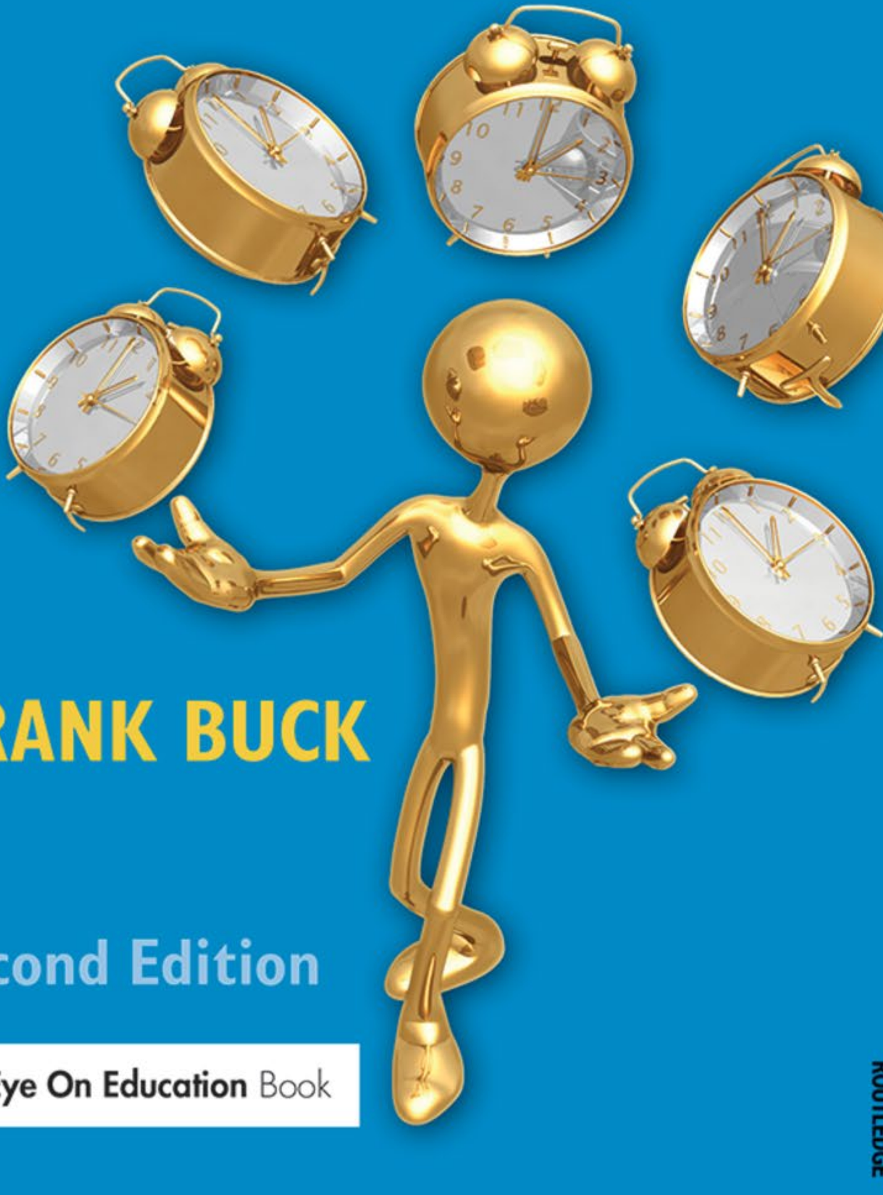
GET ORGANIZED!

Time Management for School Leaders



FRANK BUCK

Second Edition

An Eye On Education Book

Get Organized!

In today's world, we're often overwhelmed by our digital devices, stacks of paper, and constant interruptions. *Get Organized!* outlines a complete organizational system for the busy school leader. Providing you with simple tools and techniques to bring order and control to your personal and professional life, this book will increase your productivity and decrease your stress. With *Get Organized!* you can spend your time on what matters most—your school and your students.

Special features:

- Includes easy to implement ideas, at little or no cost—you can start right away!
- Each chapter contains practical tips and tools, listing exactly what to do in order to implement the strategy.
- This entirely updated edition provides digital strategies and tips for thriving in the Information Age.

Frank Buck is an education consultant to schools and businesses. He has served as a central office administrator, principal, assistant principal, and band director during a career in education spanning almost 30 years. Dr. Buck writes a weekly newspaper column, maintains an active blog, and regularly presents at national conferences, including ASCD, Learning Forward, AMLE, NAESP, and Staff Development for Educators.

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Time Management for School Leaders

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This book is dedicated to my wife and best friend, Davonia. Her love and encouragement over the last 26 years have been a constant source of joy and inspiration.

Contents

About the Author

Frank Buck served as a central office administrator, principal, assistant principal, and band director during a career in education spanning almost 30 years. He has served as an Editorial Advisor for the National Association of Elementary School Principals and has authored articles published nationally aimed at helping others become better organized and better managers of their time. The workshops, seminars, and webinars he has conducted over almost two decades have drawn rave reviews from those who have implemented the concepts he teaches.

Dr. Buck resides in Pell City, Alabama, and serves as a consultant to schools and businesses. He may be contacted for speaking engagements through his website: http://FrankBuck.org.

Preface

The original version of *Get Organized! Time Management for School Leaders* (Buck, 2008) has helped thousands. The comments from readers, groups who have conducted book studies, and university classes that have used it as a text, have made it clear the book was needed and hit the mark.

The methodology in the book is as sound now as when originally published. What has changed, however, is technology. We depend on our mobile devices. Software has changed. The “cloud” has become important in terms of how we store and access information. Publishing this second edition allows us to bring sound methodology and current technology in line with each other. Together with my website, FrankBuck.org, you learn enduring strategy together with what is new and significant.

This book focuses on a system for time management and organization that will continue to be sound far into the future. The first two chapters introduce a pair of tools: one paper-based and one digital. The next three chapters expand their use into every area of moving you toward your goals. Chapters 6–8 show you how to organize papers, digital documents, and digital notes. Chapter 9, subtitled “Mindy’s Math Dilemma,” brings all of the pieces together.

On any given page, you are likely to find an idea or technique you can use. The real value of this book is realized when you allow the concepts to build one upon the other into a cohesive system. Productivity goes up. Stress goes down.

The school leader needs the tools to make the complex simple. This book is about meeting that need.

1 Clear Your Desk

Ask, "When do I want to see this again?" and make it happen

What do others see when they look at your desk? Does it whisper "in control," or does it scream "overwhelmed"? More importantly, how do you feel at your own desk? Does it help or hurt your productivity? We envy the person who consistently works from a clean desktop and wish we knew the secret.

Is His Day Like Your Day?

The clock chimes 5:00 p.m., and Bill is nowhere near the end of a day that started 10 hours ago. Every inch of the desk is covered with stacks of papers, and they extend to the tops of the nearby filing cabinets and a nearby table. This folder sits on the desk's corner, serving as a reminder that it needs to go to tomorrow morning's data meeting. That proposal for the superintendent, due this Friday, sits incomplete on another corner. The stack of lesson plans obscured Bill's view of the family picture he so carefully placed on the desk the day he took the job. On the bulletin board behind him is the list of faculty birthdays. While he wishes he was sending cards to remember each person on their special days, he just never seems to look at the list until it is too late.

Under another stack of papers is a stapler that has been jammed for weeks, but Bill just doesn't have time to fix it. On top of that stack, three message slips serve as reminders to call parents. A padlock with a key broken inside it serves both as a paperweight and reminder to purchase a new lock.

Are You a "School Leader"?

Is Bill the principal, teacher, or perhaps the assistant superintendent? He could be any of those. He might be the assistant principal, department head, or even student teacher. Whatever his role, Bill is a *school leader*, a person with a dream of making a difference in his chosen profession. All around him are reminders of what he has to do, yet they merely serve as distractions that prevent him from focusing his full attention anywhere.

A "school leader" can be found holding any number of positions. The school superintendent fits into this category. Principals, assistant principals, and central office administrators are likely candidates. A school leader is also a department head who is balancing the role of teaching along with that of shaping the direction of a curricular area. A school leader is a classroom teacher who assumes responsibility for sponsoring a club or activity that benefits the entire student body.

In short, a "school leader" transcends job descriptions, and steps forward to shape the direction of what happens in schools. Once that first step is taken, the opportunities multiply. As the opportunities multiply, the tasks increase in number and complexity. Without intervention, the complexity can become overwhelming, enthusiasm gives way to stress, and potential goes unrealized.

Time: Friend or Foe?

Every good thing we do for our students, our school systems, our communities, our families, and ourselves is accomplished through the dimension of time. Each of us begins the week with a gift of 168 hours. How we use that time determines the success we will experience and the legacy we will leave.

When we begin to talk about what keeps us from getting our important work done, "lack of time"—time as the enemy, is the general response. Everyone wants a piece of the school leader's time. Fragmentation attacks the day. Evening comes, accompanied by the gnawing sense of being farther behind now than when the day began. That very feeling may be why you are holding this book, hoping to find a solution.

Time management is about doing what needs to be done, when it needs to be done, and having the necessary tools to do the task at hand. Get this part right, and the job not only becomes manageable, it becomes enjoyable.

For the school leader, time management is also about deciding how to leverage the help of others. Furthermore, it is about deciding what need not be done at all.

A Simple Solution

My father was one of those “clean desk” people. He was an attorney, but before you envision a staff that handled his every need, realize he operated in a one-man shop. He was his own secretary, bookkeeper, and receptionist. As a young boy sometimes accompanying him to work on a warm summer day, a particular technique he used caught my eye. It shaped the way I would approach paperwork from my first day as a teacher.

When he walked in the office, the first thing my father did was open a particular filing cabinet drawer. In that drawer were files numbered from 1 through 31. If today was the 15th day of the month, he removed folder number “15” from the drawer. Inside the folder were papers related to the various people he would see that day. His whole day, and every piece of paper he would handle, was contained in that one folder.

I thought my dad invented this system, and it was one I put into practice from my first day as a teacher, and have never left it. Later, I learned that it is an old tool from the business world called the “tickler file.”

Creating a Tickler File

The tickler file requires nothing more than 43 folders and a drawer in which to put them. Hanging files are best, and a hanging file drawer in the desk provides the convenience the system requires. Begin by labeling each folder with a numeral—1 through 31. Each represents a day of the month. Label the remaining 12 folders with the months of the year. Place the files in the drawer, and the system is ready to go.

The concept is simple. When paper arrives that you will need sometime in the future, ask the question, “When do I want to see this item again?” and drop it into the appropriate file. If the paper is going to be needed within the next month, slip the paper into the correct numbered folder. A piece of paper dropped into folder “17” will resurface on the 17th day of the month. Drop papers that need to reappear more than a month in the future into the correct *monthly* folder. The paper not needed until sometime in November is filed in the "November" folder.

At the end of the month, the folder for the next month will have worked its way to the front of the drawer. Empty it into the 1–31 folders. For example, at the end of February, open the "March" folder, and ask the question about each item, "What *day* in March do I want to see this paper?" File each item for the desired day.

The Tickler File in Action

Let's begin with a common example. Imagine receiving the memo outlined in Figure 1.1.

This job actually has two parts:

1. Complete the form.
2. Bring the form to the meeting.

Completing the form could probably be done on the spot. In fact, if a task will take only a few minutes to complete, complete it when it first appears. If you are going to take the time to look at it, take the time to finish it. You eliminate the time you would otherwise spend to re-familiarize yourself with it later.

The second part of the task is the one that causes the trouble. The form is complete and today is only Wednesday. What are you going to do with this piece of paper between now and Tuesday of next week?

Memo

To: Teachers

From: Principal

Please complete this form and bring it with you to the faculty meeting on Tuesday.

Figure 1.1 Memo to Teachers

In all too many classrooms, boardrooms, and offices, the drill resembles the following scenario. You think, “I’ll just put this paper on the corner of my desk so I won’t forget about it.” For the next half-day, that paper is moved around in an effort to find other papers under and around it. You look up from the current work countless times and see that piece of paper, each time thinking about how you must remember to take it to the meeting next week. Just after lunch, a student places a piece of homework on top of it. You have just experienced the beginning of the end.

By Tuesday, this piece of paper is buried seven layers down and has not received a second thought in days. You leave for the faculty meeting, and guess what is still buried on your desk? You then realize dropping papers on the corner of the desk doesn’t work.

The next time, you try a different approach. “I’ll tape it to the wall,” you think. “That way it won’t get lost.” You leave for the faculty meeting, and where is the form? More than likely, it is still taped to the wall. One of those little rules of life is whatever is taped to a wall simply becomes part of the decor!

There’s an easier way. The memo needs to resurface on Tuesday. Drop it in the tickler file that corresponds to Tuesday’s date. At that moment, you earn an important right—*the right to forget about it*.

That paper is out of sight and out of mind. It’s not cluttering the desk or decorating the wall. On Tuesday morning, you pull the folder for that day and dump it on the desk. There is your form, along with any other papers that at some time in the past you wanted to return on that particular day.

Other Examples

What else might you put in the tickler file? The uses differ by person and position. Here is a starter list:

1. Tickets arrive for an event that occurs three weeks from now. Drop them in the file corresponding to the date of the event. On that date, the tickets appear. No need to add them to an already-cluttered purse or wallet. No need to place them in some random drawer and hope you remember where to look later. With the tickler file, those tickets disappear and then resurface on just the right day.

2. Birthday cards need to be purchased for friends and relatives. Buy all of them with one trip to the card shop. After arriving at home, address all of the envelopes and attach return address labels to the whole batch. In the spot where the postage stamp will later go, pencil the date each card needs to go in the mail. Drop the cards in the appropriate tickler folders. Throughout the year, cards will appear on the exact days they need to go in the mail. Sign the card, seal and stamp the envelope. Drop it in the mail. You will never forget a birthday again!
3. A flyer arrives outlining the driving directions for an upcoming workshop. You will need that item on the day of the workshop, so put it in the tickler file. It will appear the morning of the workshop.
4. While completing a report for one of the committees of which you are a member, you see that you do not have all of the information needed. Rather than allow the report to sit on the desk, add to your task list what information you need to obtain and make a plan for how you will get it. Slip the report into a tickler file for several days in the future. When the report resurfaces, complete it using the newly gained information.
5. You sponsor the school play. As part of your publicity, you compose a series of messages for the school's morning announcements, each one growing in enthusiasm as the date approaches. Batch the task. Write all of the announcements in one sitting. Then, file each one in the tickler file for the appropriate day.
6. The test you will give next week is prepared and ready to duplicate, but the copier will be out of order until Thursday. Drop the test in the file for Thursday. It will be out of sight and out of mind until the day you can do something about it.
7. Thursday arrives and the test is now duplicated, even though you will not give the test until Wednesday of next week. After all, that copier could go down again. Put the tests in a manila folder and place the whole folder in next Wednesday's tickler.
8. Make-up work is being submitted, and you wish to grade it all in one batch. Pick a day for this task. As make-up work rolls in, throw it in the folder for that day.
9. You wish to pay all of your bills in one sitting a couple of times per month. As they arrive, throw them in one tickler folder. When that date arrives, all of your bills are there.

10. A wedding invitation arrives in the mail. "I must buy a gift," you say, and decide Saturday is the day you want to do so. Drop the invitation in the tickler file for that day. On Saturday, seeing the invitation serves as a reminder to buy the gift. After purchasing the gift, drop the invitation in the tickler file for the day of the wedding. On that day, you have a confirmation of the time, address, and name of the groom.
11. You resolve to get better about expressing gratitude toward others, yet every time you think about writing a note, you have no note cards. In January, scatter 52 blank note cards throughout your tickler file. About once a week, a blank note card surfaces, and it serves as a trigger to stop right then and take a moment to write a thank-you note to someone. Others begin to think of you as more thoughtful. Actually, you have always been thoughtful. You were just forgetful.

On those hectic days, the best of intentions often fall prey to the worst of interruptions. That's why we need simple systems. Figure 1.2 illustrates how the tickler file will look. In this example, the date is October 10.

