Leveraging Learning Out of a Crisis: Focused Journaling as a Precursor to Debriefing

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Abstract

This paper proposes a process that can be applied before, during and after a crisis through the use of an organizational messaging app in order to make certain that a district's strategic governance team (senior district leadership and elected board members) assesses what has been learned and applies those learnings for the benefit of the team and the district as a whole. A model for how to broach the idea of a reflective and collaborative digital forum and consensually move it forward is presented. An example of one possible approach that includes specific folders for reflections, new ideas and personnel follows. The article then discusses research on human memory and what can be learned from public health research concerning administrative communication during a crisis. It follows with a preparatory activity using the model for a post crisis debrief with an eye towards takeaways and lessons learned that compel new actions or investigations. The paper concludes that the proposed model can help leaders recognize and understand organizational cultural shifts, get ahead of them and give leaders a different lens through which to understand what really drives the people on their teams as individuals and the thinking that fortifies their guiding principles.

Key Words

reflective model, organizational messaging, communication, collaboration, leadership practices

The nation's post-pandemic tense social climate and sharp political discord have left Americans not only with frayed nerves but in a deep conceptual divide that began through mask mandates and much like the virus, quickly spread to other polarizing issues. In the fall of 2022, Jochim et al. (2023) found 51 percent of school district leaders nationally identified conflict over COVID-19 related matters, critical race theory, LGBTQ+ questions, or a combination of these issues as impeding their district's capacity to educate students.

As of the fall of 2021, in 45 percent of these districts there were increases in Freedom of Information Act (FOIA) requests (Jochim et al., 2023). Appeals for book removals or instructional opt-outs for contentious topics particularly in low-poverty districts also have become more prominent (Jochim et al., 2023). Finally, written or voiced threats to educators when covering polarizing issues in class content was reported in 31 percent of districts and more likely to occur in either low-poverty districts or places where the political preference of the majority locally ran counter to the larger state preferences (Jochim et al., 2023).

A more polarized public has consequently led to more polarized representatives. Kitchens and Goldberg (2024) found that although school board elections generally feature candidates that do not affiliate themselves formally with a political party, the attitudes of many school board members reveal strong partisanship.

An analysis of board actions in the context of school reopenings in the fall of 2020 indicated that politics, teacher union power, and proximity to private school options were stronger predictors of the resumption of in-person instruction than the prevalence of the virus in a particular locality (Hartney & Finger, 2020).

These conflicts naturally have led to more contentious school board elections and ultimately more polarized boards. Research has found that a school district's culture is significantly impacted by the comportment of board members and the superintendent (Dennis, 2024). There is also evidence that when trust is an issue or there is a pattern of unprofessional behavior, student achievement can suffer (Dennis, 2024).

When dealing with frustrated and sometimes angry parents challenging library books, school resources, curriculum, restroom policies, and new initiatives, it is easy to see how a district's focus on instruction can suffer. The increasing nationalization of these issues is also undeniable (Hartney &Finger, 2020) and has impacted where some of these battles are coming from. Today, such challenges do not always start with a phone call or email placed to an individual with institutional authority – nor do they always originate with parents. A snapshot or video on social media shared with an activist group can set off a firestorm that suddenly demands and consumes the time and energy of school board members and district staff alike.

Beyond that, there are many other forms that a crisis can take in a school or school district -- from the sudden loss of a staff member to the emerging awareness of a past event that brings lingering negative attention to the organization, from a school where there is widespread and unremitting failure in student achievement to a community that is suffering the shock and heartbreaking devastation of a school shooting. Generally, when we think of the term "crisis" we assume that there's a certain level of imminence requiring swift attention to relieve the calamity -- but sometimes the immediacy is not seen and other times when it is, the appropriate response is not clear.

Defining Crisis

The definition of the term crisis as it would apply to an organization, includes, "… an emotionally significant event or radical change of status…" or, "…an unstable or crucial time or state of affairs in which a decisive change is pending…" particularly when it may have, "…the distinct possibility of a highly undesirable outcome" (Merriam-Webster, n.d.).

Although most crises are relatively short-lived, some will extend for days or possibly weeks. When a crisis like the COVID pandemic extends far beyond weeks, the situation morphs from crisis to a new state of existence. Whatever the case may be, based on the definition offered, the key characteristics of crisis can be said to include high emotions, uncertainty, and concern or fear of an outcome. These are precisely the same dynamics that cause people in organizations to resist change (Hubbart, 2023).

