



Leadership and Policy Guide for the Next Stage

A guide for education leaders on how to transition from emergency response to education transformation



Preface

The purpose of this document is to provide practical guidance to Education System Leaders on how to plan for transition from distance learning during crisis to transforming to new hybrid models of teaching and learning and ensure that investments in technologies continue to be optimized for ongoing continuous improvement of education systems and student learning.

If your education system has implemented Microsoft O365 to ensure continuity of learning through distance and hybrid learning, you should consider how you can leverage many of the apps in O365 as part of ongoing communications and collaboration across your system.

Related documents:

Remote to Hybrid Learning

A position paper and resource on the shift from remote learning to hybrid approaches including frameworks and school-opening guides.

<http://aka.ms/HybridLearningPaper>

Technology Blueprint

<http://aka.ms/MSFTTechBlueprintDistanceLearning>

Teaching and Learning Training Plan

<http://aka.ms/MSFTTeachingLearningTrainingPlan>

Strategic Planning Guide

A Guide for Primary and Secondary Education Systems to Implement Distance Learning, in partnership with UNESCO Global Education Coalition

<http://aka.ms/MSFTDistanceLearningStrategicPlan>

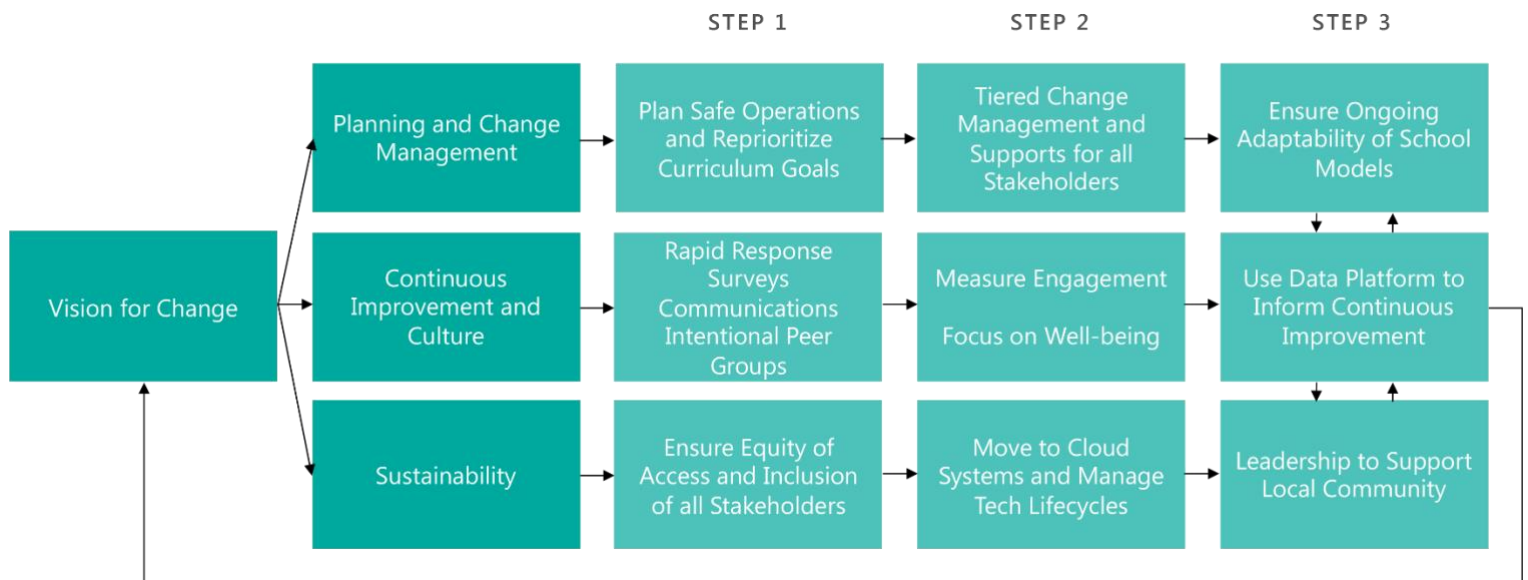
Leadership Courseware

Leading the School of 2030:

<http://aka.ms/LeadingSchool2030course>

Education System Transitions

Leadership and Policy Steps



Overview of Leadership and Policy Guide for the Next Stage

As the global crisis of COVID-19 begins to abate, Microsoft is working closely with education systems around the world to support transitions to the next stage of schooling. This document outlines how the new technologies implemented during the crisis can continue to be used to support transitions back to school and to improve and reimagine schooling going forward.