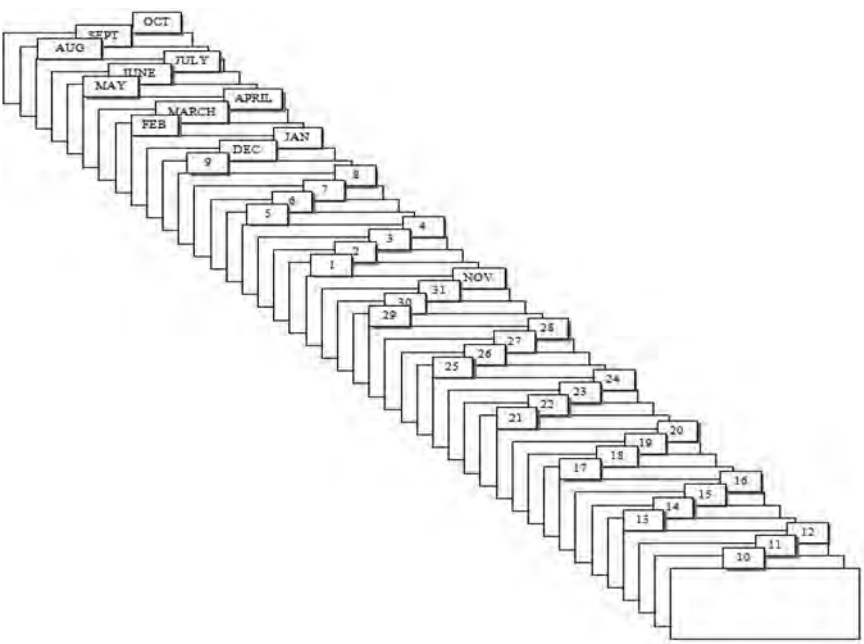

Figure 1.2 Example of Tickler File

Since today is October 10, the "10" folder will be in the front of the drawer. Empty the contents on the desk. Place the "10" folder behind all of the numbered folders, right behind folder "9." This file now represents *November* 10. Notice that the file for the next month, "November," sits as a divider between those files that represent days in October and those that represent days in November. In addition, once November 1 arrives, the "November" folder will be in the front of the drawer, serving as a reminder to divide its contents among the 31 folders behind it. On the desk will be all of the papers that at sometime in the past you had decided you wanted to see on October 10.

Forgetting Is a Good Thing

Much of the stress in life is related to trying to keep track of all we have to do in our busy lives. When we complain about "one more thing to have to do," the real problem is not what we have to do. Instead, the problem is having one more thing to *remember* to do. The tickler file handles the remembering. You make the decision as to when you want to see an item again, and your system makes it happen.

In fact, the entire system outlined in this book will require you to remember *exactly two things*. *One* of them is to check the tickler file. The second is to look at the *signature tool*, which you will explore in the next chapter.

The Paper Workflow

The tickler file provides the initial step toward a clean desktop. During the day, however, every professional will deal with three types of paperwork and needs places to put them:

1. Newly arrived paperwork.
2. Papers completed that now need to go to somewhere else.
3. Papers from today's tickler file that cannot be completed immediately.

We need a place to put each type of paper. We will refer to those places as *In*, *Out*, and *Pending*.

In: The Place for the New Arrivals

The nature of our work includes papers coming our way throughout the day. Give your attention to each new arrival, and you will accomplish little. Allow the papers to accumulate, handle them in one batch later in your day, and you have a fighting chance to focus on worthy projects.

In provides a place for incoming paperwork. During the typical day, a variety of items arrive:

1. Today's mail.
2. Memos from others in the school.
3. Notes from parents.
4. Phone messages.
5. Papers to sign.
6. Reports to review.
7. Papers to grade.

Each item has one thing in common: *It is untouched*. *In* does not serve as a pile of papers to push from one side of the desk to the other. It serves as a holding tank, allowing you to focus your energies appropriately until you are ready to make decisions on those new arrivals.

My favorite location for my *In* was a letter tray next to my administrative assistant. Anything intended for me went *there*. If you have a good assistant, he or she can examine its contents, discard the junk, handle what he or she can, and present the remainder to you in priority order.

For the teacher, *In* could take the form of a large bin on a table beside the desk or an empty desk drawer. During the day, the teacher collects sets of papers. Immediately placing the set in a file folder and throwing it into *In* keeps the desk clear and keeps all paperwork needing attention in one place. Likewise, *In* provides a place for notes from home, make-up work, or any other papers.

Getting through *In* is best viewed as *one single activity*. We go to the mailbox at our homes and remove *all* of the mail, sort it all, and handle it in one sitting. Likewise, handling *In* is a time for making decisions.

Some items will best be handled by someone else. Attach a sticky note with the appropriate message, and toss the item into *Out*. Place items that will be handled on some future day in the appropriate tickler file.

Place reading material together in a folder or in one section of a briefcase. While waiting for a meeting to start, waiting at a doctor's office, or waiting for a train to pass, having reading material at hand turns wasted time into productive time.

Some items will take time to complete. Make a quick decision on what needs to be done, add the item to the task list, and then place the paper in *Pending*.

Before you leave for the day, *In* must be empty. Your commitment is not to "do" everything, but only to make decisions as to what needs to be done. Making those decisions and putting the paper where it needs to go takes only minutes. Let *In* build up, and you spend hours fighting the fires caused by missed deadlines.

Out: The Place for Departing Papers

Out is the place for items with which we are finished and now need to go elsewhere in the world. Examples include the following items:

1. Outgoing mail.
2. Materials that need to be filed.
3. Papers that need to go to the main office or be placed in teachers' mailboxes.
4. Items to be taken home.

Let the items accumulate and handle the entire stack at one time. If you have an administrative assistant, that person can handle your *Out* a couple of times during the day, emptying it and distributing the contents where they need to go.

My personal preference for *Out* is a large letter tray on the credenza or table near the desk. Its location must be close enough to toss any item into it without getting up from the desk.

At the end of the day, *Out* should be empty. Putting things back where they belong is a hallmark of organization.

Pending: The Papers You Need Today

Some papers cannot be acted on immediately, yet you will need them later in the day. Jennifer's mother is scheduled to see you at 2:00 this afternoon to talk about her daughter's progress. In your tickler file for today are papers you want to reference during that conference. What do you do with them between now and 2:00? *Pending* provides a holding tank for them.

I like to use a desk drawer right above my tickler file for my *Pending*. It keeps the desktop clear. It prevents others from reading material on your desk that does not pertain to them. It also prevents others from inadvertently picking up materials from your desk when they leave.

Arrange the *Pending* items in the order you plan to handle them. When you glance in *Pending*, the item on top is the item that you need to handle next. For some items, the action will be obvious. For others, a sticky note on the document or folder serves as a reminder of the action to be taken. For others, an entry on your task list describes the actions and references the papers needed to complete it.

Let's Tackle the Rest of the Desk

With the tickler file and locations for *In*, *Out*, and *Pending* established, there is no better time than now to organize the rest of the desk. If you can outfit the desk with everything it needs and rid it of everything else, you have a workspace that increases your ability to be productive.

Empty the contents of every desk drawer except your tickler file and *Pending* onto the floor. The lap drawer is a good place for items such as those in Figure 1.3.

The typical desk contains unnecessary duplications. Of the 20 ballpoint pens, only five write. Of the equally large assortments of pencils, most have dull or broken points. Not only do we have paper clips, we have six more

- Pens (black, blue, red)
- Pencils (a few, and well-sharpened)
- Paper clips
- Rubber bands (just a handful)
- Ruler (1 not 6)
- Calculator
- Letter opener
- Stamps
- Scissors (1 pair)
- Memo pad
- Pad of sticky notes
- Note cards

Figure 1.3 Possible Contents of Lap Drawer unopened boxes of them. Return the extras to the supply cabinet. When the junk is gone, the drawer becomes plenty large.

Select a drawer to house the tools you will need: stapler, tape dispenser, possibly a labeler, three-hole punch, and envelopes. The boxes of staples and unused rolls of tape will live with other surplus supplies, and not occupy valuable real estate in the desk drawer.

Now that your desktop is clean and the rest of the desk organized, display whatever decoration adds beauty and makes you smile. Choose a picture or two of your family, mementos that remind you of your most cherished accomplishments, and motivators that fuel your passion for even greater things. You are a professional and the master of your destiny. Your workspace should reflect that image.

Let's Tackle the Rest of the Office (or Classroom)

Gather the rest of the loose paper on tables, filing cabinets, window sills, and every other flat surface. Look for those papers that require action, and drop them in the tickler file. Box all other papers and put those boxes in a closet or some other out-of-the-way place. We will handle them when we organize our reference files.

An "L-Shaped" Desk

Today's professional needs a computer at-hand. The keyboard, screen, printer, and other accessories need a place to sit. The desk, however, is not that place. An "L-shaped" desk provides a place for these items, along with the telephone, and a spot for *Out*. Anyone can fashion such an arrangement by securing a small folding table and placing it at a 90-degree angle to the desk.

Prepare Tomorrow Today

In and *Out* are empty. *Pending* is either empty or you have examined and re-ordered its contents. While you may not have finished every task related

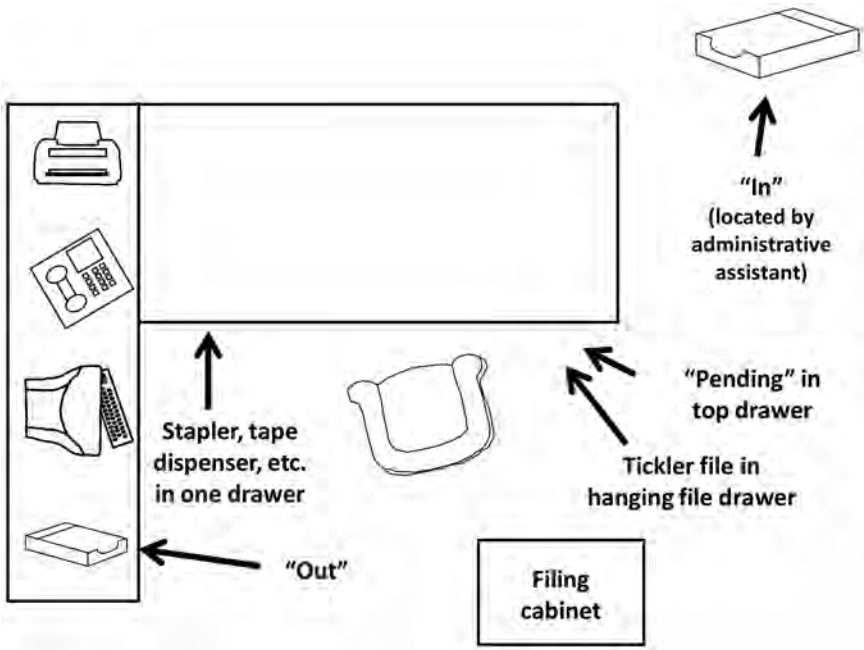

Figure 1.4 Desktop Arrangement

to those papers, you have a sense of what is remaining and the urgency associated with each item.

Before leaving for the day, one more task remains—tomorrow's tickler file. Pull tomorrow's file and empty it on the desk. What items do you see that you could handle quickly? Put a stamp on that birthday card and throw it into *Out*. Put the tickets for tomorrow night's concert in your purse or wallet. Place the lengthy draft of that grant proposal into *Pending* and make an entry on your task list to read and edit it.

What item do you wish to work on *first* upon arrival at school? Leave it squarely in the middle of the desktop—the otherwise *clean* desktop.

My First-Year Secret Weapon

For the first several years of my teaching career, the tickler file and a memo pad in my pocket constituted my entire organizational system. As thoughts of "to dos" occurred, that memo pad trapped them, one idea per sheet. At the end of the day, asking the question, "When do I want to see this slip of paper again?" ensured each one went into the correct file and would resurface on the correct day. Planning the next day consisted of dumping the file for tomorrow on the desk and putting the slips in the order they needed to be handled. I was now looking at my marching orders for the day.

That system was enough to get me started. It was a different age, an age before email, the Internet, or the personal computer. The world was paper-based. You will need something more, and the next chapter provides your second tool—the "signature tool."

Even though I am a digital person, I still carry that little memo pad. Mine holds several credit cards, driver's license, insurance card, a few business cards, and the memo pad. Even though I have digital options for trapping thoughts on the fly, sometimes nothing beats being able to pull out that memo pad. As soon as I write something on that memo pad, I earn the right to forget about it.

We began this book by talking about handling paper, and did so for two reasons:

1. Even though we talk about living in a digital world, we still deal with large volumes of paper and must have strategies for dealing with it.
2. Paper metaphors help us understand digital storage. On our computer, we create "documents," store them in "folders," and organize reference information in "notebooks." Each of those terms is borrowed from our paper-based heritage.

Summary: Your Desk Is Clear and So Is Your Thinking

In this chapter, we asked the question, "When do I want to see this again?" and answered the question by dropping papers in numbered folders. In the next chapter, we will ask the exact same question of all the "to dos" in our lives, and then assign the appropriate dates in the "signature tool."

What if your desktop was clean, except for the pictures of your loved ones and the few pieces of memorabilia that make you feel special, appreciated, or energized? What if you could approach the day with confidence that the papers you need to see today will appear when needed? Would you feel less stressed and more confident? Would you be able to focus on the one thing in front of you instead of worrying about everything else? You are well on your way to making it happen.

2 Your Signature Tool

When you can see all of your choices, you make better choices.

What if you could see the next half-dozen things you need to be doing clearly displayed on the home screen of your phone? What if everything you have to do, with its supporting information, was available to you in one list, in the order you want to do it, and easily searchable? What if that list would make possible an empty email inbox for the first time in recent memory? What if you could add to that list by voice? You can have it—and you can get a good start on it today.

What Is a "Signature Tool"?

Your "signature tool" is the one place to trap appointments, tasks, contacts, pieces of information, and email communication. It turns *forgetting* into a well-deserved right. The signature tool keeps up with the details, allowing your brain to move on to more productive, creative thinking. Before email changed our world, that signature tool would likely have been a paper planner. It was with you always. People saw *you*, and they saw *it*. For many, it was their trademark—their *signature*. What the leader wrote in that book got done.

Moreover, on a day-to-day basis, the busy school leader could see all available choices in one place. That point is the theme of this chapter: *When you can see all of your choices, you make better choices*.

Why You Should Use a *Digital* Tool

The Internet and email changed the way much of our information arrives. When we received three emails a day, we could print them and throw them in the tickler file. When the volume is 103 or more every day, we require something more. In addition to email, our tasks and projects often require reviewing specific websites later. Hand-copying URLs is cumbersome. Saving them as "Favorites," hoping we will remember to look back at them, is unsatisfactory.

This chapter provides the strategy for a "digital signature tool," a five-piece suite that gives us a command over our commitments.

1. Calendar—The places we must be.
2. Task list—The things we must do.
3. Contacts—The people with whom we connect.
4. Notes—The reference information we need to have at hand.
5. Email—The hub of communication.

Let's begin with the universally most underused of the five—the task list.

An Organized Task List

People tend to have at least a decent set of contacts on their mobile devices. Many also keep their calendars digitally. When asked about the task list, however, far too many reply on random bits of paper, sticky notes, or thinking they can just remember it all. Those who claim to keep their tasks digitally are generally either putting them in the calendar or using a rudimentary note-taking app on the mobile phone.

It's time to put an end to operating our lives from sticky notes around the computer monitor. It's time to stop writing a "to do" list off the top of our heads. When you accept a new task, it goes on the list. Each day, a list of pre-defined work waits. You will merely organize it in the order you want to accomplish your tasks.

Because specific pieces of software come and go, this book discusses how to structure a system that has stood the test of time, and one that will work with a wide variety of tools. You may visit my website (FrankBuck.org) for suggestions on specific tools. Whatever tool you choose, I recommend you look for seven elements (see Figure 2.1).

Give Every Task a Due Date

My task list is one continuous list. Every item, whether it needs to be done now or five years from now, is on that list. Two things allow me to see what I need to see when I need to see it: (1) a due date on every task; and (2) the ability to search the list.

Calling Billy's mother is something to do *now*. For the promise made to follow-up with her a month from now, you need some way to enter that promise into your system, have it disappear, and then have it reappear on the appropriate day. The ability to assign a due date is the key to making it happen.

Does this idea remind you of the tickler file? In Chapter 1, we picked up a piece of paper and asked the question, "When do I want to see this paper again?" With all of our tasks, we will ask exactly the same question, and assign a due date accordingly.

The "due date" is the date on which you want to see the item again. It is a self-imposed deadline. If the task has a firm deadline, assign a due date with ample lead time. So that you not lose sight of the hard deadline, include it beside the task, and do so in all capital letters. Figure 2.2 shows an example.

1. "Due date" field and the ability to sort by due date.
2. Repeating tasks.
3. Note section for each task for additional information.
4. Quick search of the subject line.
5. Communication with email.
6. Synchronization across all devices.
7. Voice input.

Figure 2.1 The Seven Criteria for Choosing a Digital Task List

Sort by Due Date

Most software allows the user to sort tasks in a variety of ways. My recommendation for the simplest way to construct a list in the order you want to accomplish the tasks is to *sort by due date*. If you wish to have a secondary sort, let that one be on *priority*.

Items intended for yesterday or the day before will be at the top, the logical place for them. Items planned for the future appear far down the list. Within any particular date, the higher-priority items will sort higher on the list.

What if you look 20 items down the page and see a task you want to move to the very top? Because your tasks are in order by due date, *you can manually move any item higher or lower on the list by changing the due date*. You will approach the day with a list in the order in which you want to accomplish your tasks.

Adding a start-date field may be helpful. It would allow you to filter out items that cannot or should not be done until the future. However, by placing your items in the order they should be done makes inclusion of a start date optional.

Digital task lists often provide the ability to assign a location, a context, an estimated time to complete a task, and a host of other fields. The more you have to enter, the longer that entry requires. Today's mobile devices allow for voice input of tasks with the current date assigned as the default due date. *Keep entry simple*.