Don't Let a Crisis Go to Waste

A crisis is an opportunity. It precipitates new circumstances and problems that demand considering different ways of doing things. Leaders have a responsibility to develop their organization's capacity to make sense of emerging circumstances, learn, and grow.

The refrain of, "Don't let a crisis go to waste," has been credited to both British Prime Minister Winston Churchill (Phillips, 2021) and former Obama Chief of Staff Rahm Emanuel (Weidinger & Sprunt, 2022), both of whom understood crisis and how it creates a certain malleability in discourse when searching for solutions. For this context it refers to the organizational payback that can be netted from reflection in the aftermath of a crisis.

One form of reflection is debriefing. Research shows that quality debriefing is an "informative dialogue" and a "dynamic action"

that develops reflective, problem-solving skills and helps individuals understand their thought process and the thought processes of others with an eye to sharpening judgment and reasoning (Bradley et al., 2020).

However, the practical circumstances and behaviors that accompany the beginning and ending of a crisis often conspire against meaningful reflection. Just as quickly as a crisis hits, it abates – and with it the individuals who were charged with managing the situation move on, highly driven to catch up on work that has accumulated through the emergency. Given this challenging environment what strategies can be employed before, during, and after a crisis to make certain that a school or district leadership team assesses what has been learned and applies those learnings for the benefit of the team and the district as a whole?

The research of Nansubuga and Munene (2013) on adaptability to turbulent work environments through reflection can be foundational in the formulation of a practical answer to this question. The authors found two specific processes for developing an individual's capacity to examine the emerging conditions they face, draw conclusions and formulate responses tailored to those conditions. These processes are "adaptability to [the] work environment" and "reflection" where the latter serves as a key facilitator of learning new strategies for the former.

In their work with Ugandan public service leaders in district local government, the authors found adaptability consists of "environmental scanning" and "interpretation and planning". Nasubuga and Munene (2013) relied on Choo (2001) to define environmental scanning as "… obtain[ing] information about events, trends, and relationships from the organization's external environment and us[ing] that information to plan a course of action that will respond to the work

environmental changes" (p. 167). "Interpretation and planning" was based on efficiency and responsiveness and consisted of recognizing "changing community needs and program-related critical issues (social, political, and cultural)," as well as, "identifying beneficiaries' strengths, weaknesses, opportunities, and threats; and involvement of clients in setting of goals and measurable objectives that address the critical issues" (Nasubuga & Munene, 2013, p. 166).

With respect to measures of reflection, the research of Nasubuga and Munene (2013) found four variables: "proactive thinking, framing and reframing, action profiling and unlearn and relearn" (p. 166). The authors applied the definition of Parker, Bindl and Strauss (2010) for proactive thinking, which they described, "as an ability to take control and make things happen rather than watching things happen" (Nasubuga & Munene, 2013, p. 166).

"Proactive behavior" includes hands-on refinement and enhancement of approaches to work, preemptive problem solving, taking initiative, "making ideals and proactive feedback seeking…anticipating events and thinking ahead in terms of averting future challenges, as well as instituting plans for mitigating the anticipated challenges" (Nasubuga & Munene, 2013, p. 167). "Framing and reframing" consists of simplifying complicated issues through formative performance assessment which empowers individuals to set personal improvement and growth goals based on past accomplishments.

Throughout this process, an individual will seek meaningful conclusions through their observations to solve problems. "Action profiling" refers to individuals using the experience of their workplace interactions to "define knowledge and skills" of others for the purposes of constructive assessment that will

allow for precise feedback yielding improvement. "Unlearn and relearn" gauges an individual's responses to problems and their methods for dealing with problems with an eye towards analyzing trends or patterns in their behavior that provides predictive insight to how they process adversity. (Nasubuga & Munene, 2013).

The Nasubuga and Munene (2013) study proved that the reflection process is strongly related to an individual's adaptability to their work environment. More specifically, the study identified both the interrelated nature of "proactive thinking", "framing and reframing" and "action profiling" to "environmental scanning" as well as the interconnectedness of "unlearn and relearn" to "interpretation and planning" (Nasubuga & Munene, 2013).

What follows is a proposal for a system of digital dialogue at a senior administrative level that structurally reflects the relationships at play between reflection and adaptability to make certain that a school or district leadership team assesses what has been learned and applies those learnings for the benefit of the team and the district as a whole.