Most countries will continue working towards full connectivity distance learning readiness during the transition back to school to ensure all students have connected devices for seamless learning. These efforts will ensure all students can participate in distance and hybrid learning should there be need to close schools again in the coming months and years.



No or low connectivity

Broadcasting basic national curriculum

Emerging connectivity

Asynchronous classes using digital online curriculum on mobile phones or devices, with intermittent teacher-student communications, and attendance reporting

Full connectivity

Live online class meetings with complete national curriculum, student and teacher collaboration, and student grades and engagement reporting

Every education system will have a mix of readiness including all three stages of distance learning, with some schools at the “Full connectivity” stage, some at the “No connectivity” stages, and the majority of schools in the “Emerging connectivity” stage. Ministries of Education or local education system leaders will be working to envision clear scenarios for hybrid learning (where some students are in schools and some are learning remotely) and for a reimaged model of schooling.

Vision for Change

One of leaders' primary roles is developing a clear vision of the scenarios for teaching and learning they want to achieve going forward. During the global pandemic, the urgent need for digital transformation in our education systems has become a priority to ensure continuity of learning for all. Significant progress towards enabling distance and hybrid learning has been made in many countries around the world, from increasing connectivity and providing devices to students to ensuring students have access to learning platforms and digitalized curriculum resources. Those investments offer an opportunity to strengthen learning systems going forward.

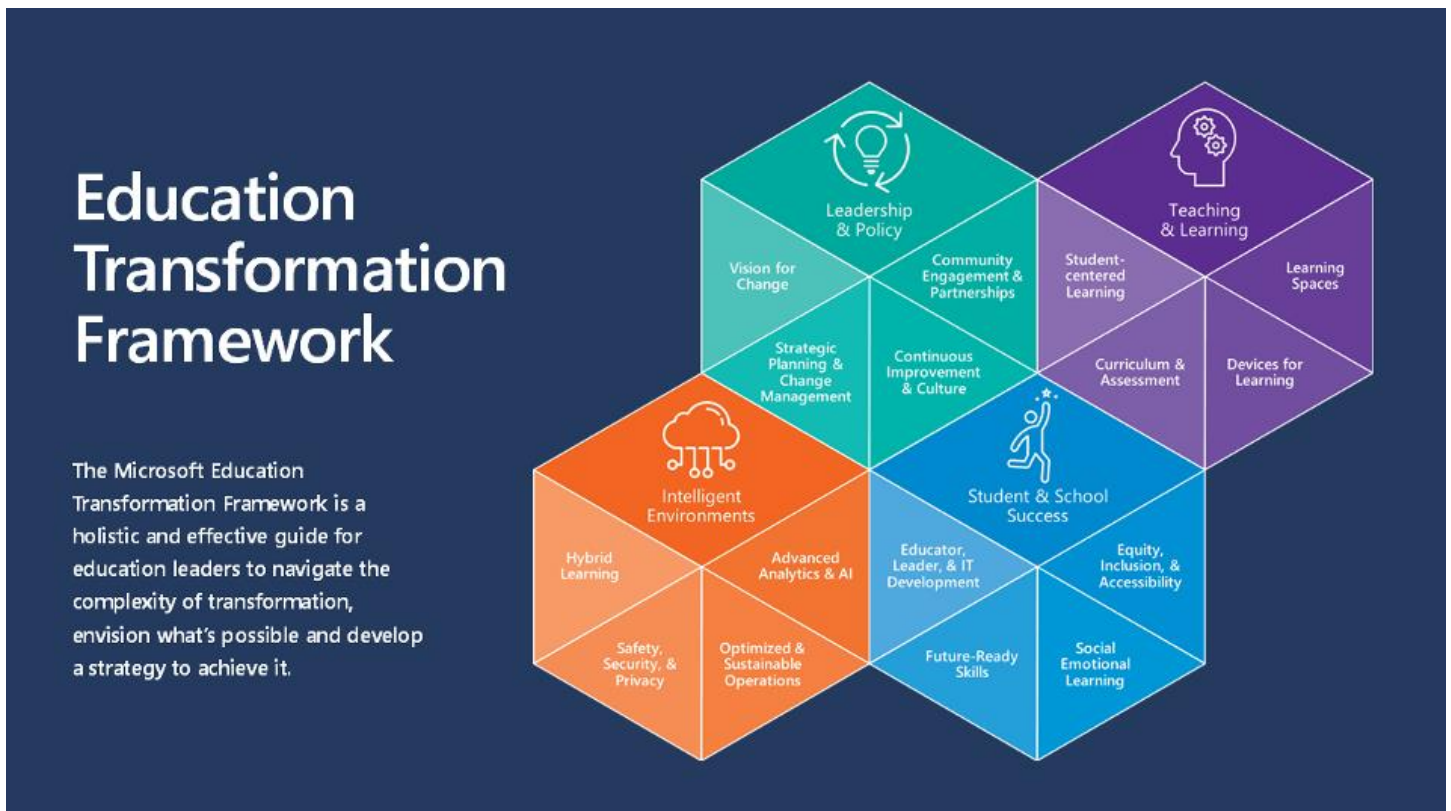
Many excellent documents have been developed to guide policy makers and system leaders in transitioning from distance learning only during school closures to hybrid models of learning that will likely be needed over the next year or longer.¹ This document builds from those, offering practical guidance for using technology intelligently and sustainably going forward. Schools and education systems can leverage the tools and solutions they have recently deployed, such as O365 and Microsoft Teams to support the next stage.