	Task	Due Date	Note
☐	Write recommendation for Cameron	Dec 1	☐
☐	Call Jim re: Desks	Dec 1	☐
☐	Finish application for NAESP DEADLINE DEC. 19	Dec 3	☐
☐	ETR Amazon order	Dec 3	☐
☐	Call Tony Harris 555-6789	Dec 4	☐
☐	ETR Call Vernon re: Tutoring program	Dec 4	☐
☐	Blog-post info on ABC scholarship	Dec 4	☐

Figure 2.2 Sample of an Organized Task List

Identify Repeating Tasks

How many tasks do you have in your professional or personal life that must be completed about the same time every year, every month, or every week? Education is probably the most cyclic business in the world. Chapter 3 elaborates on this characteristic and shows how you can leverage your task list to make handling repeating tasks easy.

Use the "Note" Section for Additional Information

As you plan for a meeting with the superintendent, various items come to mind to discuss. Where can you record these items? You wish to maintain a list of books to read in the future. Where can you house these titles? The curriculum improvement project you are planning requires multiple tasks. You also have other information about that project as well as a file folder of information and digital documents related to the project. Where can you collect it all?

A good digital task list provides a note section in each task. Information you need in order to complete that task goes in the note section. I have a task on my list called "Books to Read." In the note section is a list of books together with the URL for the countywide library system as well as my membership number. The URL is a clickable link, and I copy and paste the membership number into the login screen (see Figure 2.3).

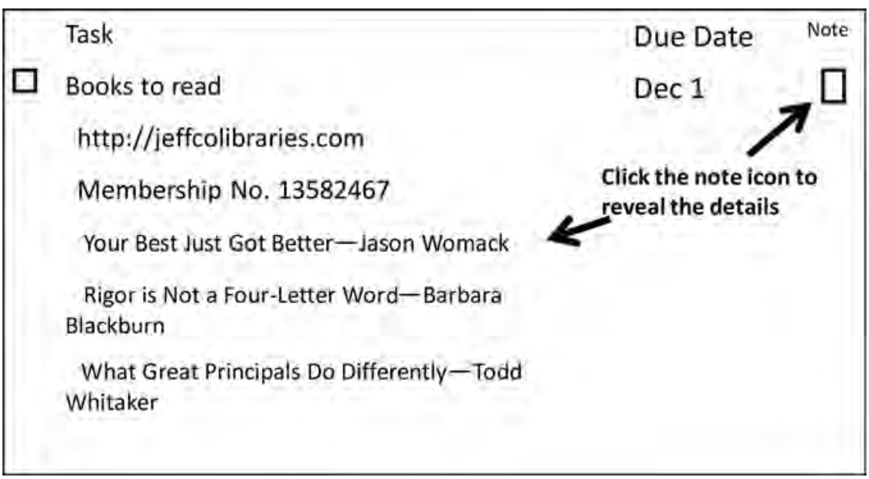

Figure 2.3 Sample Content of Task Note

"Search" Makes a Digital List Different

Perhaps the biggest argument for a digital task list is its ability to search. Think of a close colleague with whom you work and frequently collaborate. In Figure 2.2, you saw some sample tasks. Three of the tasks on the list relate to Bob, a colleague at the central office. If we were to scroll further down the list, we may find a dozen more items related to this frequent contact.

When Bob comes walking in the door unexpectedly, wouldn't it be good to be able to see all of the items pertaining to him? Every good digital tool will have a search function. Searching the list for "Bob" shrinks the list to only the items related to him, and those tasks are ordered by due date.

You arrive for an appointment only to find the person with whom you are meeting is going to be 30 minutes late. Wanting to be productive, but armed with nothing but your phone, you could make phone calls—if only you knew what they were.

When you add a phone call to your list, include the word *Call* in the task (Call Jim, Call Mary, Call Bob, etc.). Later, searching for *Call* returns a list of every phone call you need to make, in order by due date.

Delegation and the Task List

From time to time, we assign a task to someone and want to be sure the other person comes through. We loan a book and want to be sure the book is returned. We order materials from a business and expect to receive those items and be billed correctly. We ask someone to send us a report and are expecting to receive it. Each of these scenarios is an example of *delegation*. The task belongs to someone else, yet we have a vested interest in the other person completing that task. How can we keep track of all of the tasks that belong to someone else?

The digital task list provides the answer. As soon as you loan the book, place the order, or make the request for the report, add a task to your digital task list. Figure 2.4 shows several items that have been delegated. The other person is responsible for the action, and we are expecting to receive the results.

Notice the letters "ETR" at the beginning of each item in Figure 2.4. Those letters serve as an abbreviation I have been using for years—*Expect*

	Task	Due Date	Note
☐	ETR Cooper—Minutes from grade-level meeting	Jan 10	☐
☐	ETR Smith—Update on Billy Jones	Jan 10	☐
☐	ETR Acme order #18762	Jan 15	☐
☐	ETR Amazon order	Jan 15	☐
☐	ETR Call Mitch Norris	Jan 16	☐
☐	ETR Call Vernon re: Tutoring program	Jan 20	☐
☐	ETR Adams—Borrowed Excellence in Teaching	Feb 15	☐

Figure 2.4 List of Delegated Tasks

to receive. Adding that abbreviation reminds me I am waiting on something from someone else. I assign a due date that answers the question, "When do I want to see this item again?" Finally, I add in the note section information about the task. For books borrowed, I would list the title of the books and the date they were borrowed. For the order placed, I would list the items, confirmation number, date ordered, and the name of any salesperson.

When the due date arrives, the task on the list serves as a reminder to follow-up with the other party. However, what if you want to see a complete list of everything you are waiting on from anyone? Remember how we searched for the word *Call*, and our list returned a list of every phone call, in order by due date? Remember how we searched for "Bob" and the search returned every item related to him, in order by due date?

In this case, search for *ETR* and watch the results. Everything you are waiting on from everybody is now in one list, and the list is in order by due date.

The Marriage Between Email and Task List

How many emails sit in your inbox because they are reminders of things you have to do and the related information for doing them? A good digital task list provides you with a unique email address. Any email sent to, or forwarded to, that address goes on the task list. Chapter 4 expands on this concept.

Access Your Task List From Anywhere

The task list available only on the computer is useless the moment you walk away from that computer. Any good digital list provides a web application, accessible from the computer and apps for mobile devices.

Voice Input Makes Entry Easy

Every mobile device has some type of voice-activated assistant. If possible, choose an app that allows you to speak into the device's digital assistant and have it create a new task. Chapter 4 expands on this concept.

A Task List That Gets Done

The "Fab Five"

Plan your day the night before. Some items on your list for today will not have been done. Some items will have lost their importance. Your job is to look at the list and put it in the order in which you want to work through the list the following day.

Scroll to the list of tasks that are planned for tomorrow. Begin looking at those items and slowly scroll to the top of the list. Ask yourself, "If I could only accomplish five of these tasks tomorrow, what five would I choose?" Those are your *Fab Five*, those few tasks which either because of their urgency or their importance to achievement of your goals will pay the biggest dividends.

As you identify the *Fab Five*, change the due date of those items so that they sort to the top of the list. We are using due dates as a vehicle for putting the list in order, nothing more. Throughout the day, those five items are front-and-center. Get them done early in the day, and enjoy the freedom that comes with being able to make choices in the moment according to the opportunities that present themselves rather than the deadlines that breathe down your neck.

Batch Similar Items by Using Due Dates

If you want to handle a large number of tasks in the shortest possible time, learn to *batch* them. If you are a principal and need to have short interactions with 10 different teachers, handle them all in one batch by walking down the hall before the start of the school day. Move from one room to the next as you have these short interactions.

Are interruptions damaging your productivity? On the other hand, are *you* the culprit, interrupting colleagues with a single question, only to repeat the interruption five minutes later? Rather than interrupt with a question, enter that question on your list. When you have a sufficient number of questions, handle the entire batch. Should your colleague phone you or visit in person with his or her own concerns, search the list for that person's name on your digital task list and handle your agenda as well.

Rather than drive across town for one errand, enter it on your list. When you have enough of them to make the trip worthwhile, run all of the errands in one trip.

How do you handle batching items on your task list? Use *due dates* and, if necessary, *priority* for a secondary sort. After scanning your list to determine the *Fab Five* and assigning due dates that force them to the top of your list, turn your attention to looking for items that can be accomplished in one batch. Examples include the following types of tasks:

- Tasks to handle at the central office before and after your meeting.
- Tasks you want to handle as soon as school is dismissed.
- A set of errands.
- Tasks planned for the evening.

Make the Next Step "Crystal Clear"

As humans, we do what is easy. When someone looks at a list and sees two items—a difficult one and an easy one—human nature dictates choosing the easy one. "Buy shoestrings" will win out over "Solve world hunger" every time because we know exactly how to go about buying shoestrings. Solving world hunger, like so many other goals we may have, is large and undefined. We really do not know where to begin.

Figure 2.5 provides an example of a list of ambiguously worded items, most of which would require multiple steps to complete. The list in Figure 2.6 takes a different approach. These items are "crystal clear."

	Task	Due Date	Note
☐	Supplies?	Jun 1	☐
☐	Improve math curriculum	Jun 2	☐
☐	Grant proposal	Jun 4	☐
☐	Maintain computer	Jun 5	☐
☐	Orders??	Jun 5	☐
☐	Get summer school going	Jun 5	☐
☐	PTA stuff	Jun 7	☐

Figure 2.5 Unclear Task List

	Task	Due Date	Note
☐	Mills—Ask if he wants to teach summer school	Jun 1	☐
☐	Report air conditioning problem in gym	Jun 2	☐
☐	Call Acme-555-8312 to check on order	Jun 4	☐
☐	Register for math workshop 555-7646	Jun 5	☐
☐	Outline ABC report	Jun 5	☐
☐	Call Carter to schedule interviews	Jun 5	☐
☐	Compose blog post re: PTA meeting	Jun 7	☐

Figure 2.6 Crystal Clear Task List

What makes the tasks in Figure 2.6 "crystal clear"? They possess the following characteristics:

1. Crystal-clear tasks include verbs. Verbs are the *doing* part of speech. Read a crystal-clear task and you know exactly what it is you are supposed to do. Clarifying what is to be done on the front end increases the chances that you will know what to do when you see that task on the list later in the week.

2. Crystal-clear tasks can be accomplished in one sitting, and ideally can be accomplished in a few minutes. Overly burdensome tasks tend to sit idle on lists while those that are easy to do get done. The trick is to break big jobs into tasks that are small enough that they are accomplished in a short period of time.
3. Crystal-clear tasks have all needed information at hand. If the task is a phone call, the crystal-clear task has the phone number already written down. The agenda for the phone call is already written out.
4. Crystal-clear tasks can be done *now*, without something else having to happen first. If something else must happen first, *that* is the task which should appear on the list

Work Ahead of Deadlines

Batching similar tasks allows us to accomplish them faster than any other approach. The enemy of this approach appears when we are working too close to deadlines. When deadlines loom, our days are driven by whatever project is about to crash. Those who have experienced waiting too long to complete an application or request a purchase order have experienced what happens when the day is deadline-driven.

We wind up spending the better part of a day "walking" paperwork through its various steps, interrupting other people to ask them to act on the emergency, and experiencing a great deal of unneeded stress. On the other hand, the exact same paperwork initiated a week ago would have required virtually no amount of time. The paperwork would wind its way through the pipeline with no additional expense of time, energy, or stress.

The focus of *today* must never be to simply complete what must be done *today*. The organized leader stays ahead of the curve. If a project begins to bog down, enough time has been built in to compensate. Orders are placed with vendors so that they arrive in plenty of time. Tasks are delegated to others far enough in advance that the people to whom we delegate need not immediately drop their other initiatives to work on the new assignment.

In you are drowning in responsibilities right now, your best use of time is going to be to take a step back, put your system together, and decide what you can defer to a later date, delegate, or dump.

What if a Task Has No Due Date?

Many tasks have no particular due date. You simply need to do them at some point. Group these items together by assigning them a due date of the last day of the month.

Various authors have addressed this concept. *The Organized Executive* (Winston, 1983) used the term "Master List." *Time Power* (Hobbs, 1987) called it the "Grass Catcher List." *Getting Things Done* (Allen, 2005) called it the "Someday/Maybe List." Regardless of the terminology, our system needs a parking place for tasks that have little urgency and no specific date assigned to them.

At any time, you know you can scroll to the last day of the month and find a large number of low-priority tasks. Complete a few on the spot. Plan some over the coming days by changing the due dates.

Regular review is important to keep these tasks from falling through the cracks. Because they have a due date of the last day of the month, on that day, you would automatically be presented with them. Some you will schedule for specific days the following month. Others, you will roll over to the final day of the next month. Still others, you will delete altogether. If your digital task list allows you to mass-assign due dates, rolling a large number of items to the last day of the following month will be easy.

Likewise, you will have some tasks that you want to complete by the end of the week. I typically assign the coming Friday's date. Likewise, I assign Friday's date to the *expect to receive* items that simply need to be resolved within the next few days.

In my life, Saturday is a good day to run errands. When I add an errand and there is no particular date associated with it, I assign Saturday's date. On Saturday, all of those errands appear together. If I find myself running errands at some other time, I know I can scroll to Saturday and find them there.

When Will I Get It All Done?

If you are like most people, you look at your task list and ask, "When will I get it all done?" After all, when you truly corral all of your tasks and future goals from the random scraps of paper, variety of notebooks, and thoughts rolling about your head and put them in one place, the list is long. At what point will you get up one morning and see that there is nothing on the list?

More importantly, if that list was blank, would that be a good thing? Would it represent freedom? On the other hand, would it represent a life void of purpose and excitement?

A restaurant presents customers with a lengthy menu. A large menu selection is a good thing. Are you going to order everything on the menu? Of course not. Visit that restaurant a dozen times, order something different each time, and you still will not have sampled every choice on the menu.

Ordering *everything* is not what a menu is for. It is not something to be "finished." It presents choices, enjoyable choices. The longer the menu, the more items are *not* chosen. However, the longer the menu, the greater the chance that what is chosen will be *delicious*.

Using a different analogy, walk into a library. You will not read everything from the vast array of books that occupy that building. But that is not what a library is for. It presents you with wonderful choices. The organized way in which books are shelved and the comprehensive card catalog provide a total picture of the choices.

We can view our task list as something that must be finished, or we can view it as something to be enjoyed. I propose that the attitude we take toward the length of our list may well shape the quality of what we put on it, and in turn, the quality of our lives.

If my aim is to finish the list, then my temptation is to add only those items that can be finished quickly. I will limit my goals. I will resist adding items to the list, looking at each additional item as an enemy standing between me and a list that is "done."

You and I can take another view of the list. We can view it as a place to trap all of the worthwhile opportunities that we can't take advantage of at this very moment. It is the menu that lists 50 different varieties of cheesecake. Eat one today, but keep a list of the other 49 for the next time a hunger for cheesecake presents itself. It is the library that houses all of the classics. You can only read them one at a time, but be glad the shelves house many more, because you will be back.

I realize I will never "get it all done" and neither will you. With all of the opportunities that are available to us in this great age in which we live, to be able to "get it all done" means ignoring the mere existence of a wide array of wonderful choices. What a sad existence that would be.

The length of that task list may well be a testimony to the wide variety of interests we have, our thirst for knowledge, and the overall outlook that tomorrow will be better than today. As long as there is a healthy list of opportunities, there is a reason to get up in the morning, a reason to "seize the day," and an attitude that when the night comes, we can say that we did something to make today count.

No, we will never "get it all done." For the visionary school leader, that's a good thing.

The Calendar

My experience has been that when people say they are keeping their task list digitally, they are adding tasks to their calendars. The reason? They lack any other place to put them. If you have read this far, you have a better place.

The calendar should display exactly three types of items:

1. Appointments—First and foremost, the calendar tells me where I am to be and when.
2. Tasks that absolutely must be done that day—The grant proposal has a postmark deadline of today, and the proposal is yet to be completed. Block out time on the calendar just as if it was an appointment. These instances, however, will be rare if you are working ahead of deadlines. Teachers may need audible reminders during their class time regarding *immediate deadlines*. When a special event disrupts the normal bell schedule or a student needs a reminder to visit the nurse at a particular time, an audible calendar alarm prevents forgetting.
3. Information about the day—Mrs. Jones is having a guest speaker in her class. I may go; I may not, all depending on how the day goes. However, I want to be aware the guest speaker is one of my choices.

Why not put tasks on the calendar? If we mix what is critical with what is optional, we can no longer see what is critical. When an opportunity arises, you must be able to take one look at your calendar and say "yea" or "nay." We cannot do that if the three critical items are mixed in with the 57 that are not.

If someone else schedules appointments for you or needs to have access to your calendar, explore your ability to share your calendar, including how to grant "view and edit" versus "view only" privileges. The ability to enter repeating events, information about each event in the "notes" section, and a location for which the mobile device's GPS will provide turn-by-turn directions, gives a digital calendar a distinct advantage over its paper counterpart.