Organizational Messaging

Organizational messaging apps like Microsoft Teams, Slack, and a host of others have become a regular part of the workplace environment. They provide quick messaging, easy collaboration tools and document storage. They also provide a vehicle through which individual reflection can be used as a powerful point of entry to a collaborative dialogue.

Before the Crisis
Broach the subject
At a district level, the Superintendent/CEO would be wise to open a conversation individually with members of the cabinet and

the Board chair regarding the launch of a digital forum for reflection and collaboration.

- Start the conversation by recalling a past crisis and the value of a structured and easy method for collecting one's thoughts.
- Discuss the idea of a digital framework within the organizational messaging app.
- Be clear about its purpose as an open and safe forum for reflection, dialogue, and collaboration to chart a way forward.
- Solicit opinions concerning what people believe would work and what would not.
- Apply those opinions to help develop any ground rules that may be necessary.

Put the digital forum on the agenda

After discussions have been held and feedback has been considered, develop a presentation demonstrating where exactly the forum will reside, what it will look like and how it will work. At this stage, the folders and files could be set up as part of the demonstration.

- Be clear about its purpose.
- Check if what people see matches their expectations. Gather feedback for further adjustments.
- Discuss an implementation date.
- Open the door to a non-crisis "test drive". This could be a low-profile, non-controversial issue that nonetheless requires some time, consideration, and a solution.

Open the dialogue and let the reflection begin

Once consensus has been reached, put the digital framework in place and start reflecting. The Superintendent/CEO should be attentive to the emerging content and follow up where

necessary, as necessary to refine the discussion, probe deeper or encourage the path to adaptive decisions. Miciak (2021) advocates for reflection as, "…a key competency for advancing evaluation practice because it helps us improve our responses to situations and contexts, both in the moment and afterwards" (p. 102). There is also evidence that the act of writing can lead to reflection and that this can help develop an individual's "autonomy, metacognition, critical evaluation, and self-awareness" (Boutet et al., 2017, p.11).

Reflection space could be designated for issues within the larger topic at hand where an individual could start their post or entry by naming the issue and following with their reflection. Conversation threads can be developed for each issue raised.

Encourage people to contribute in a variety of different ways including providing links to relevant reading materials, considering alternative approaches, drawing analogies to other matters within the organization that seem similar, delving into school culture, relevant decision-making processes, asking follow-up questions and anything else that sparks conversation. This would not displace the existing organizational decision-making structure but create a systemic means of opening conversations.

The posts can be as brief or as detailed and involved as the poster has time and thought for. They may be limited to a simple statement like, "I sense a growing apathy in our service responses to the community as a whole, which may have contributed to the emergence of our latest problem concerning Mrs. Smith's public statement at the Board Meeting." From there, the poster may return to expand on their thoughts after further reflection. In the meantime, others are free to respond to what they see or ask for clarification.

There are any number of ways to create reflective digital space within the organizational messaging framework based on what was learned from the research of Nasubuga and Munene (2013). Here are a few possibilities:

Taking initiative

One "folder" could be named "Taking Initiative". Based on "proactive thinking" as defined by Nasubuga and Munene (2013), this folder could include next level folders on "Refinements," "Ideals," and "Feedback." Within "Refinements" there could be three additional folders for "Policies," "Procedures," and "Practices."

These would be spaces where members of the administrative team could raise questions or simply start conversations with respect to how, why or where improvements might be made in any of these areas. For example, during COVID-19, many district protocols required anyone who felt unwell with typical cold and flu symptoms to stay home from school initially. This could give rise to an idea to test whether extending similar practices in a non-pandemic environment would ultimately lead to less transmission of cold and flu illness and a net gain in overall attendance, particularly in the typical November to February stretch of cold and flu season.

Discussion around this topic would likely revolve around both the methodology of data collection through the student information system and what post-pandemic illness protocols should look like. Other factors like post-pandemic practices for non-attending students could also be part of the discussion.

For instance, if the entire school was now using a common organizational messaging system, students who were going to be away for a day or two could be expected to keep up

with assigned work in part because they could now be connected to the class synchronously.

"Ideals" is a direct response to Nasubuga and Munene's (2013) assertion that "proactive thinking" included "making ideals." Next level folders could consist of "Alignment" and "Challenges." The "Alignment" folder could be used to discuss where policies, procedures and practices—or at a minimum the way something was being done needed to be more closely aligned with organizational ideals as expressed in its mission, vision, and strategic planning.