¹ See in particular, UNESCO's [Global Education Coalition](#), OECD's ["A framework to guide an education response to the COVID-19 Pandemic of 2020,"](#) and New Pedagogies for Deep Learning's [Re-imagining Education: from remote to hybrid learning](#).

This document aligns to the categories of leadership and policy outlined in **Microsoft's Education Transformation Framework**, a research-based model that encourages systems to consider all the elements needed to plan and implement effective change:

Figure: Microsoft's Education Transformation Framework <http://aka.ms/etf>



If your education system has implemented Microsoft O365 to ensure continuity of learning through distance and hybrid learning, you should consider how you can leverage many of the apps in O365 as part of ongoing communications and collaboration across your system

	Students	Teachers within a school or a set of schools	All schools' staff across a system	Families and guardians
Microsoft Teams	Class collaboration Peer collaboration	Class collaboration Professional learning	Staff collaboration Live Meetings	Weekly updates on students
Outlook Email	Formal communications	Formal communications	Formal communications	Formal communications
Stream	Safe and secure video recordings	Safe and secure video recordings	Safe and secure video recordings	
OneDrive	Personal file storage	Personal file storage		
SharePoint	School and system websites	Shared file storage School websites	Shared file storage School and System websites	
Yammer	Whole-school collaboration	Whole-school collaboration	Collaboration across large communities	
Forms	Surveys, quizzes	Surveys, feedback tool	Surveys, feedback tool	Surveys, feedback tool
Planner	Plan projects	Plan projects	Plan projects	
Learning Tools	Immersive Reader Microsoft Translator	Microsoft Translator for student and parent communications	Microsoft Translator for parent communications	Microsoft Translator for parent communications

Below, we outline in more detail how some of these applications can be used in specific back to school scenarios.

Planning and Change Management

Planning and change management focuses in designing and managing the transition process, including considerations for people management, budget, schedule, scope, communication, and resources. A solid plan, communicated well, will help individuals understand 'why' change is critical and what their role is in the change process.

As education systems transition from distance learning back to school, three steps of planning and change management will be essential.



Step 1: Plan Safe Operations and Reprioritize Curriculum Goals.

Planning is the first step of transitioning back to school and can begin with designing the scenarios for school-wide teaching and learning processes that will ensure health and safety through continued social distancing, new hygiene habits and continuity of learning for all.

- **Safe Operations:** Publish and train staff on protocols for safe school operations and behavior changes to ensure healthy practices.
 - **Tools that can be used:**
 - [Microsoft Teams](#) meetings to communicate and coordinate planning remotely, establishing channels for different working groups.
 - Plans can be published to the staff and easily updated in Staff Notebooks in [Staff Teams](#).
 - [Microsoft Planner](#) can be added as a tab to a Staff Team to let everyone know what tasks they need to do.