A Very Complete Contacts List

Contacts is the substitute for the paper address book of days gone by. It is also the part of the productivity suite that people tend to use the most efficiently. Names, addresses, phone numbers, and email addresses synced across all devices is the standard. Many people, however, overlook one critical area—the "note" section.

Look for the large, open box that is a part of each contact record. Often, this box does not show by default on mobile devices. Look for a link that says something such as "Add additional field."

Use this field as a place to put significant information about the person:

1. You meet people at a conference and they give you their business cards. Enter the information in your contacts. In the note field, add a notation as to the event at which you met them. The notation will serve to jog your memory later.
2. We routinely buy presents for relatives, often clothing. Just what shirt size does Uncle Bill wear? Put clothing sizes in the note for your contacts, and you will have it on your mobile device as you shop.
3. Your friend in a distant state, to whom you talk with about once a year, has two children. You can never recall their names. Put the names of those children in the note field of your friend's contact record. Also add their birthdates if possible. During your next conversation, your friends will be amazed at how your memory has improved. You are able to ask about the children by name and miraculously know that little Buffy is around eight years old.
4. One of your contacts is working on a large and important project or is planning for a special trip with his family. When you talk to this person, you would like a reminder about these milestones in his life. Add the information to the note field in his contact record.
5. Every time you call a particular business, the receptionist asks you for your account number. Put that information in the note field, and you will have it.

A Wealth of Reference Material

We all need a place to store reference information and need to be able to access that information from anywhere. The fourth part of the "signature tool" is software to hold reference information. That discussion merits its own chapter, and even its own recommendation for a particular piece of software. Refer to Chapter 8 to learn about *Evernote*.

Our Love/Hate Relationship With Email

Email serves as the hub of our communication system. We receive messages from others, automated confirmation on our purchases, newsletters, advertisements, and a host of other information.

Email makes communication easy, and that's the good news. Because it's easy to send, we get plenty of it, and most people lack a strategy for staying on top of it. In Chapter 4, you will learn how to get email empty every day.

Summary: You Only Have One Place to Look

What if the all of the information about the places you need to be, the things you need to do, the people in your life, the information you need to access, and the communication you receive was accessible anytime and from anywhere? What if you never had to rewrite a task list? What if you could see all of your choices? The result just might be that you would make better choices about how you spend your time.

3 Handling Repeating Tasks

Think it through once.

Education may well be the most cyclic business in the world. Each year, we open school, close school, and have large projects that repeat about the same time in the cycle. Each project carries with it numerous tasks. What if you didn't have to rethink those tasks every year? What if you could throw them all into a system that would present each one at the right time?

The old saying "the devil is in the details" is certainly true in education. Let one of the myriad of details slip through the cracks and you are faced with a group of students ready for the field trip—and no bus. Not only that, but there are no sack lunches prepared for the students because you forgot to speak to the lunchroom manager about preparing them. The check you will need to present at your destination almost didn't get written because you forgot to request it until yesterday afternoon.

The good news for those of us in the business of education is that many of the same "devils" return every year and at the same time. The first time a big project such as starting a school year or planning the trip to Washington is undertaken, little "to dos" will occur to you at the most unlikely of moments—in the middle of a meeting, during lunch, or while pushing the shopping cart down the aisle of the grocery store. When they occur, the habit of trapping them with the signature tool will keep a good idea or essential detail from disappearing.

The news gets even better. Once the project has been handled once, you should never have to rethink *any* of those details. Never again will you sit with a blank legal pad three weeks before the start of school trying to pull a list out of your head of what you need to be doing. Never again will you rethink all of the details that went into the big "spring production." The truth of the matter is all of the details you need to handle *this* year are the same ones handled *last* year if you only had a system to keep track of them.

This chapter provides a system for identifying and trapping all of the repeating tasks that come your way. Without such a plan, you are in for a frustrating experience as you "reinvent the wheel" year after year.

Setting Up a Repeating Task System

School leaders need to get very good at recognizing repeating tasks as they present themselves. Consider these two items:

1. Call Mrs. Smith.
2. Order blank certificates for Awards Day.

Completing each task requires no more than a short phone call. However, the two are vastly different. Complete the call to Mrs. Smith and you check it off as "done." Those certificates present a different challenge. Once the phone call is over, you are done—for now. But what about next year? What is going to be your trigger to remind you to make that two-minute phone call a year down the road? And what price will you pay if you forget? Forget that one phone call, let that one detail slip through the cracks, and the sponsor of this event will be looking at quite a problem when there are no certificates on hand to present at the ceremony.

Getting very good at recognizing repeating tasks when they first present themselves is crucial in keeping things from falling through the cracks. When you find yourself logging a task that will repeat at regular intervals, take the additional few seconds to insure that next year, next month, or next week, your system will remind you.

What follows is a starter list of repeating tasks. These tasks are written from the standpoint of a principal. Many would be applicable to a teacher, counselor, central office administrator, or many other leadership positions.

Sample Repeating Tasks for Summer

- Revise faculty handbook.
- Revise student handbook.
- Analyze discipline statistics from previous year.
- Examine standardized test data.
- Draft plan for test-score improvement.
- Purge filing cabinet.
- Compose duty roster for coming year.
- Update custodial schedule.
- Compose master schedule.
- Assign students to classes.
- Prepare list of textbook fill-ins.
- Prepare annual budget.
- Order honor roll ribbons for coming year.
- Prepare list of needed office supplies.
- Order nameplates for all new teachers.
- Select mentors for new teachers.
- Organize evaluation forms for coming year.
- Schedule PTA officer meetings.
- Arrange for fire extinguishers to be checked and serviced.
- Schedule dates of assembly programs for coming year.
- Schedule dates for school pictures (fall, spring, Santa).
- Schedule severe weather drills, fire drills, and intruder drills.
- Schedule new teacher orientation.
- Schedule PTA meeting dates.
- Submit field trip requests for annual trips.
- Plan birthday gift idea for teachers.
- Plan staff development program for coming year.
- Compose press release regarding registration.
- Compose press release on new teachers.

- Compose communication to parents regarding registration.
- Compose monetary requests from PTA.
- Prepare "welcome back" letter to faculty.
- Prepare "welcome back students" post on blog.
- Plan meeting with custodial staff regarding new assignments.
- Plan meeting with lunchroom manager.
- Plan meeting with counselors.
- Schedule parent volunteers to help with opening day.
- Test all bell schedules.

Sample Repeating Tasks for September

- Gather grading and discipline procedures for all teachers.
- Plan PTA Open House.
- Review progress reports to identify students already having difficulty.
- Draft talk for civic organizations regarding plans for the year.

Sample Repeating Tasks Just Before the Winter Break

- Compose winter break work schedule for custodial staff.
- Prepare Christmas or other holiday cards for faculty.
- Prepare Christmas or other holiday cards for key city leaders.
- Write thank-you notes for gifts received from staff and students.
- Be sure heat has been set correctly for long break.

Sample Repeating Tasks Each Spring

- Review with counselor plans for high-stakes test administration.
- Oversee intervention plan for students in danger of retention.
- Schedule end-of-year evaluations.
- Order certificates for Awards Day.
- Write Awards Day speech.
- Prepare presentation for local civic clubs on year's accomplishments.

- Secure recommendations for students needing to attend summer school.
- Select teachers for summer school.
- Compose annual discipline statistics report.
- Schedule end-of-year evaluation conferences.
- Prepare recommendations for teacher contract renewals and non-renewals.
- Prepare press release on scholarship recipients.
- Write press release on retiring teachers.

Sample Repeating Tasks Each Month

- Review school goals and plan tasks for their accomplishment.
- Examine financial statement.
- Compose newsletter.
- Write article for newspaper.
- Run progress monitoring report.
- Order supplies for school store.
- Examine playground equipment for needed repairs.
- Compose honor roll statistics.
- Print student birthday list for the coming month.
- Scan hard drive for errors.
- Plan meeting with PTA president.
- Prepare remarks for PTA meeting.
- Update forms for this month from monthly tickler on computer.

Sample Repeating Tasks Each Week

- Examine reports from computer-assisted learning programs.
- Plan classroom observations.
- Examine attendance report.
- Compose blog post to faculty and staff.
- Compose blog post to parents.
- Send press release to newspaper re: school activities.
- List thank-you notes to write.

Your repeating tasks extend beyond your professional responsibilities. In addition to being a school leader, you could also be a homeowner, spouse, parent, church leader, or community leader. Examine each of those roles, and the list of tasks that repeat will almost begin to write itself. Providing you with a comprehensive list would not work; everyone's situation is different. The important thing is that you get really good at recognizing repeating tasks when they first arrive and that you put them into your system.

Handling Repeating Tasks: Low Tech

Index cards, used in conjunction with the tickler file, offer a low-tech method for insuring repeating tasks are completed according to schedule without having to give them another thought. Each time you identify a repeating task, take an index card and write the task in the middle of the card. Toward the bottom of the card, write instructions on how the card should be re-filed once the task has been completed.

As a beginning principal, the thought may occur to you during the summer to review the schedule for the custodians. You would be inclined to jot that task on your list and check it off after completion. The problem with this approach is there is no trigger to remind you about this task a year hence. Instead, you must realize that updating this schedule is something that will occur not one time, but instead returns ever summer. Using the index card system, you would pull a blank card and notate on it something like what you see in Figure 3.1.

Once the instructions have been written on the card, you will never again have to "remember" to update the custodial schedule. Once the principal

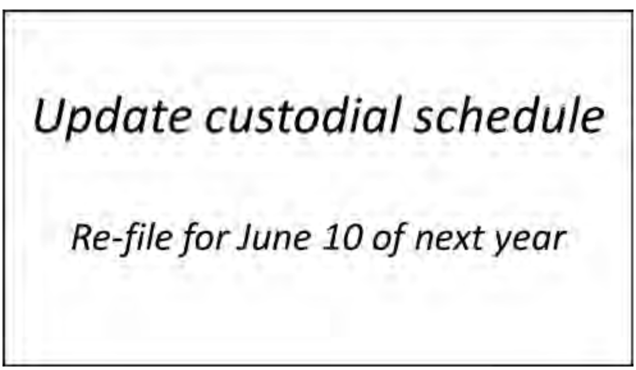

Figure 3.1 Using Index Cards for Repeating Tasks

updates the schedule, he or she simply drops the card in the tickler file for June and forgets about it. Next June, the card reappears. Perform the task again and re-file the card.

Handling Repeating Tasks: High Tech

A system using index cards and the tickler file would work. A digital task list works much better. Be sure the software includes a repeating task feature and that you can quickly search the list for a task. The last thing you want is having the same task entered five times because you can't remember whether or not you already added it.

Many repeating tasks, especially those you only perform once per year, will have additional information necessary to have at hand. If you only prepare a particular report once a year, you may forget the steps followed the previous year. Record that information in the note section of that task, and it becomes instantly available exactly when needed. Figure 3.2 provides an example.

Keeping Your Sanity With Repeating Tasks

Visit any school leader, and you are likely to see a shelf of manuals, each filled with tasks to be performed. That shelf may include all of these manuals and more:

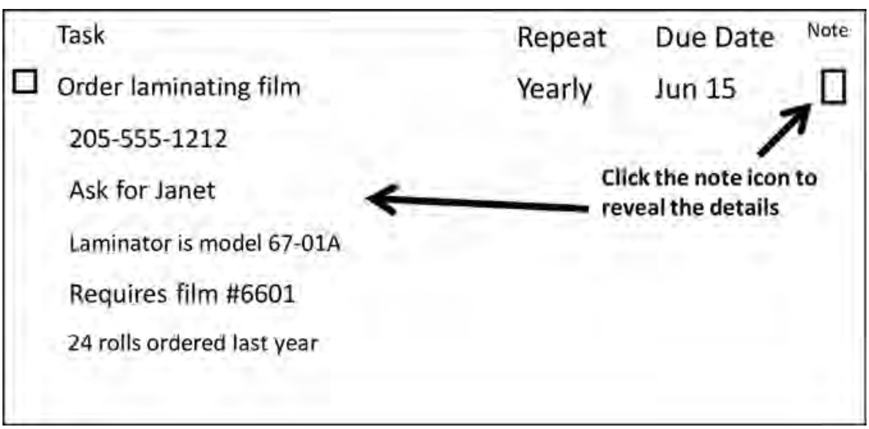

Figure 3.2 Repeating Task With Attached Note

- Teacher Evaluation Manual—This manual, six-inches thick, is laden with timelines and procedural landmines.
- Crisis Plan—Nobody doubts the importance of keeping students safe. A thick manual, however, is not easily accessible and practical in a real crisis and does not necessarily ensure a safe school.
- State Law—One volume of the State Code covers the laws governing education. Many procedures must be carried out annually due to requirements found in that book.
- Board of Education Policy—This thick manual is laden with tasks that must be performed at various points in the year. Read the manual with an eye for exactly what you are to do.
- Course of Study—With all of the manuals on the shelf, let us not forget the reason schools exist is to teach students. The Course of Study for each discipline outlines content, requirements for graduation, and time requirements.

Each of the thick manuals is written in isolation. No one ties them together for the principal. No one combs through the collection and then hands the principal a comprehensive list of what needs to be done during the month of August to satisfy the requirements of all of the various sources. No one puts it all together in one big "ball of wax." That job is for the *principal*. A similar scenario exists for the superintendent, curriculum director, assistant principal, department head, or anyone else who has assumed a leadership role in the school system.

The good news is there is a way to preserve some sanity, and the Repeating Task System is it. While reading through any one of those manuals, tasks that must be performed routinely will leap off the page. Put them in the system. Jot them on index cards, or better yet, enter them in the digital task list as repeating tasks.

Enter a task in your system, and you earn the right to forget about the task. The system will bring each one to your attention at the right time. Your Repeating Task System is the glue, the "whole ball of wax" that puts all of the tasks in one place and makes them "get in line."

Who Can Help? The Art of Delegation

Leaders accomplish great things through other people. Any book on organization and time management will address the subject of delegation. We talk about the concept at this point because you now have all of your tasks in one system. In particular, you have trapped, in one place, all of those tasks you will perform on a repeating basis.

We began Chapter 2 with the statement, "When you can see all of your choices, you make better choices." When you can see all of your repeating tasks, you gain an appreciation of the sheer number, and can make intelligent decisions about which ones you keep, which you train someone else to do, and which have become obsolete and need not be done at all.

The busy leader says, "It's just easier to do it myself." The effective leader realizes the 20 minutes spent teaching someone how to run a set of weekly reports saves almost that much time each and every week from there on out.

Delegation in an Elementary School Setting

Elementary school teachers are masters of delegation. One student is in charge of changing the calendar date. Someone else passes out papers. A third student is in charge of feeding the classroom hamster. The list goes on and on.

Elementary school teachers understand something so many of us miss. None of us can do everything. Others can do some of those things as well as we can. Sharing the load not only frees us to do those tasks that only we can do, it gives others a stake in the program.

As a first step, think through the tasks you are performing that a student could do as well, *or better*, than you. Pattie Thomas, who taught 1st grade at Raymond L. Young Elementary School (Talladega, AL), developed an effective system. To give students ownership in running the classroom, every child had an "Adopted Area" of the room. At the end of the day, every child handled his or her "Adopted Area" at the same time. Mrs. Thomas noted that the secret of the program's success was a three-minute timer. When she set the timer, all of the children went to work simultaneously. At the end of three minutes, the board was clean and ready for the next day, complete with tomorrow's date written in the corner. Plants were watered. Pencils were sharpened. Tables were wiped. The floor was swept. Books were straightened. Materials were arranged for the next day. All the while, Mrs. Thomas stood back and watched as the children took care of their "Adopted Areas" (Buck, 2010).

A bulletin board in the room sported a set of library pockets, each pocket labeled with the name and possibly the picture of a specific job. Each child's name was written on a Popsicle stick. *Every single student had a job*. Job assignments were made by simply putting the Popsicle sticks in the pockets. For bigger jobs, two are three students could be assigned to work together.

Rotating jobs was another important part of the program. Mrs. Thomas rotated her jobs every month, giving students a long enough period to learn the job and perform it well without becoming bored.

Delegation in a Secondary School Setting

For the secondary teacher, the same approach will work. Those who teach in this arena can ask themselves questions about the "housekeeping" duties present in the classroom. Examine them in terms of first period duties, last period duties, and duties that would be performed every period.

The first period, or homeroom, generally includes some type of procedure for taking attendance for the day and gaining an accurate lunch count. Traditions such as reciting the Pledge of Allegiance or observing "a moment of silence" take place during this time. Distribution of memos or flyers intended for the entire student body often happen at this time. Likewise, material that the entire student body is expected to return is often collected at this point in the day.

Homeroom, or first period, is also a time when certain materials are set up for the day's use. The projector must be turned on. The laptop to which that projector is connected must be booted. Activities that students will begin when they arrive in class at the beginning of each period must be written or projected on the board. As a teacher, list the specific "housekeeping" duties you find yourself performing. This list is the foundation of your own "Adopted Area" system.

Likewise, the last period of the day is a unique time. It is the time when the day winds down, when things are put away, and when some preparation for the next day can happen. Again, think through the "housekeeping" tasks that are keeping you at school longer than necessary. Organize a system whereby you enlist the help of multiple students.