The "Challenges" folder could be a place for open discussion concerning whether an existing ideal or the way it was being defined operationally still was something that the organization wanted to continue to support. This could certainly be a dicey forum, but adaptability requires an ability to be critical and open to conversations that could lead to change. Nasubuga and Munene (2013) list "proactive feedback seeking" as a characteristic of "proactive thinking."

The "Feedback" folder is a good way to send the message to the leadership team that listening is important and seeking feedback is encouraged. This is a situation where a lack of activity makes its own statement. If this folder were to stay empty for a long time, the Superintendent/CEO would certainly be justified in asking why. A simple prompt for this folder could be, "What do they think? How do they feel?" This ensures the conversation will include perspectives rooted in logic and reason as well as emotion and concern for others, both sides of the Myers-Briggs Type Indicator (NERIS Analytics Limited, 2024).

Problems

A second major folder could be labeled "Problems." This folder has several

foundational influences from Nasubuga and Munene's (2013) work. "Proactive thinking," "framing and reframing," and "unlearn and relearn" all include indicators that are based on either problem solving, anticipation and avoidance (Nasubuga & Munene, 2013). Appropriately, next level folders in "Problems" could include "To Be Solved," "To Be Anticipated," and "To Be Avoided."

Helping people grow

A third major folder could be called "Helping People Grow." In Nasubuga and Munene's (2013) research indicators of "framing and reframing" include formative performance assessment for growth and goal setting, "action profiling" features constructive assessment culminating with precise feedback for improvement, and "unlearn and relearn" calls for behavior analysis for the purpose of predictive insight of how an individual processes adversity – all fundamental strategies for professional skill development.

Next level folders could include "Feedback" and "Personnel." Within the "Feedback" folder, there could be two additional folders "For Improvement" and "For Alignment" where the former would be used for discussing common skills and competencies that the administrative team would like to either develop greater staff capacities in or perhaps address an anticipated need for developing capacity due to a coming staff change. The "For Alignment" folder would be used to discuss practices aimed at creating greater consistency in constructive assessment practices. This might include streamlining assessment feedback terminology or sharing and broadening assessment feedback strategies within the administrative team.

Another folder that many organizations might find useful would be titled, "Personnel." The next level folders could be labeled "For Mentorship" and "For Mentoring."

The "For Mentorship" folder would include discussion concerning highly capable personnel who exhibit strong problem-solving skills, are efficient and responsive in their work product and interactions, capably manage their own professional development, set high standards for their performance and seek continued improvement (Nasubuga & Munene, 2013).

The "For Mentoring" folder would be for discussions in support of staff that have not yet reached the level of proficiency exhibited by the first group. The intent of this structure sets the table for mentorship pairing, which could consequently lead to a third folder identifying the pairs.

Any folder created for the discussion of personnel requires clear ground rules based on its specified purposes. In the post-pandemic period, matters of succession planning are at a premium, as organizational demands are outstripping the available talent pool for many districts.

There is clear evidence of a national teacher shortage which leads to administrative and other personnel shortages. A national study of the many factors that impact on the nation's teacher capacity estimated that as early as 2015-2016, the nation needed somewhere between 47,000 and 80,000 teachers to meet demands (Sutcher et al., 2019). Estimates for the teacher shortage in 2017- 2018 came in at 112,000 (Sutcher et al., 2019).

As well, school systems seem more agile in identifying different approaches to providing both direct education and indirect support services. Dallas ISD serves as one example of how school districts have used ESSER funds for innovative purposes (Education Resource Strategies, 2022). Crisis situations bring talent into view in ways that might otherwise not have shown themselves.

For these reasons, it is a good idea to have a forum for collecting and discussing what leadership team members learn about an employee's talents or capacity that may not otherwise be known. This is not the place for negativity or complaints about a particular individual. There are well-established channels for such issues and in a setting where one might be concerned about the possibility of this kind of discussion creating a forum for negative responses about staff, it would be prudent to review the processes in place for dealing with any individual staff performance matters with everyone involved in the reflective forum.

During the Crisis

Once a crisis is on, time becomes an even more scarce commodity than it is under normal conditions. School district and campus building administrative offices are high demand settings at the best of times. When an unexpected problem starts taking the oxygen out of the room, it is initially hard to see how there is a way to make time for reflection. However, as the mechanic from the old FRAM oil filter commercials would say, "You can pay me now or pay me later."