- **Reprioritize Curriculum Goals:** For distance learning and hybrid learning, it is essential that educators and students learn the specific skills needed to succeed in these new contexts. These contexts require everyone to have knowledge of how to use technology for learning, skills for independent study and self-management, and social and emotional competencies to ensure their own personal well-being. The transition offers a unique opportunity to reprioritize some curricular goals. Educators will need to quickly adopt [new methods for engaging students in learning](#) and [new assessment strategies](#) that are valid and reliable in distance and hybrid learning contexts. As the “new normal” sets in, training in more advanced technology skills will become more important for secondary and post-secondary students to ensure they have the foundations for work in the emerging remote work landscape.
 - **Tools that can be used:**
 - **Digitizing Curriculum:** Office Lens, OneNote, Word, PowerPoint, Sway and Excel (all part of O365 suite).
 - **New curriculum priorities:** basic use of [technologies for distance learning](#), skills for independent study and self-management, [social and emotional learning tools](#), and more advanced technology and data courses such as those from [Microsoft Learn](#) and [LinkedIn Learning](#).
 - **Tools for Assessment:** [Teams Assignment Rubrics](#) for writing, project based-learning and skills development; [Microsoft Forms](#) for frequent formative assessments; Flipgrid and Stream Video Recording for self and peer assessments.

Step 2: Tiered Change Management and Supports for all Stakeholders

Once the transition plan and curriculum priorities are developed, leaders can start the change management process by assessing the readiness of different stakeholder groups (e.g. using Forms surveys), identifying early adopters and groups at risk, and designing supports for each group to ensure all learners and educators are effectively included in the transition. It will be especially important to continue to monitor equity of access to connected devices for all learners and rectify gaps.

Identify early adopters, such as teachers who have succeeded in remote learning, and asking them to collaborate with other teachers to show them the methods and approaches used. An example of using Microsoft Teams to support groups of teachers in adopting new practices is described in [this whitepaper](#) from Catholic Education of Western Australia.

- **Tools that can be used:**
 - Microsoft Teams “[Live Events](#)” to broadcast plans to whole communities during a large-scale synchronous meeting.
 - [Microsoft Forms](#) to conduct readiness surveys of groups such as educators, parents, students and the broader education system staff and community.
 - Microsoft Teams, establishing teams for different groups such as early adopters to collaborate and share ideas and examples, collaboration teams for teachers seeking ideas or solutions to specific challenges (e.g. math teachers, special education teachers); and small teams for students with teacher mentors or advisors to have frequent personal interactions and ensure special supports (e.g. food delivery, special services) are provided and engagement in learning is maintained for all students. Solutions like [Immersive Reader](#) and Microsoft Translator can be used both within Teams and across the O365 suite to support [different communication](#) and learning needs.

Step 3: Ensure Ongoing Adaptability of School Models

As systems fully transition to a future of hybrid learning, teaching and learning will evolve, and ongoing assessment of what behaviors and practices are effective and meaningful will be needed. Teaching and technology use scenarios will need to be continuously re-defined, with measures developed to assess their impact, and learning shared across collaborative learning communities.

- **Tools that can be used:**
 - Use the Education Data Platform (see below) to assess impact of different strategies on learning and well-being outcomes.
 - Microsoft Teams for ongoing collaboration and sharing of exemplars and best practices among communities of practice and learning groups.

Continuous Improvement and Culture

Culture is the bedrock of any organization or system, and the intentional development of a learning culture is essential to effective education systems. As systems transition to new modalities of teaching and learning, leaders should focus on empowering everyone to contribute to the cycle of improvement by building a culture of self-reflection, visibility into data on progress, collaboration on evolving solutions, and risk-taking. This series of steps in the transition focus on continuously monitoring new approaches or changes to the system and evaluating their impact to enable timely course correction and to glean insights on approaches that should be expanded.

Step 1: Rapid Response Surveys, Communications, and Intentional Peer Groups

Surveys can help you gather data to understand the evolving context of your system's stakeholders and their changing concerns and needs through different stages of the transition. Leaders should be in continuous communication with teachers, students and families to share key information and set clear expectations about how decisions are being made and what will happen at different stages of the transition back to school and during hybrid learning. Many systems are providing daily communication updates to all stakeholders during these periods of change.

Planning intentional peer groups both during distance learning and during hybrid stages of learning will be essential to ensure everyone has a sense of belonging to either a peer group or a class. This will be as important for teachers' well-being as it will be for students and even families. Many individuals will have experienced trauma during the lockdown, and the sooner relationships focused on learning and mutual support can be established, the more quickly healing can occur.

- **Tools that can be used:**
 - Microsoft Forms for ongoing feedback from all stakeholder groups.
 - [Recorded Meetings](#) shared via Stream to communicate key messages to all stakeholders.
 - Teams live meetings focused on relationship-building, not just academic or professional learning.
 - Flipgrid for thoughtful sharing and self-reflection of what was learned and experienced during lockdown.