Finally, those tasks exist that occur every period. Papers must be collected. Papers must be distributed. The door must be closed when the tardy bell rings. Provisions must be made to save materials for students who are absent. The list goes on and will differ from teacher to teacher.

Make your own list. Then, make your plan for how you will delegate these tasks to students, how you will rotate the jobs, and how you will quickly and effectively teach the students how to perform the duties well. Yes, teaching has the potential to be a very stressful job. The organized teacher realizes that thriving in this field includes being good to yourself. Allowing students to help share the load is not a sign of laziness. Nothing could be farther from the truth.

Benefits to the Students

When we delegate responsibilities to students, we accomplish several goals:

- We reduce the time that we, as leaders, spend on non-teaching functions and give ourselves more time for that which is related to the craft of teaching.
- We give students a sense of ownership in the classroom.
- We teach responsibility. The classroom only functions efficiently when everyone does his or her job.

Look for the repeating tasks. The routine items that must be done daily, weekly, or monthly serve as prime candidates for delegation. As others assume some of these tasks, your time becomes free for those things only you can do.

The principal can use a similar approach. Identify tasks that have been stealing precious minutes every single day and turn them into tasks that a student can execute with pride. Teaching can be a stressful job. Administration can be stressful. Those of us who are in this profession for the long haul find ways to reduce the stress.

Saying "No"

Educators are helpful people. We are programmed to say "Yes" to any request for our time. We hate to say "No," to possibly disappoint someone, and to seem unhelpful. The paradox is that when we say "Yes" to one thing, we are automatically saying "No" to something else. That "something else" just might be more valuable to you and your organization. When you are able to see all of your commitments, you are better able to assess what to keep, what to delegate, and what to decline.

We teach other people how to treat us. When working on an important project and someone drops in, what do you do? If you drop the project and let this person have as much of your time as desired, get ready for a repeat performance. Do you respond to every email as soon as it rolls in? If so, others will come to expect it and be upset in the event they do not receive a response instantly. Basically, you will teach those around you how to treat you by what you allow. Furthermore, you teach others how you value your own time by how well or poorly you manage it.

When someone else waits until the eleventh hour and then drops a task in your lap, how do you handle the situation? Bail the other person out, and the lesson you teach is that others can wait until the last minute and you will still make sure everything turns out just fine. Prepare for more of the same.

Do you find yourself unable to tackle valuable tasks because you are answering insignificant questions posed in random emails? If you continue to work through your organized task list and handle these interrupters last rather than first, interesting things begin to happen. People will try and find answers on their own before turning their research projects over to you. When they see that you have a plan for your time, they will find someone else to handle the trivial tasks.

Another side to this scenario exists. As you assume projects of significance and produce results, a clear message is sent that you are the person for this type of assignment. How do you wish to spend your time—on the trivial or on the significant? Ultimately, that choice is yours.

Chapter 2 showed you how to assemble one list of all of your commitments. You have now learned how to use that list to identify repeating tasks and enter them only once. Now, you can see all of your choices. When you can see all of your choices, you make better choices.

Expanding the Repeating Task List Throughout the Organization

Maintaining a system for your own repeating tasks is key to personal productivity. What if you could share this concept with other people? What if the entire organization mastered the art of putting repeating tasks on autopilot? The lost motion is reduced. Things stop falling through the cracks. People start finding time for creative thought.

Trapping those repeating tasks in a system has another benefit. I recall an elementary teacher who handled many roles within our school. When asked about how she kept up with it all, she would simply say, “I have it all in my head.” The day came when she retired. On that day, she took her head with her.

You can imagine the void that was left. If the repeating tasks are in a digital list, one spreadsheet export will trap those tasks for the people who inherit the projects. People in organizations come and go. Responsibilities are shifted from person to person. A well-defined series of repeating tasks for any project prevents the next person from having to start over again.

Summary: Do the Thinking One Time and Let the System Handle the Rest

You will recoup the efforts spent creating this list many times over, not only in the time saved, but in the stress relieved. With all of the tasks captured in the Repeating Task System, you do not have to worry about what may be slipping through the cracks. There is no need to “reinvent the wheel” when a project from last year repeats this year. Let the list handle the details and free you to focus on more creative activities.

4 Managing the Flood of Incoming Information

Expect the unexpected.

Cheryl comes to school feeling organized. On her clean desk is the item she plans to tackle first. Her digital task list displays her *Fab Five* at the top, and the rest of the items are in the order in which she wants to accomplish them. Little does she know, she will soon be drowning in the flood of incoming information.

As Cheryl starts to work on one of her *Fab Five*, the phone rings. She answers the call and then starts to handle the request from the caller before resuming work on her *Fab Five*.

At that moment, a teacher walks in with a request for Cheryl. Cheryl changes gears to handle the request from this teacher, so that she can get back to handling the request from the phone call, so that she can get back to her *Fab Five* item.

Now, the central office calls and wants her to run a quick report. After all, it will only take a second. Plus, if Cheryl does not do it right now, she will probably forget. Cheryl turns her attention to the report, so that she can then return to the teacher's request, so she can get back to the task from the phone call, so that she can get back to her *Fab Five* item.

And then the phone rings . . .

The flood seems endless. Not only do you deal with the phone calls and drop-in visitors, but you also experience the flood of information when you open your email. Worst of all, you interrupt yourself with the thoughts of what you need to be doing. As a result, you find yourself jumping from one task to another as each appears. What if you could deflect this incoming flood and keep your focus where it needs to be?

This chapter focuses on three sources of this incoming flood:

1. Phone calls and drop-in visitors.
2. Email.
3. Those times when we interrupt ourselves.

This chapter focuses on three solutions to those problems:

1. Documentation, so you can deflect the "to dos" from those personal interactions until the right time.
2. An email inbox that reaches "empty" every day, so you can be sure decisions have been made about digital communication.
3. Voice input, so you have a quick way to take what is on your mind and put it in your system.

Every one of those interruptions adds to an already-full plate. Let's look at those phone calls, drop-in visitors, and all of the conversations where you are going to be responsible for knowing what was said and what was promised.

Documentation

Every first-year teacher has been told documentation is important. Countless times during our careers, we are reminded to *document*. How many of us, however, have really been taught *how* to document? Exactly what is it that we are supposed to document? How do we know what is important and what is not? Where do we document?

In practice, very few people have a good ongoing system of documentation. The key element for a person to document on a regular basis is that the system must be *easy*.

During my early years in education, I tried various approaches to documenting telephone calls to and from parents, all without much success. No matter what I tried, the paperwork involved was just enough trouble to cause me to abandon the system.

The Paper Journal

What finally worked for me, and has worked for countless people with whom I have shared the technique, is a simple paper journal. The journal is nothing more than a bound book of lined, blank pages. You can obtain one at any book store. A composition notebook will work equally as well. The important feature is that the size is convenient enough you will have it handy for all phone calls, meetings, and one-on-one conferences.

The journal replaces each of the following items:

1. The notepad that lives by the phone.
2. The back of the scrap envelope we reach for to jot a quick note.
3. Sticky notes stuck everywhere.
4. The napkin in the purse left over from last night's dinner.
5. The grocery list stuck to the refrigerator door.

In short, the journal provides a single place to capture anything you need to record during the course of the day. At the end of the day, decide what needs to be done about what was written.

For those who use the standard Day-Timer or Franklin Planner, you are familiar with the two facing pages for each day. The left-hand page houses appointments and tasks. The right-hand page provides a place for the type of documentation we will discuss. That right-hand page is your "journal."

Here are some examples of what one might find during a day's documentation:

1. A friend calls extending an invitation to a party. While he is relaying the date, time, instructions on what to bring, and directions on how to get there, jot it all in one place—the journal. When the call is over, resume doing whatever it was you were doing, trusting that all of the information is safe.
2. You place an order for some materials over the phone. While placing the order, record the name of the salesperson, his/her extension, the order confirmation number, any discount promised, and other information you might need later.
3. You return a phone call to a parent. On the next blank line in the journal, write the parent's name and take notes. When the call is over, close the journal and resume your next planned activity.

4. You attend a meeting. Take the journal with you and take notes beginning with the next blank line.

No matter how fast and furious the phone rings, how many conferences or meetings you attend, or how many interruptions bring you additional information and tasks, you have it all trapped in one place. No longer will you respond to the "latest thing," fearing you will forget otherwise. With the information trapped in your journal, forgetting has become irrelevant.

Decisions at Day's End

At the end of the day, look at what you have written and ask the question, "What do I need to do about what I have written?" Record any tasks resulting from your notes on your digital task list. When you have dissected any actions that need to be taken and added them to your list, clip the corner of the page in your journal to indicate everything to that point has been handled.

It's a Party

The first example was an invitation to a party. When you review your notes at the end of the day, those notes serve as the trigger to add the party to your calendar. You will also add to your task list any items you need to bring.

When your host invited you to the party, she gave you directions as to how to get there, which you record in your journal. On the day of the party, how are you going to remember you have those directions? Here is a bit of magic about your journal—being able to go right back to information exactly when you need it.

Suppose the conversation about the party happened on May 10. As you review your notes and record the party on your calendar, add this notation in that calendar entry—(5/10). Anything in parentheses in your calendar or task list is going to mean one thing: *Go to this date for more information*. When it is time to leave for the party, that little note that says "(5/10)" tells you to flip back in your journal to May 10. You are now looking at the notes you took on that date, and hence looking at the directions on how to get there.

Where's My Order?

You place an order over the phone with the "Acme Company." When the call is over, your documentation is over. At the end of the day, look at your notes and ask yourself what would be a reasonable amount of time to allow for the order to arrive. On your digital task list, enter *ETR Acme (5/10)*. You learned in Chapter 2 that *ETR* is a quick abbreviation for *expect to receive*, your reminder that someone else owes you something. The date in parentheses tells you where to look for more information. When that date arrives, that entry sends you back in your journal to May 10, the day the order was placed with Acme. When calling to check on the order, the phone number with extension, the name of the person spoken with, the confirmation number, and all other needed information is at your fingertips.

The Mad Dad

This next scenario is a very common one—the teacher taking notes during a call from a parent and following through with the action required. You find in your mailbox one of those little pink slips of paper that says John Smith's father has called.

The way this situation works in all-too-many cases is that we take notes during the call. But where do we take them? Usually, the answer is, "On the back of the little pink piece of paper." We are good at taking notes. We just can't find our notes when we need them. Three weeks from now, when you thought the matter had long since been settled, the parent is sitting in the superintendent's office. Being able to put your hands on the notes you took would be great. Just where is that little pink piece of paper now?

With your journal, as soon as you dial the phone number, write the parent's name and phone number on the next blank line. Now you can throw away that little pink piece of paper.

The father tells you about the problem. He says that other students are picking on his son during your class. While listening, you are probably formulating ideas on how you will handle the situation, perhaps talking individually with several students who sit in that area of the room to gain a perspective on what may be happening. You promise to look into the situation. You also tell the father that you will call him back in two weeks to see if there has been any recurrence of the problem. During the course of the conversation, Mr. Smith rambles a bit and tells you about the house into which the family will be moving and even tells you where it is located. While he talks, you continue to take notes.

When the phone call is over, the documentation is over. You re-copy nothing. You file nothing. Figure 4.1 provides an example of what you might have written.

Notice that during the conversation, you created two "to do" items for yourself:

1. Talking with three boys who may be able to offer valuable information.
2. Call Mr. Smith back in two weeks.

Place a checkbox beside an item that is not just information, but is something requiring action.

You may be able to talk to the three boys before the end of the school day. If so, place a check in the box as your designation that the task has been handled. If not, enter this task on your digital task list to handle the following day. But how will you handle the other task, calling Mr. Smith two weeks later? Create a new task, and enter what you see in Figure 4.2. You can now forget all about Mr. Smith. He is off your mind.

Two weeks later, when you look at your list, you see "Call Mr. Smith (10/25)." Your first thought is to ask, "What's that all about?" The past two

Oct. 25
John Smith- 362-1234
Father called. Says other students are picking on son in math class.
❑Speak with Sam, Tim, and Jerry about what they have noticed.
❑Call him back in two weeks to ask about progress.

Are moving into new house this weekend. Directions- Head north on Main Street. Turn right on Maple. 3rd house on left.

Figure 4.1 Example of Documentation

Call Mr. Smith (10/25)

Figure 4.2 Task Referring Back to Documentation

weeks have been busy, and Mr. Smith is the farthest thing from your mind. The notation "(10/25)" tells you to look in your journal at October 25. Anything in parentheses means "look here for more information." Flip to October 25 and you are suddenly back to the notes made during that conversation. The name, the phone number, a summary of the conversation, and the commitments made during that conversation are all there.

While returning the call to Mr. Smith, you will be looking at the notes taken two weeks ago. Though you may not have given those notes or that call another moment's thought since the original conversation, you are able to demonstrate a good grasp of what had been discussed. You are also establishing a reputation with this man of being someone who follows through on commitments.

During the conversation, you might also say, "By the way, how are things coming with the new house? Let me see if I remember what you had told me. If I go down Main Street and take a right on Maple, isn't it the 3rd house on the left?" Mr. Smith will think you have a great memory. Maybe you do; maybe you don't. Maybe you just have a good system. Mr. Smith never needs to know the difference.

Monthly "Table of Contents"

When you want to find a particular piece of information in a book, how do you do it? Rather than thumb through every page, you go to the table of contents or the index. Here, you quickly scan for a mention of the needed topic and find a page number housing the more detailed information. We will use the same concept with our documentation.

In the example with Mr. Smith, we wrote information in the journal and knew exactly when we would need the information again. What about the information that you may need again, but don't know when?

For example, you order a printer and speak with a particularly helpful salesman. Six months later, you need to order another printer and wish you could put your hands on the notes from that conversation. As another example, you teach 150 students each day as a high school teacher. You hold a parent conference and take notes in your journal. Six months later, you need to find your notes from that conference. How do you put your hands on them?

There is no need to thumb through all of those pages looking for that information. By constructing our own "table of contents," referring back to older information becomes easy. A little ritual, which requires about 20 minutes at the end of each month, will allow any piece of information to be found in seconds.

Our "table of contents" will not be a page in the front of the book. Instead it will be a single, digital document. Whether a phone call happened a month ago or a year ago, you will be able to search for it on this table of contents. Figure 4.3 illustrates how one month's documentation would appear.

May 20*xx*

3. Barber Sales, Dodd, BCI Jane
4. Sue Smith top prize
5. Cookie dough salesman Jones, Milkbox repair
6. Montgomery IEP
7. Baker teacher complaint, Student Council field trip
11. Burns SYETP
12. Order printer MicroLowPrice
13. Pizza Hut compliment
14. Jones DHR attorney, Tate late, Donald Jones painter
17. Jeremy Davis conference retention
18. House paint
19. PowerPrint registered
20. XYA registration number
24. Sungate Records
27. Yearbook meeting
28. Copier lease
31. Manuscript mailed, ethics meeting

Figure 4.3 Example of Monthly Table of Contents

To add a new month to the table of contents, open the document and scroll to the end. Start a new paragraph and enter the title of month and year that has just passed.

Turn in the journal to the first day of the month that has just passed. Do you see any items recorded on that day you would consider of "lasting value"? If so, enter a "1" and add a key word or two for any item on that date that meet your criteria of "lasting value." In our example, nothing of significance was documented for May 1 or May 2. May 3 has three entries that might need to be referenced again. One involved a company called "Barber Sales." Another involving someone named "Dodd." A third involved Jane at a company called "BCI." Continue the process for each day in the month. Generally, the entire process can be completed in 20 minutes.

The beauty of the electronic table of contents is that we need not visually scan the page. Instead, use the "find" command built into your software to locate information. When looking for a particular piece of information, open the table of contents. Use the "find" command (<Ctrl><F> in Microsoft Word, for example). Enter a key word. The software will land on each occurrence of that term. Press <Enter>, or whatever combination works in the software you use, to move from one occurrence of that term to the next. In just a few seconds, you will find the piece of information you need.

In our example with the printer, a teacher talks with a salesman at a particular company and places the order. During the conversation, the teacher records in the journal the name of the company, the salesman, the phone number, order confirmation number, exactly what was being ordered, the price, any discount, and any other pertinent information. When the conversation ends, the teacher creates a task with a due date a couple of weeks in the future. She adds parentheses containing today's date, which will point her back to all of the notes taken during the conversation. The order arrives on schedule, and she checks off the task as "done."

Six months later, the teacher wants to order an additional printer. She remembers how helpful that salesman was and what a reasonable price she was able to get. If only she could put her hands on the notes she had taken, the teacher could easily reach that same company and salesman. The electronic table of contents allows her to do just that.

The teacher opens the document and enlists the help of the "find" command. What key term might be used? "Printer" comes to mind, so the teacher enters the word "printer" in the search window.

