applied to create their plan. **Assumptions** the team identified about the Roadmap was that

- » It was important to support the health and safety of educators, students, and the community while providing a high level of education for students.
- » Students needed equitable education access through the implementation of three different learning models that could be implemented based on local community health conditions.



After reviewing their operating assumptions, the group highlighted the strategies used to create and implement the Roadmap. Those **strategies** included the following:

- » Identifying research-based resources and partner organizations to help schools continue their education programs.
- » Implementing twice daily executive team meetings.
- » Receiving ongoing support and guidance from the Coherence Lab.
- » Hiring Mass Insight and Mathematica to provide empirical data on effective mitigation efforts to provide accurate guidance to schools.
- » Developing the guidance document, “Creating Equitable School Systems: A Roadmap for Education Leaders.”
- » Posting the Roadmap guidance document on the PDE website and disseminating it through a series of webinars.

After the group reflected upon external conditions, assets, and strategies, the specials team worked with the Roadmap group to examine existing outcome data to understand outcomes and impacts of the Roadmap to focus on the *So What?* It is important to note that Roadmap outcome data is limited to descriptive survey data by Mathematica during the 2020-2021 school year as assessment data was not available at that time. Data from Mathematica’s initial survey report highlights the learning models being implemented by schools and how various student groups were served. **Outcomes** data identified by the specials group from the Mathematica brief, “[School Instruction in Pennsylvania during the COVID-19 Pandemic](#)” included the following:

- » Schools received evidence-based resources from PDE to assist with implementing effective remote and hybrid instruction.
- » PDE leaders had confidence in the guidance they were providing to LEAs and the public.
- » Districts and schools prioritized the health and safety of students and staff by
  - › Establishing cleaning and mask-wearing protocols, reducing class sizes, and implementing symptom screening.
  - › Providing social and emotional wellness support to students through mental health counseling from community programs.
- » Schools prioritized vulnerable students.

**Impacts** from the Mathematica survey do not necessarily tie directly to the Roadmap, but do indicate how schools implemented learning models and served students during the 2020-2021 school year. Those impacts include the following:

- » In-person learning expanded as the 2020-2021 school year progressed.
- » Students received similar amounts of synchronous instruction in full remote learning and in hybrid learning.
- » Most students had supports and technology for online instruction.

- » LEAs reported that the pandemic posed challenges to providing services to students served in special education despite prioritizing them for in-person instruction.
- » Access to reliable internet was the largest barrier to remote and hybrid learning.

The culminating activity for the Roadmap team and special group was to create a pitch to advocate for the next phase of the Roadmap—[Accelerated Learning Through an Integrated System of Support](#). The pitch created by both groups provides a tight explanation of how PDE is evolving from their approach to education continuity to the next phase of their work in accelerating learning for students. Their pitch can be found below:

**“On the Road Again.....Using The Creating Equitable School Systems: A Roadmap for Education Leaders”**

Schools are continuing to navigate the impact of COVID-19 and in particular, opportunity and learning loss. In addition, the education K-12 system has seen tremendous turnover in leadership, educators, and support staff. In the 2020-2021 school year, PDE provided *The Creating Equitable School Systems: A Roadmap for Education Leaders* to aid LEAs in their practices and current circumstances. The *Roadmap* has evolved to the PDE “*Accelerated Learning Through an Integrated System of Support*.” This framework offers tools, resources, and research to provide new professional learning to reimagine the foundation of education.

To operationalize this framework, PDE will provide a new professional learning series to bring together LEA teams to plan and execute strategies for accelerating learning. This new series facilitates teams to: (1) take lessons learned the past 3 years; (2) restore the basic foundation found to be effective for student learning; (3) create new structures and instructional practices, all within; (4) a positive and engaging learning environment.