One recent study from the University of Toronto tested human memory capacity by asking subjects who had been exposed to a hospital audio tour to recall their experience. Two days after the tour, the average person recalled less than a quarter of what they had experienced (Diamond et al., 2020). Such work and what most of us know about our own memory capacity highlights the need for the Superintendent/CEO to find ways to keep what is collecting in the back of people's minds at the forefront of their thinking, especially throughout a crisis.

Taking the time to discuss, plan and create a digital structure to reflect on that which we experience makes an organizational statement, but doing the work to create routines

of mindfulness will be a critical point in establishing a culture of reflection amongst the strategic leadership team in the same way that the medical profession has cultivated the practice of deliberative reflection to increase a physicians' diagnostic performance (Mamede & Schmidt, 2022). It is also congruent with recent advice that has come out of public health administration recommending that communication in times of crisis needs to be effectual and based on clearly established communication guidelines (Remley et al., 2020).

The lessons learned from administrative communication during a crisis from public health suggests that routines should be leveraged to facilitate more broadly-based communication throughout the organization, using start and close of day "situational awareness briefings" between "preparedness staff" and emergency operations personnel to gather, organize and disseminate important information (Remley et al., 2020). This is good advice that educational leaders can use in their organizations as well.

The efficacy of a digital reflection forum at the strategic leadership level would be enhanced by making time for an awareness briefing to discuss postings either weekly or at a more immediate time when critical information comes to light. This will help to reinforce the commitment to reflection in leadership work. In the medical profession, where precision is at a premium, communication breakdowns account for 60-70 percent of significant patient mishaps. Not surprisingly, team situational awareness is seen as a vital prerequisite for optimal performance (Weller et al., 2024).

It is also true that often in a crisis, communication to the organization becomes limited or ceases entirely for a duration. This forum could well be helpful in regard to

assisting the leadership team in good communication with its stakeholders, a critical feature of leadership at all times but most particularly in difficult times.

No doubt, there are situations where not communicating may be necessary, but at other times communication stops when the high demands and pressures that senior leadership is subject to and the awareness that all communication in the time of a crisis is scrutinized conspire together to produce hesitancy. These circumstances cannot be an excuse for failing to communicate with timeliness and clarity.

Remley (2019) asserts six key principles to effective crisis communication that, in her experience, help develop trust, diffuse dissension, and build collaborative allies in the workplace. These principles, based on the Centers for Disease Control and Prevention's manual and tools on "Crisis & Emergency Risk Communication (CERC)" which Remley (2019) identifies are: "(1) Be first, (2) Be right, (3) Express empathy, (4) Promote action, (5) Show respect, (6) Demonstrate transparency." (Remley, 2019, p. 208)

After the Crisis

Beyond the routine reflection check-ins that take place throughout the crisis, it is important to set aside an appropriate amount of time afterwards for a final debrief. The main function of this meeting is to give people the opportunity to voice any thoughts that they think are of value in the context of, "So what? Now what?"

A good preparatory activity for this meeting is to get everyone to review the forum discussions, comments and journals with an eye towards takeaways and lessons learned that compel new actions or investigations. Of course, the nature of the crisis the organization

has just been through, and the normal ebb and flow of work will help inform when such a reflection should take place and what amount of time to commit to it. With this, there is some flexibility. Our recent work on human memory does indicate that while we may only retain a fraction of what we experience in a relatively short period of time, what we do recall is on average over 90% accurate (Diamond et al., 2020).

Organizational cultures are about the realities we create through the interplay between the nature of the work done, the processes that support the work, and the prevailing ethos. In my more than 30 years in the education profession, I have witnessed the cultural shifts and individual struggles that come to challenge what people within an organization believe is true and real, clarify what they will put their trust in and reveal what will erode trust between individuals.

Using our digital messaging infrastructures to make dialogue and reflection an intuitive way of bringing people together can help leaders recognize and understand those cultural shifts and get ahead of them. It can also provide you as a leader with a different lens through which to understand what really drives the people on your team as individuals and the thinking that fortifies their guiding principles.

Creating a space within a school or school district's organizational messaging app to have a collaborative dialogue is simple. Forming the relationships and trust between individuals that will precipitate the authenticity that generates a better sense of the most recent crisis and moves the organization forward productively is far more complex.

Regardless of where a school or district's leadership team or even some individual members may be in terms of their

relationships with one another, a reflective writing forum can be a means to improve communication and understanding which can significantly increase your team's capacity to serve its stakeholders. Reflection can influence how individuals act, evaluate and even how they experience. As such, it is the fulcrum through which personal change takes root and therefore worth pursuing.

Author Biography

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