As you see, the search lands on the line, "12. Order printer MicroLow-Price" (Figure 4.3). This line was a part of the section labeled "May [and the name of that year]." The teacher now pulls the journal containing information from that month and flips to May 12. The notes taken during that conversation are now in front of the teacher. On the next attempt to contact the company, the telephone number for the company, the name and extension for the particular salesman, as well as all of the details from that conversation will be at hand.

Every day, we are involved in phone calls and conferences with parents. At the time of the conversation, we have little clue as to the need for any documentation. The conversation may simply be routine. On the other hand, what seemed like a routine conversation may erupt into a volatile situation several weeks later. You never know when you will need your documentation.

Monthly "Table of Contents" for Evernote Users

Evernote is a great place to house your Monthly Table of Contents. Create a notebook and name it something like "Journal Table of Contents." Each month, create one new note in that notebook, and title that note with the name of the month and year that has just passed. Within that note, list the numbers down the side and the key words just as you saw in Figure 4.3.

Chapter 8, which covers Evernote, will expand on this theme. For those who like the system of documentation they see in this chapter, but want a way to do it digitally, Evernote provides a method.

The Times You Are Glad You Documented

One principal who has used this system of documentation related an incident about cancelling the contract of a teacher in the middle of the school year. As one can imagine, a key question was, "Do you have enough documentation on this teacher?" The principal flagged pages in his journal and handed the journal to the institution's lawyer for examination.

The lawyer replied the following day, "Yes, there is enough documentation. But, what is really going to help us is not that there is documentation on this teacher, but there is documentation on *so many things*. Your journal shows quite clearly this was not an attempt to single out one teacher. You are taking notes about many things, both good and bad, on a daily basis."

This school leader commented that when he filled up a journal, he placed it in the school's vault. His viewed the documentation in those little journals as that valuable.

Most of what is documented will never be accessed again. Therefore, we do not want to spend a great deal of time in the documentation process. Take a few notes while you are on the phone or in conference. When the conversation is over, the documentation is over. Twenty minutes at the end of the month insures that you can put your hands on any of it whenever you need it. That is easy enough you might actually do it!

Email

Email: Time-Management Tool or Time Sink?

Is email a great time-management tool or a great time sink? Perhaps no stronger love/hate relationship exists in the world of communication than between us and our email. We love the ability to communicate quickly. We love how we can sign up for enticing offers with a single click. We love how we can, with the touch of the "send" key, transfer a responsibility to someone else.

We hate email because every time we check it, someone is adding to our already-crowded schedule. Our best-laid plans for the day fall prey to the next ding of the inbox. Some people feel compelled to live in that email inbox, one that grows with each passing day.

We stress about email because of the combination of junk that masks the valuable information. We also stress because we are often unsure exactly what to do with that good information.

The culprit is rarely the amount of email we receive. Rather, the problem lies in the inability to make judgments in the moment about what the email means, what needs to be done about it, and where to put it. Once we learn to make those decisions, the day will end with an empty email inbox.

Email is the most efficient means of communication available in the world of education. Even if phones existed in all classrooms, statistics from the business world show that approximately 20% of calls are completed the first time. With email, messages are sent at a time convenient for the sender. They are read at a time convenient for the recipient. "Telephone tag" is gone forever.

In addition, email allows the other party to do the necessary research before replying. We have all been caught off-guard by a telephone call where the caller asked for information we did not have available. Email eliminates the awkward game of "I'll get that information and get back to you."

Decision, Decisions: Getting From "In" to "Empty"

Imagine for a moment a person has just arrived home from work. He walks to the curb and takes the mail from the mailbox. He opens the mail and reads it. He then walks back to the curb and puts all of the mail back into the mailbox. It sounds crazy, doesn't it?

The next day, when he walks to the mailbox, he finds today's mail sitting on top of yesterday's mail. After several more days, the mailbox will be stuffed. Even worse, the person will hate that walk to the curb because he knows what mess awaits him.

This scenario sounds crazy, yet it is exactly how all too many people approach their email inboxes. They read a message, and because they don't know exactly what to do with it, they leave it. It is not uncommon to see an inbox that contains every piece of email the owner has received since the day the email account was created. We would not stand for this situation with the mailbox by the curb. Why do we allow it for the digital counterpart?

When you walk away from your mailbox, it is empty. Better yet, it's not empty just *one* day. It is empty at the end of *every* day. How great would it be if only the email inbox operated like the mailbox by the curb?

The key to getting an empty inbox is to *make simple decisions* about each and every item. Therefore, make a practice of only looking at your email when you have the time and energy to make those decisions. At that point, go from top to bottom and make those small decisions at each turn.

Your Email Is Not Your Task List

Your email inbox is a place to trap incoming mail. It's just like the metal mailbox in front of your house. You would never dream of reading your mail and then placing it back in the mailbox. Yet, we do the same thing with the email inbox. Getting from "In" to "Empty" is about making decisions.

Those messages sit day after day, week after week. They sit there for one of three reasons:

1. Some are reminders of places you need to be.
2. Some are reminders of things you need to do.
3. Some embed good reference information.

The information is useful; it's simply in the wrong place.

If you want to get out of your email and get real work done, get in and get out as quickly as possible. Let the email accumulate during the day. Don't worry that you may miss an urgent message. If the message is urgent, email is the wrong medium anyway.

Pick two or three times during the day and handle email as one batch. Keep moving from one message to the next, making decisions, and removing messages from the inbox. You are less likely to dwell unnecessarily on any one email when you realize you have 50 more to go.

One of the advantages of batching your email is that other people realize they will get a response within the next day, not the next minute. People do what is easy. As soon as emailing you a question and getting an instant response becomes easier than the other person doing a little thinking and researching on their own, get ready . . . your time will cease to be your own.

Let's Begin Getting "In" to "Empty"

Delete It

Much of the email requires no action other than to briefly scan it and hit the delete key. Examples include advertisements of no interest, jokes, threads from discussion groups, and FYI courtesy copies. If the email program allows the ability to sort the email by "conversation," sorting in that manner provides a significant time-saver. All mail related to a single subject appears together. If the subject is of no interest, delete the entire thread at one time.

Schedule It

Tom opens an email from his superintendent announcing the administrative retreat you see in Figure 4.4. The email tells him the date and time. It includes the address and directions for getting to the location. It also includes the agenda.

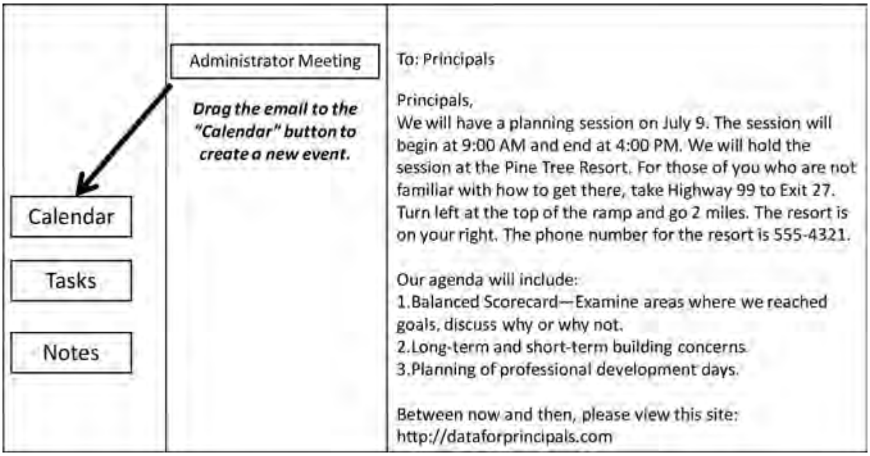

Figure 4.4 Putting an Email on the Calendar

"This is good information," thinks Tom. "I will leave it right here in my email, where I will know where it is." Of course, this retreat does not occur for a month. So, for a month, that message sits, sinking farther and farther down the long list. By the time the retreat rolls around, Tom is madly searching for it.

Mike gets the same email. He knows his email program and calendar software well enough to know a method of sending emails to the calendar.

For example, for many years, Outlook has offered users the ability to "drag and drop." The user clicks on the email and drags it to the "Calendar" button. Outlook opens a new appointment. The subject of the email automatically populates the subject line of the appointment. The body of the email is displayed in the note section of the appointment. Set the date, set the time, set an alarm, and save the appointment. The information is now on the calendar for the appropriate date, and is synced across all of Mike's devices. The whole process takes only a few seconds.

What capabilities does the email program you use have to integrate with your calendar? At worst, you would be able to highlight and copy the body of the email message, and after creating a new calendar event, paste the information into the note section of that appointment. At best, a simple menu option in your email program automates the process, copying the subject line of the email to the name of the appointment, the body of the email to the note section of the appointment, and possibly harvesting the date and time from the body of the email and adding that information to your calendar.

Do It

Tom reads the email about the retreat and notices that it also mentions visiting a particular website and reviewing the information contained in it prior to the retreat. Tom recognizes this instruction as "one more thing to do" and sighs. Why did he want this job after all?

Tom has every intention of reading the material at that website, and hopes leaving the email in his inbox will remind him. Alas, as the email slips past the first screen, he never again thinks about the assignment. He arrives at the retreat—late again—because he couldn't remember the starting time and couldn't find the email. As far as having read the assigned material—well—it just didn't happen.

Mike read the same email and recognized reading the assigned material was a "to do." If he wasn't going to read it right then, the proper place for it is his digital task list. Mike knows his email program and task management software well enough to use a method of sending emails to the task list.

For example, long-time Outlook users may know about the ability to click an email and drag it to the "Task" button. Outlook creates a new task. The subject of the email becomes the subject line of the task, but the user can edit it. The body of the email appears in the note section of the task, which the user can also edit. Set a time when the task should be viewed again, and delete all of the information in the note section except the link to the assigned website. Save the task. Delete the email.

One of the criteria we established for choosing a digital task list is its ability to communicate with your email. You saw just such an example with Outlook. However, any good web-based task manager will provide a feature for moving an email to a task.

In the settings menu for the digital task list, look for an email address that is assigned to you. The significance of that email address is that anything sent to that address will automatically appear on your task list. The strategy is to put this special email address in your contacts. Give the contact a name, such as "To-Do List," "Tasks," or whatever you choose. In the settings menu for your digital task list, set the default start date and end date for your tasks to "Today."

Mike uses just such a web-based list. After recognizing the email as a task, Mike follows this set of steps:

1. Mike hits "Forward."
2. In the "to" line, he enters the contact he has associated with his digital task list.
3. Mike edits the subject line as needed. The wording of the subject line in the email will become the wording of the task on his list.
4. He indicates a due date. Many lists allow the user to insert the desired due date in the subject line. The task will show up on the task list with that due date already assigned.
5. Mike hits "Send."

The great thing about these web-based lists is that you can forward this email from your desktop computer, laptop, or any mobile device. Remember, one of our criteria for choosing a digital list is its ability to synchronize across devices. Your mobile devices will need the app for whichever web-based task manager you choose.

Several days before the retreat, the reminder to read the assigned material is in the task list, right where Mike had scheduled it. In the note section of the task is a clickable link to the assigned material. Mike reviews it. On the day of the retreat, he shows up on time and prepared—as usual.

Delegate It

Perhaps someone else really needs to be handling this message. Forward the message to the appropriate person. Before you delete the email, do you have a vested interest in following up on this issue?

If you are using a web-based task list, one simple technique will make follow-up easy. Send a "blind courtesy copy" to your task list. Remember the email address for your task management system that you added to your contacts? Put that contact in the "bcc" line. The item will appear on your task list with the entire body of the email in the note section of the task. Figure 4.5 shows how that email might look.

The next time you look at your list and see this item, edit the name of the task as needed and assign a due date for when you want to see it again. The result would resemble Figure 4.6.

For those whose method of sending emails to the task list is "drag and drop," when sending the email, bcc yourself. A copy winds up in your email

From: Bill Smith
To: Mike Jones
Subject: Invitation to training

You are invited to send one teacher to a special training on the new standards for fine arts. The attachment provides all of the details. Please provide the name of the teacher who will be attending no later than March 1.

Mike will "forward" this message to the teacher he has in mind (Ed Davis). He will "bcc" his digital task list.

Figure 4.5 Delegating by Email

☐ ETR Ed Davis—Response on whether he wants to attend Feb. 22 ☐

Send name of final selection to Bill Smith

On the digital task list, Mike edits the task, assigns a due date, and adds follow-up task.

From: Bill Smith
To: Mike Jones
Subject: Invitation to training

You are invited to send one teacher to a special training on the new standards for fine arts. The attachment provides all of the details. Please provide the name of the teacher who will be attending no later than March 1.

Figure 4.6 Delegated Item on the Digital Task List

inbox, complete with the original message and the text you composed in the forwarded message. "Drag and drop" the email to create a new task. The body of the email message will populate the note section of that task.

Another example of delegating through email relates to orders placed with various vendors. When you place an order, a confirmation generally arrives via email. The confirmation contains all of the information you would need for follow-up should the merchandise not arrive on time. Figure 4.7 provides an example of an email confirmation you might receive.

This merchandise should arrive in about three weeks. Most people leave the email in the inbox for the next three weeks, hoping it will serve as a reminder if the order does not arrive. What actually happens is that they look at that email 37 times a day until it rolls past the first screen. It is now out of sight and out of mind. Four years later, that email is still in the inbox.

From: XYZ Store
To: Mike Jones
Subject: Your order

Thank you for your order to the XYZ Store! Your order is as follows:

4 Calling Birds @$29.95..$119.80
3 French Hens @$15.00..$45.00
2 Turtle Doves @$20.00..$40.00
1 Partridge in a Pear Tree @$104.99..$104.99
Total..$309.79

Mike will "forward" this message to his digital task list. Before sending, he will edit the subject line and add a due date.

Figure 4.7 Follow-Through on Order Placed

You know a better way. Send that email to your task list. Edit the subject line, so that "Thank you for your order" now becomes "ETR order from Acme Co." Assign a due date representing the day you wish to see that information again. The entire body of the email is neatly tucked away in the note section of that task. The result is depicted in Figure 4.8. You can now delete the email!

Controlling email is about making decisions. When the confirmation arrives, ask the following question: "When do I want to see this again?" From the earlier example, you know that an Outlook user would "drag and drop" the email on the "Task" button, set a due date for three weeks out, edit the subject line as needed, and save.

☐ ETR XYZ Store Dec. 5

From: XYZ Store
To: Mike Jones
Subject: Your order

On Mike's digital task list, he will be reminded on Dec. 5 about the order he placed. Opening the note reveals the details.

Thank you for your order to the XYZ Store! Your order is as follows:

4 Calling Birds @$29.95..$119.80
3 French Hens @$15.00..$45.00
2 Turtle Doves @$20.00..$40.00
1 Partridge in a Pear Tree @$104.99..$104.99
Total..$309.79

Figure 4.8 Order Appears on Digital Task List

Save It

Some of the email we receive requires no action, or if it does, we have already taken that action. The content of the email, however, is of lasting value. Where do we put this type of email? Let's examine several scenarios:

The Text of the Email Is of Lasting Value for Documentation Purposes

The reason for saving this information is so that it can be retrieved should someone ask for it. The value lies in lending proof of what was communicated and when. We save these emails "just in case" we need them.

You and I know people who have created dozens upon dozens of folders in their email programs, one folder for each person with whom they correspond. The more folders you have, the more time you will spend filing emails in the correct folders. The more folders you have, the greater your chances of misfiling. You don't need that elaborate set of folders—you need *one folder*. In fact, I would suggest naming that folder "Just in Case." Send all emails you are saving "just in case" you need them to that one folder. Most of them will never be needed again. If you do need one, searching and/or sorting the folder by person, subject, or date will retrieve the needed information.

Some email programs offer an "archive" function that accomplishes the same purpose as the "just in case" folder. Archiving removes the email from your inbox but allows you to search for it when needed.

The Text of the Email Is of Lasting Value Because of the Subject Matter

For example, the text of the message contains a good set of questions for teacher interviews. This email embeds good *reference* information. For years, I used Outlook's "Notes" module. A "drag and drop" of that email to "Notes" would serve as one option.

A second option would be to save that email on the hard drive with other information related to that subject. The "Save As" command on the "File" menu of many programs allows the user to save the email message as a text file. Perhaps save that text in your digital reference filing system, perhaps in a folder called "Personnel Management." If inside the Personnel Management folder a folder labeled "Interview Questions" already exists, that subfolder would be the ideal place. Before saving, edit the name of the email to best reflect the contents.

The Email Has an Attachment of Lasting Value for Documentation

Drag or download the attachment to the desktop and put it in the appropriate folder. In the next chapter, you will read about a folder on my computer entitled "Memos & Letters." That folder will serve as a place for many miscellaneous documents being saved solely for documentation purposes.

The Email Contains Information I Would Like to Have At-Hand

This book talks about concepts and strategies that will be long-lasting rather than introducing specific software applications that may be here today and gone tomorrow. The exception is Evernote. In Chapter 8, you will read about an effortless way to send emails to Evernote from any of your devices. When you have information that you would like to be able to access from anywhere on any device, storing it in Evernote is an excellent choice.