Step 2: Measure Engagement and Focus on Well-Being

During periods of rapid change, when individuals have been socially disconnected, the major concern of many educators has been on the well-being of learners and their continued engagement in learning, including their level of motivation. Engagement and well-being need to be supported both through explicit curriculum and through tools and measures of these elements of successful learning.

- **Tools that can be used:**
 - [Class Insights](#) in the Teams Assignments service to monitor student engagement and digital activity.
 - Social and emotional learning solutions such as [SchoolDay](#) and [check-ins](#) on well-being.
 - Microsoft [Power Apps](#) can be developed to trigger notifications to educators and parents when students disengage from learning or when successes in new learning contexts are achieved and can be celebrated.

Step 3: Use Data Platform to Inform Continuous Improvement

Leaders need visibility across their systems into who and where engagement and learning is happening effectively, and where it is not. The need for this visibility increases during distance and hybrid learning when class attendance and engagement cannot be physically seen. Some schools and systems have established system-wide measurement platforms to be able to continuously monitor patterns of engagement and learning in digital environments. Fresno Unified School District in California is one such system and [this case study](#) shows how such a platform can work.

- **Tools that can be used:**
 - Beginning in the August 2020, Microsoft Education will launch a preview of the Education Data Platform that will enable education systems to continuously monitor engagement in the O365 digital learning ecosystem.
 - [PowerBI](#) can be used to develop new dashboards and analyses specific to distance learning and hybrid learning contexts, such as reports that correlate well-being measures with digital and physical attendance or engagement.

Sustainability

As education systems adapt to distance and hybrid learning, they have an opportunity to create a better and more sustainable future, by more intentionally balancing social, environmental, and economic interests of the school community – acting locally and thinking globally. This process begins with ensuring all teachers and students can do the work of teaching and learning remotely in an ongoing way, including planning for the longer-term lifecycles of devices and digital platforms. Sustainability can include technology decisions,

such as moving to cloud-based platforms and systems that have significantly lower impact on the environment. Finally, a sustainability strategy for the school should examine ways students and teachers can make a positive contribution to the local community through examining environmental practices or applying technology to improve the local economy in sustainable ways.

Step 1: Ensure Equity of Access and Inclusion of all Stakeholders

All stakeholders need to have access to connected devices from home to have continuity of learning in distance and hybrid learning contexts. In many cases, the gaps in equitable access that were revealed by school closings will not yet have been fully resolved when schools reopen. These gaps need to continue to be addressed so that 100% of students have access to connected devices, and the provisioning of that access is ongoing into the future. That 100% access will ensure that learning materials, information and tools for learning are accessible to all groups. Once this access is provided, all stakeholders can benefit from digital tools designed to help those with special needs or who might otherwise be marginalized.

- **Tools that can be used:**
 - For equity of access, see the [Technology Blueprint](#) document and templates for designing connectivity and devices plans for all.
 - [Inclusion Tools](#): Microsoft Translator, Immersive Readers, Dictation/Voice tools, Read Aloud feature in Word.
 - [Training](#) on building inclusive classrooms.

Step 2: Move to Cloud Systems and Manage Tech Lifecycles

Moving the digital infrastructure of your school or system to cloud based platforms and solutions is a step towards sustainability. Technology companies have made massive investments in their cloud 'server farms' to run them efficiently and this means technologies that run on the cloud are greener and better for the environment (in addition to the security, reliability, and lower costs of cloud solutions).

- **Tools that can be used:**
 - Cloud-based Student Information Systems such as PowerSchool, Capita, and Dynamics 365.
 - Cloud-based Learning Management Systems such as Canvas, Schoology, Blackboard and many others.
 - O365 subscription-based version of Microsoft Office.
- **Manage Technology Lifecycles**
 - Tools: [School Data Sync](#) to keep class rosters in Teams updated, [InTune for Education](#) to keep all devices securely managed and updated.

Step 3: Leadership to Support Local Community

As the world goes through rapid change, it's essential that school systems and curriculums include aims to create a better and more sustainable future for all, by balancing social, environmental, health and economic interests of school communities – acting locally and thinking globally.

- **Tools that can be used:**

- Develop [Service Learning](#) programs for students to engage in their communities.
- Teach [active global citizenship](#).
- Understand [sustainable development](#) and consider [whole-school approaches to sustainability](#).