The [Accelerated Learning](#) section of the PDE website contains a host of support resources for this new phase of work, including the following:

- » Accelerated Learning Toolkit
- » Accelerated Learning Webinar Series Resources
- » Checklist of Accelerated Learning Sessions
- » Planning Template—Executive Summary and Full Version
- » Recording Accelerated Learning Webinars
- » Guided LEA walkthrough workshops to develop LEA-specific plans to address Learning Gaps and positive school environments (Summer 2022)

## AAR Follow-up

Feedback from a follow-up call with PDE Executive Secretary Deborah Carrara and a survey delivered to the participants provided useful impact information on the AAR as well as potential



next steps the team might consider. The survey provided useful feedback but only yielded a 47 percent response rate; likely attributable to the staff being extremely busy addressing pandemic and legislative issues. From those two sources, meeting participants stated the following:

- » The meeting was beneficial and time well spent.
- » Team members enjoyed examining their work through the various “buckets” outlined on page 1, and several team members cited interest in using a similar format for their own work.
- » Participants found the collaborative activities to be beneficial.
  - › Several participants had never interfaced with each other
  - › The evaluation and communication leaders provided great value-add to the meeting.
- » The telework team felt they had a valuable end-product through the pitch they created.

Other outcomes included a list of questions for both the telework and Roadmap groups that might provide useful insight or data on the impact of their work. One potential next step could be for PDE staff to review the questions and consider if there are existing data sources to answer those questions, or whether they can collect data to answer them through their own evaluation department or other partners.

Another outcome would be to see if PDE staff felt they were better positioned to advocate for their permanent telework plan during the most recent legislative session. PDE Secretary of Education, Noe Ortega, suggested he could share documents provided to the legislature with the National Center AAR team to see how much of the pitch created by the telework team in the meeting was used to inform legislators about outcomes and impacts of the plan.



## Appendix A

### Telework Elevator Pitch

We are facing a lot of changes and unknowns. To a certain extent and in some instances, some of us have been here before. In other cases, this is new territory. Over the past 20 months, we have done a great job transitioning the PDE team to working from home, at least part of the time.

In fact, in a survey that almost 90 percent of employees responded to, a vast majority have described their telework experience as “good” or “great.” This is a major kudos to our agency, which got people up and running in this new way of work in less than a month!

As we continue teleworking, we expect to see continued benefits both as an organization and as individuals, and we expect that future survey and data collection will help us to continue to evaluate the policy’s effectiveness. At the end of the day, we will treat our colleagues as professionals, and we will cheer them on as they rise to the occasion.

We will keep the communication loop open and provide continued space for employees to express their needs and expectations through ongoing surveys, engagement, and outreach. We will continue to build on our guiding principles of equity and transparency as we support both our team—and the field—along this journey.

There may be some individuals who do not believe that the work can still be done outside of a traditional office set-up. In fact, prior to the pandemic, that used to be the mentality of PDE Senior Leadership! However, there are checks and balances in place to ensure that the work is being accomplished—from deadlines to inquiries from the field and General Assembly, and compliance with regulations set forth in state and federal statute.

PDE does not just stand for the Pennsylvania Department of Education—we could also say it stands for Professional, Dedicated, and Engaged. Our team is and always has been the true definition of public servants, and the pandemic did not change that.

If we revert course and go back to full-time in-office work, we are likely to see a reduction in happiness, motivation, and enthusiasm. Survey data shows us that, currently, PDE is satisfied with this new way of doing business. Additionally, reverting back would also mean saying goodbye to 21st Century hiring practices whose flexible geographical boundaries enabled us to recruit and retain more diverse and uniquely skilled staff members.

Rest assured, continued investments in employee feedback and engagement will carry on as we move forward, and we will tackle each new step in this journey together as a team.

Your work is critical to the future of Pennsylvania’s education system and workforce. What you do today—whether you do it from a cubicle or a kitchen table—is building a better tomorrow for all of our commonwealth’s 12.8 million residents.



On behalf of Pennsylvania’s learners, educators, and communities, we thank you.

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