"In" Becomes "Empty"

The important point is that you make a decision about each piece of email, and do so the first time you read the message. Delete the junk. Act on the items that need action, and then delete or archive. Forward items for someone else's attention along with a copy to your digital task list, and then delete or archive them. Identify messages that need to be saved as reference information and send them to the appropriate places. Soon, "In" becomes "Empty."

Sent Items: Your Permanent Record

One of the reasons I prefer email over other forms of communication is that it provides an instant record of what we have told other people and when we told them. By clicking "Sent Items" and typing a key word into the search box, you can put your hands on practically any message you have transmitted. The list can also be sorted by date or recipient, further allowing needed information to be found quickly.

Should there be any disagreement over what had been discussed via email, referring to the "Sent Items" and forwarding to the other person a copy of the pertinent email message clears up all doubt.

Other Email Tricks

1. Check email only at designated points in the day. Email becomes an interruption and a time-waster when we check it constantly throughout the day.
2. Handle all email in one group. Go from the top of the list and do not stop until you reach the bottom. Make a decision about each message. Use the strategies outlined earlier in this chapter to get the inbox empty.
3. Respond to the "easy wins." Some emails require only a quick response. Give that response immediately and then delete the email if it is of no further value.
4. If the response is going to take some time, and possibly some research, buy some time. Send a quick response to let the person know the message has been received and you will be getting back to them. Now, send the email to the task list.
5. Quickly scan email first thing in the morning for any urgent messages, but then delay handling the bulk of it until mid-morning. Begin the day with the tasks you had *planned* to begin your day. Once the day is shaping up according to plan, you are likely to handle email quickly and get back to working through your task list. If you begin the day with email, you may well get so wrapped up in reading and responding that the day gets away with little actually being accomplished.
6. Create subject lines that are descriptive of the messages. The person who receives your email will be able to tell a great deal about the contents without even opening it. While a subject line saying "Meeting," would convey little, a subject line saying "Staff meeting October 23 at 9:00 in the Board Room" gives the receiver a much clearer picture of the nature and importance of the message. At times, the entire message can be put in the subject line. "Your leave request was approved," "The figures you needed are attached," and "Can you meet with me Friday at 2:00?" are examples of how one can convey the entire message in the subject line.

7. Keep messages short. If at all possible, limit the message to one screen of text. If the message runs longer than that, look to see if several different subjects are being covered in the same message. If so, consider breaking the email into several short messages, each handling a different subject.
8. Front-load the message. Begin by giving the reader an idea of what he or she will need to *do* about your message. Include the most important information towards the beginning of the message. Let the lesser-important details bring up the tail end.
9. Save time by creating a signature line. The signature line can include anything you like. Typically, your name, title, organization, address, telephone, and email address are good pieces of information to include. The signature line is to the email what letterhead is to written correspondence. Consulting the "Help" section of any email program provides instruction on how to create a signature in that program.
10. Avoid printing email messages. The advantage of digital data is the ease with which it can be stored, searched, retrieved, shared, or edited. When you print digital data, all of these advantages are negated. People often print email because they are simply used to handling paper. Old habits can be hard to break.

Voice Input

The 1990s was a great time to be organized. The paper planner served as one's ultimate signature tool. Armed with that book, when a new task presented itself, the person would simply decide on a day, open the book to that page, make the notation, and close the book.

Those who remember the Palm remember the convenience of having a digital calendar, task list, etc., but also remember how cumbersome entry on the device could be. We used a stylus on a flexible piece of plastic and carefully formed those special characters known as "Graffiti." Soon thereafter, devices emerged featuring mouse-sized keyboards. They did offer more accuracy and a certain degree of speed. Still, they lacked the flexibility and convenience of paper and pen. The next generation of mobile devices offered typing with two thumbs on a piece of glass.

Clearly, input on mobile devices has been the weakness. All the while, something else has been getting better—voice recognition. Every platform of mobile device developed its own "digital assistant." Now, we have something actually easier than paper and pen.

Do you know the command on your mobiles devices that will trigger adding a task to your task list? Because our devices are constantly changing and improving, this book makes no attempt to list the specific tools. My website, or a quick Internet search, serves that purpose.

Mary, the principal of a large middle school, walks down the hall during a class change. Noticing a stained ceiling tile, she assumes the problem to be a leaky roof. She pulls her phone from a pocket, and with the push of one button invokes her digital assistant. She says, "Repair—Report roof leak on 7th grade hall." She follows up with a second command, "Repair—Have ceiling tile replaced on 7th grade hall."

As she walks down the hall, a teacher stops Mary to mention one of their students had become seriously ill over the weekend and has been admitted to the hospital. Mary thanks the teacher, and fully intends to make a call to the parents and possibly visit the student. Maybe she would remember; maybe she wouldn't. Mary does not leave to chance this opportunity to extend her thoughts to the student and the family. The phone reappears. She invokes her digital assistant. "Call Sara Brown's mother regarding Sara's illness," she says.

The halls clear and Mary will wait several minutes before visiting some of the classrooms. She takes a quick look at her email on the phone, and sees several to which she can quickly reply. Rather than type the replies, she dictates them.

When Mary returns to the office, the tasks she added to her phone via voice are not only on her phone's digital task list, but are synced to the task list on her computer as well. Mary escapes rewriting, sticky notes, and the possibility of forgetting. Her task list is the one place she looks. Voice input makes input so easy, she wouldn't think of trapping this "on the fly" information any other way.

Summary: Surf the Wave Instead of Drowning in the Flood

While time is constant, the demands on it ebb and flow. At times, work arrives quicker than we accomplish it. What we need is a way to trap it all so that nothing falls through the cracks. When the flood recedes, we look at what we trapped and organize it in a manner that leads to the accomplishment of the right things in the right order by the right person.

5 Handling Multiple Projects

You can see the forest AND the trees.

To this point, we have worked with identifying the things in our lives that need to be handled and putting them all in one place, allowing us to see all of our choices. We have talked about wording our tasks clearly. That way, we know exactly what to do. We have put our tasks in order so that our days have some degree of logical flow. We have paid special attention to those tasks that repeat so that once we have identified them, we never again have to worry about forgetting them next week, next month, or next year.

Projects Are Different

Projects are entirely different from other tasks on the list. Checking off a single task does not complete a project. We complete projects through *multiple steps*. Sometimes, we can list every step in the project from beginning to end. With others, the steps unfold as we work. To compound the problem, we are generally handling multiple projects at any one time. How in the world can we keep it all straight?

The following example illustrates how complex even a relatively simple project can become. Imagine a teacher who wants to acquire a new interactive whiteboard for the classroom. The goal would obviously be accomplished when the teacher sees the board installed on the wall. Until that point, something else remains to be done.

The teacher feels the first step toward accomplishing the goal would be to talk to the principal about the request. What about the second step? As the following paragraph illustrates, that answer is not so clear.

During that meeting, the principal may state that several new interactive whiteboards are already on order, that the principal had been trying to decide who will get them, and that the teacher's request has just swung the answer in that teacher's favor. At that point, the teacher's next step would simply be to follow-up about installation.

On the other hand, the principal may say that funds are tight and perhaps the PTA could help with the purchase. In this case, the teacher's next step would be to fill out the proper form and write a short proposal to submit to the PTA.

A third scenario would be that the principal states no funds are available and offers no alternative suggestions. At this point, the teacher may think in terms of anything from requesting funds from a legislator to hosting a bake sale.

The outcome of that one conversation with the principal could easily lead to any of three entirely different second steps. Each of those three responses sends the project in a different direction. Imagine how many different twists and turns could take place over the life of the project. A timeline for securing all of the needed funds, choosing a vendor, and negotiating a deal are among the steps between here and that interactive whiteboard being used with students.

Projects often work just that way. Keep in mind, this project is but *one* among several dozen the same teacher may have in motion at the same time.

Project Execution: The GPS of Life

When setting out on a journey to an unfamiliar destination, a GPS makes all the difference. Put in the destination, and the charming voice says, "Turn left out of the driveway." If the road happens to be blocked and you are forced to turn around, the voice responds, "Recalculating. Drive 500 feet and turn right." The destination stays the same. The next step changes.

That's how projects work. We define the goal—what the finished product will look like. With that vision in mind, we will know when we have reached our destination. Along the way, we make adjustments so we are constantly moving toward that destination.

What you will learn in this chapter is a method for handling an entire project, from beginning to end, through one task on your digital task list. Your goal, the next step toward getting there, all other information related to that goal, the location of all paper supporting documents, and the location of all digital supporting information, will be housed in that one task.

Keeping projects on track involves some very specific strategies:

1. Define the goal.
2. Break the project into individual tasks.
3. Put the next step and the related goal on the task list.
4. Keep related information with the project.
5. Stick with one project as long as you can.
6. Put a "bookmark" in the project.
7. Organize the supporting material.

Andy is a newly appointed assistant principal. Two weeks into the job, he is doing his best to adapt to the number and variety of demands on his time and attention. An array of sticky notes lines his computer monitor. He had read somewhere that he needed to keep his goals visible. Every time he looks up from his work, the three sticky notes in Figure 5.1 grab his attention.

The start of the school year is three weeks away, and Andy's figures are showing he is 40 math books short in 6th grade. Having just inherited the responsibility for textbooks, he is not sure what to do. All he knows is that his days are busy with phone calls, emails, and drop-in visitors. Every

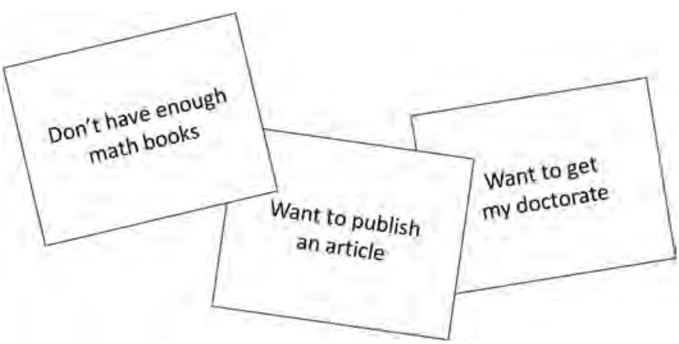

Figure 5.1 Get Rid of the Sticky Notes

time he looks up, he realizes time is ticking, and something has to happen about math books.

Andy had been an outstanding classroom teacher, and it was his classroom control and positive rapport with students that was largely responsible for his promotion to assistant principal. Andy enjoyed reading professional literature. “One day,” he thought, “maybe I could write an article.”

Andy had another personal goal. A bright, energetic young school leader, he wanted to go back to school and earn his doctorate. Yes, a sticky note served as a constant reminder. However, just like having an article published and securing math books for his students, Andy was making no progress.

Define the Goal

Handling a project begins with defining the goal. What will the project look like when complete? How will you know when you have achieved your goal?

Our process starts with phrasing the goal as a statement that is either true or false. Once the statement is true, we are done. Until that point, we still have more to do. Figure 5.2 takes Andy’s three “problems” and turns them into well-defined goals.

The math book problem poses the simplest challenge. As for the article on classroom management, completion can be defined as submitting the article to the publisher. With the advanced degree, Andy realizes he must first handle the hurdles associated with being *accepted* to the doctoral program.

With the goals rephrased, Andy is closer to being able to make headway. However, he needs a better way to display his goals. The host of sticky notes simply diverts his attention from the job at hand and makes him feel guilty about what is left undone.

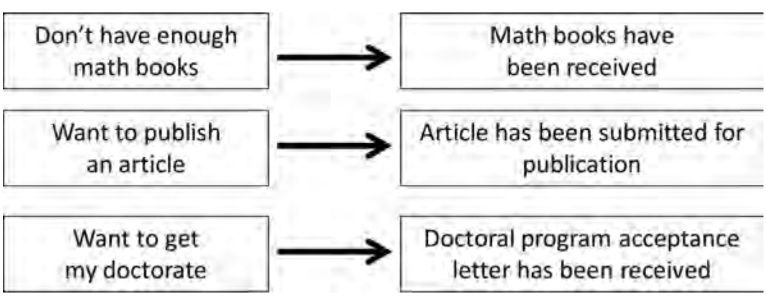

Figure 5.2 Projects With Well-Defined Goals

	Task	Due Date	Note
☐	xx Math books have been received	Jul 25	☐
☐	xx Article has been submitted for publication	Jul 29	☐
☐	xx Doctoral acceptance has been received	Jun 4	☐

Figure 5.3 Projects Entered on the Task List

The place for these goals is Andy's digital task list. What you are about to learn is a method for staying on track toward your goals (the destination on the GPS) by defining and updating the next steps (the turn-by-turn directions).

Andy creates three new tasks on his task list and enters the three goals, each phrased as if it is already completed.

Notice in Figure 5.3, that each goal begins with an *xx*. In a moment, we will put something on the *other* side of that *xx*. You will come to see its function—a demarcation between the goal and the next step toward its completion.

Break the Project Into Small Steps

Andy realizes acquiring the math books may take a number of steps. Regardless of the number of steps, the goal for this project is simple: "Math books have been received."

Andy creates a new task in his digital task list. On the subject line, he enters *xx* and his goal. He now asks himself the question, "If I am going to move this project forward, what's my next step?" The next step is usually something completed quickly and relatively easy. It may be a phone call to place, an email to send, a face-to-face conversation to initiate, or an Internet search to conduct. The only hard part is deciding what that next step is going to be.

Put the Next Step and the Related Goal on the Task List

Andy learns that "Sharon" is the person in charge of textbooks for the school district. He figures a good next step would be to contact Sharon about his

	Task
☐	Email Sharon re: # of books needed xx Math books have been received
☐	Outline article xx Article has been submitted for publication
☐	Look at univ. website for admission requirements & timeline xx Doctoral...

Figure 5.4 Next Steps and Goals

need. He decides an email to Sharon is his best bet, but does not have time to compose that email right now. On the *other* side of the *xx*, Andy enters, "Email Sharon."

Andy moves on to the classroom management project. He has defined his goal—submission of the article. At this point, he has not a single word on paper nor has he made any contact with a potential publisher. Where will he begin? What is his next step toward seeing a published article?

Andy decides he should probably first create an outline of what he wants to say in this article. He already has the goal on his list. To the left of the *xx*, he enters, "Outline article."

Andy moves on to his dream of acquiring a doctorate. He has an idea of the university he would like to attend. What he does not know are the procedures for being accepted into the program or the timelines. Andy figures a good place to start would be to visit the website for that university. He already has the goal defined on his list. On the left side of the *xx*, he enters, "Look at university website for admission requirements and timeline." His task list now resembles Figure 5.4.

Instead of worrying about a problem with math books, an article on which he is making no progress, and an elusive degree, Andy is focused on something different. He is going to be writing an email, outlining an article, and visiting an Internet site. His day just got much more doable.

Keep Related Information With the Project

Andy drafts and sends the email to Sharon. As he awaits her response, other thoughts occur. A teacher tells Andy she thinks a certain school across town has a surplus of math books. If Sharon is not able to supply the needed books, this information will be valuable. Where can he record that information? One of the math teachers delivers a note to Andy that says there have been problems in the past getting the correct edition of the book. The note mentions the correct edition number. Not wanting to start taping notes around the computer monitor, Andy searches for a better place.

Even the simplest projects generate bits of information that need to be trapped somewhere. Most people are at a loss for where "somewhere" might be. The note section of the task is the perfect place for all information related to completing that project.

The note section can include additional steps toward completing the project. It can include reference information about that project. If a paper file folder or digital document contains information related to that project, in the note section list where this additional information is located. Figure 5.5 provides a template for how one task can hold all of the information for a project.

The specific example, the math book project, might look like Figure 5.6.

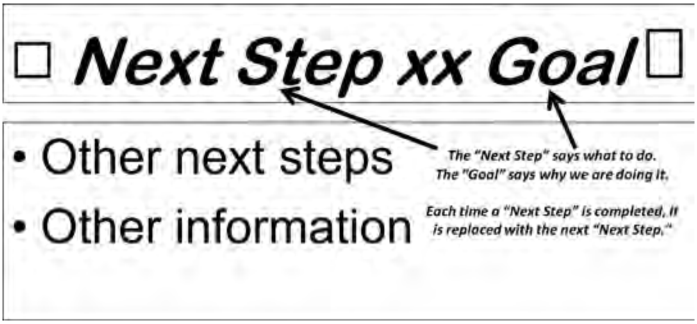

Figure 5.5 All Project Information Housed in One Task

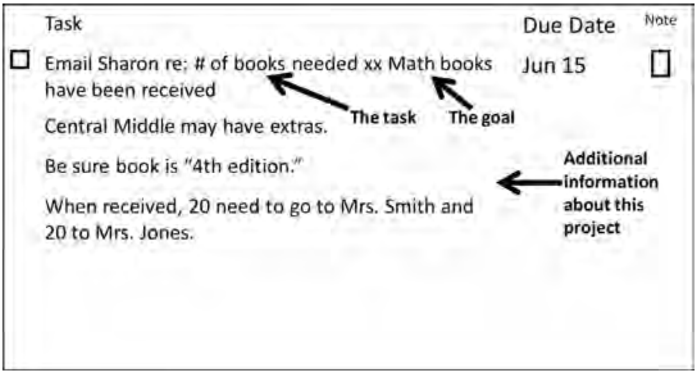

Figure 5.6 Math Book Project

Once Andy sends his email to Sharon, he does not "check off" this task. In fact, the task will not be "done" until the goal he wrote—"Math books have been received"—is true. What Andy will do is change the *next step*. He deletes "Email Sharon" and replaces the text with "ETR reply from Sharon." Remember, "ETR" stands for "Expect to receive." The next step on this project is that he is expecting to receive a reply. As easy and obvious as this step may seem, failure to log it results in details that slip through the cracks. If Sharon doesn't read her email and Andy gets busy and forgets he is expecting a reply, school will start and 40 students will be without a math book. Follow-through is essential, and what you are learning here gives you the tool to make it easy.

Sharon's reply could take a number of forms:

1. The warehouse has many surplus copies of that math book, and they will be delivered tomorrow.
2. The book is on back-order and copies will not arrive until the third week of school.
3. There are no available copies in the warehouse and no money to purchase new ones.

When Andy gets his reply, he figures out his new next step and places it to the left of the *xx*. His task list holds every project with the goal spelled out, the next step identified, related information in the note section, and a due date reminding him of when he wants to see this task again. Nothing falls through the cracks.

Stick With a Project as Long as You Can

As you look at your list and see your multiple projects, should you perform the next step from "Project A" then the next step from "Project B" and then the next step from "Project C"? Or, should you start work on "Project A" and continue with that project, clicking off task after task?

You accomplish more by sticking with one project as long as possible. A person always experiences some time spent in "start-up" when transitioning to a project. Gathering materials and getting mentally reacquainted with the project take time. The more a person jumps back and forth between projects, the more time these transition activities will occupy.

People often put off a project, but when they get started, a certain "flow" takes over. They don't want to stop. The creative juices are flowing. Leave the project, and the motivation quickly subsides. If at all possible, work on projects in larger chunks of time. Working in large chunks minimizes the start-up and wind-down activities associated with them.

Put a Bookmark in the Project

At one time or another, each of us has read a book from cover to cover in a single sitting. This experience, however, is the exception rather than the rule. For one reason or another, the book must be put aside in order to do something else. Just before closing the book, we *insert a bookmark*. This little tool tells exactly *where to begin* the next time we resume reading the book.

The same principle holds true for our projects. During a block of time, you may work uninterrupted on one project. You find yourself completing one next step after another. However, at some point, you leave that project. Any number of reasons could account for needing to move on to something else:

- You have an appointment.
- You have other urgent matters that need your attention and cannot afford to spend any more time on this project right now.
- You are getting tired and need to take a break.
- You need information in order to continue the project, and you do not have that information at hand.
- You see that the next step toward accomplishing your goal is to contact another person, and that person is not available.
- You are interrupted by an emergency.

The list could go on. Whatever the reason for putting the project aside, you need a "bookmark." Before leaving that project, ask the question, "When I resume this project, exactly what will I be doing next?" The answer to that question goes to the left of the *xx*. You can safely move on, knowing that the next time you resume this project, you will be able to pick up exactly where you left off. The wasted motion is eliminated.

Organize the Supporting Material

Managing a project includes organizing and being able to quickly access the supporting material. The project generates paper, and you create a folder for that paper. Where do you put it? When you work on the project, what reminder will you have that this project support folder exists? The project also generates digital documents and digital notes. We must answer the same questions about them.

The next two chapters will answer the question, "Where do I put it?" Regardless of where the supporting material is housed, the note section of the task will point you to every bit of it.

Summary: Build a Reputation for "Staying on Top of Things"

You can stay on top of multiple projects. At times, you may feel like a juggler. In a way, your role in handling multiple projects and the role of a juggler are much the same. A juggler keeps a number of balls in the air by *giving each one a little attention on a regular basis*. The juggler knows just how many objects he has in the air, where each one is, when attention is needed, and how much attention is needed. We need to know exactly the same thing about each of our projects.

The reality of school leadership is that we have much on our plates. We need tools to help us stay on top of it all. This chapter gives you those tools. You can not only handle multiple projects, but you can make it look easy.

6 Where Do I Put It? . . . It's Paper

A place for everything, and everything in its place.

—Ben Franklin

Our discussion to this point has focused on the "doing." We have set up the tickler file to track the papers that will require action on a certain date. We have stored our tasks in software that will present them at the right time. Our repeating tasks will return on schedule. We have learned to incorporate emails requiring action into the task list. Finally, we have created a system that keeps our goals and projects visible, while at the same time filtering into the task list the individual steps toward their completion.

What about the information that requires no action? We do not know exactly when we will need it again. However, when we do need it, how will we find it? Each file will be categorized in one of three ways: Reference Files, Current Projects, or Fingertip Files (see Figure 6.1). This chapter focuses on paper files. The next two chapters retain the same methodology with the digital counterparts.

Figure 6.1 Three Types of Files

Fingertip Files

Each of us has those few documents to which we refer to regularly, so regularly, we want to have them "at our fingertips." For example, a high school principal refers to the school's master schedule so often that retrieving it from a filing cabinet would prove cumbersome.

Other examples might include the bell schedule, a list of teacher birthdays, or school letterhead. The examples will differ from person to person. Identify the candidates for your *Fingertip Files*. Place them in a notebook or folder that you can reach from your desk.

Current Projects

Projects do not just generate tasks. They also generate information, and some of that information is in paper form. If the project involves submitting a grant, the first piece of paperwork would likely be the grant application, and you would need a place to put it. As soon as you undertake a project and the first piece of related paperwork appears, create a folder for it.

Designate a file drawer in the desk or credenza for *Current Projects*. If you know that you will be working on a project on a particular day, especially if you will be working on that project some place other than your office or classroom, you may want to pull that project's file and put it in the tickler file to reappear on the designated day.

Bulk Items

When paperwork arrives and needs attention at some future date, you already have a place to put it. Throw it in the tickler file. What if the item is bulky? For example, a microscope needs repair and you plan to deliver it to the appropriate person on Friday. Where do you put it from now until that time? You have a box of books to donate to charity and plan to take them on Tuesday. What happens to that box of books until then? A new box of books arrives. Normally, newly arriving paper would go into *In*, but this incoming box is too large. What now?

For each of these examples, designate a spot for bulk items that need some type of attention. An empty shelf is a possibility. An empty cabinet will work nicely. To make this bulk holding area work, two factors must be in place:

1. The designated shelf or cabinet can be used *only* for bulk items needing some type of action. Do not let that spot *also* accommodate items that are to be stored there permanently. If used properly, that bulk storage spot will spend the majority of its time *empty*.
2. Some *trigger* must be present that sends you to that bulk storage spot. Putting a reminder on the task list for the appropriate day to deliver the books, take the microscope for repair, or unbox the newly arrived set of books will prevent those bulk items from being forgotten.

I have a weekly repeating task that instructs me to "Check Bulk." That task has me simply look at what is in my *Bulk* area and be sure a reason exists for why any item is still there. Some task on the list should make reference to this item along with what is supposed to be done with it. That weekly check will keep items from sitting in *Bulk* with no trigger as to what needs to happen with them.

Concluding a Project

What happens when the dance is over? The project is complete, yet the folder remains in your *Current Projects* drawer. For the system to work, the drawer for *Current Projects* must remain current. Part of declaring a project "complete" is to remove the file of supporting information from *Current Projects*.

Consider whether or not you need a "paper trail." Perhaps this same project or a similar one will be undertaken in the future. Perhaps the notes from this project will be shared with someone else. Depending on the project, the requirement that records be maintained for a period of time is highly probable. If you see no reason to keep any of the material, put the supporting paperwork in the trash can. Use a paper shredder for anything that could possibly be confidential. Stanford University conducted a study that found that 87% of filed papers were never looked at again (as cited in Pollar, 1999). If you are not required to keep it, and you see no value in keeping it, get rid of it.

If you save records from your project, spending a little time with cleanup makes the difference between concise records that are self-explanatory years later and the burden of picking up a thick, barely decipherable folder. Go through the supporting folder item-by-item. Get rid of duplicate copies and cryptic notes.

Reference Files

The most familiar concept is that of reference files—the folders that populate the filing cabinets in the corner of the room or office. While we are familiar with the concept, the overstuffed drawers and illogical arrangement may make using them a chore.

Over the years, we accumulate lesson plans, professional development ideas, inspirational stories, and a host of other materials that enrich our lives and the lives of those around us. No matter how good the material is, it is of little value if we can't find what we need. Likewise, we keep records of student performance, teacher performance, financial expenditures, and an equally large host of other materials that provide an overall record of what happens in our school or classroom. That rich supply of data is useless if finding it is difficult.

If you are new to your position, do not be surprised if you find overstuffed filing cabinet drawers, many unfiled papers, and a filing system that defies logic. People on their way out the door are generally less concerned about a pristine system than people coming into the job. Rather than simply trying to work with what has been left, do not be afraid to empty the entire contents of the filing cabinets onto the floor and start from scratch. The starting point is a logical filing system.

Reference Filing Basics

These basic principles serve as a foundation for setting up and maintaining reference files:

1. Use manila file folders instead of hanging files. They take up far less room, and are less expensive.
2. Use a noun to begin the file name.
3. Use broad category names.
4. Use subheadings to divide the broader categories. Examples: Assessment—Graduation Exam; Assessment—Math Placement; Assessment—Writing.

This arrangement will keep all assessment data together. Files labeled "Graduation Exam," "Math Placement," and "Writing" would be spread through various parts of the filing cabinet.

5. For teachers, arrange chronologically material that supports lessons. For those who teach the chapters of a textbook in order, arrange supporting material the same way (Geometry—Chapter 1 Section 1; Geometry—Chapter 1 Section 2, etc.). For those who organize their instruction around themes or standards, organize the supporting files the same way.
6. Teachers may wish to organize lesson materials in milk crates, with each crate corresponding to a unit. All handouts, manipulatives, posters, bulletin board material, etc. for that unit can be stored in the crate.
7. Examine the contents of the files annually. While the system is designed for documents of long-term value, certain material eventually outlives its usefulness. Right now would be a good time to create a repeating task in your system reminding you to purge your reference files each year on a certain date.
8. For files in which no additional material will be added and are rarely accessed, consider storing them in another area of the building.

In the next chapter, you will examine the filing system on the computer. Having paper and digital systems that parallel each other makes filing and retrieval easy. Doing a good job with establishing this paper reference filing system will make composing its digital counterpart easier.

The Temporary Trash Can

How often do you receive paperwork that probably will never need to be looked at again, but yet you are not comfortable with throwing it away just yet? A flyer for a workshop appears in the mail. You are not interested in going, but just as soon as it hits the trash can, a teacher will ask about the information for that very workshop.

Today's mail includes a letter from Mr. Smith. No action is required, and it is probably the only letter you will receive from Mr. Smith all year. Creating a file folder for one piece of paper seems a waste. What do you do with this type of information? What sort of system can allow for quick filing and relatively easy retrieval?

I devote one filing cabinet drawer to this type of material. The file drawer contains 26 hanging file folders labeled A–Z. The letter from Mr. Smith goes in the *back* of the "S" folder. The flyer for the Acme workshop goes in the back of the "A" folder. You will probably find there are a few people from whom numerous memos or other forms of communication are received. Those people are assigned their own folders. If you regularly receive memos from your superintendent, Dr. Jones, create a "Jones" folder and place it in the Temporary Trash Can just behind the "J" folder.

Why file to the *back* of the folder? As mentioned previously, Stanford University conducted a study that found that 87% of filed papers were never looked at again (as cited in Pollar, 1999). Every piece of paper put in the Temporary Trash Can is a piece of paper that is not anticipated to be needed ever again. This system holds onto them "just in case." For this reason, you need a system that takes *no time* to file. Putting the "Smith" letter in the back of the "S" file takes two seconds. Trying to keep the "S" file in alphabetical order, filing the letter between "Sk" and "Sn" would slow the process.

Should you need to retrieve an item from the *Temporary Trash Can*, you know the correct lettered file. Then, think approximately *what time of year* the item arrived. Items from the first of the year will be found toward the first of the folder. Anything that came towards the middle of the year will be found towards the middle of the folder. Within each file, therefore, papers are filed *chronologically* rather than *alphabetically*.

One of the summer-time repeating tasks is to purge the *Temporary Trash Can*. By that time, you will have a solid idea of what truly can be thrown away and what is potentially of lasting value. Stack the entire set on the desk, open the "A" folder, and look at each piece of paper for roughly one second. In that one second, make a decision to either "trash it" or "keep it forever." All of the "trash" items go in one stack. All of the "keep" items go face down in another stack. By the time you have finished the exercise, the "keep" pile will likely be surprisingly thin. Do not be surprised if the "trash" pile stands several feet tall.

At that point, take one file folder, label it "Correspondence [fill in year]," place the "keep" pile in the folder, and place the folder in your reference system. As for the other pile, shred sensitive items and then put it all in a large garbage bag. The *Temporary Trash Can* is now empty and ready for a new school year.

Where did the name for this tool originate? A reader of the first edition of this book liked the idea of a "holding tank" for items likely bound for the trash can and made reference to it as the *Temporary Trash Can*. The name has stuck ever since.

Off-Site Storage

Storage space is normally at a premium in offices and classrooms. Items that will seldom, if ever, be used should not be allowed to occupy prime real estate. The holiday decorations that will be used for three weeks out of the school year should not reside in a storage cabinet in the classroom while materials needed every day have no space. Neither should those seldom-needed items be stacked on top of cabinets extending to the ceiling if other options are available. None of us would allow our formal dining room at home to be cluttered with boxes sitting on top of the china cabinet. Nothing gives an area a cluttered look quicker than its perimeters being used for long-term storage.

Off-site storage removes those lesser-needed materials and allows more room for what will be used each day. Look for a partially empty closet and stake your claim on it. Anyone who has worked in education for very long will attest that making friends with the school custodian pays huge dividends. This person can likely point you to unused storage space in the school and help keep others from encroaching on "your turf."

Large plastic tubs are excellent for storing seasonal items in your off-site storage area. An orange tub with a black lid holds all of the Halloween decorations. Another tub holds Thanksgiving materials. A green tub with a red lid holds Christmas materials. When one season ends, replace all of the related items in the tub and pull the tub for the next season. You never have to hunt for, or find places to store, single items again.

Many organizations can solve problems of lack of storage by getting rid of old records. Your state most likely has a "records retention schedule" that dictates how many years each type of record should be stored. The same document will likely outline the procedure for destruction. Mark each box of records with the destroy date before moving it to off-site storage.

Figure 6.2 shows how your work area will look once you have established each of the areas where papers or other physical items will reside.

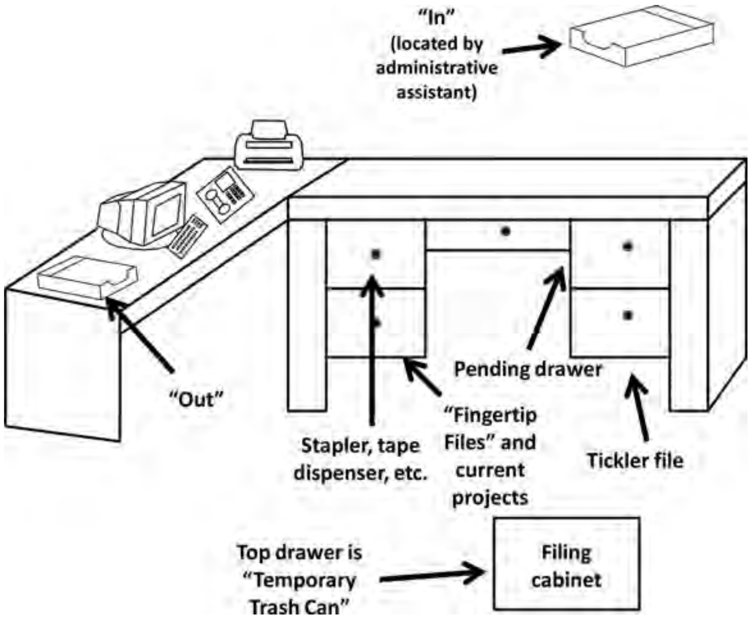

Figure 6.2 Work Area Setup

File It the Way You Find It

Making filing easy spells the difference between an office clear of clutter and one where piles of papers cover every flat surface. The *Temporary Trash Can* file provides an example of chronological filing. New items go behind old items.

The school leader will see other examples where chronological filing presents a huge time-saver. Disciplinary referrals provide one such example for the building-level administrator. Imagine a middle school assistant principal who is responsible for handling disciplinary referrals. After seeing the student and entering the information in the school administrative software, the assistant principal would likely file the paperwork *alphabetically*. After all, alphabetical filing is a system that seems comfortable. As the year progresses and the numbers of referrals have grown larger, filing each form takes more time. As a result, the tendency to put off the job of filing exists. Soon, a huge backlog of unfiled forms clutters the office.

The savvy assistant principal may later realize that whenever a student's disciplinary record needs to be accessed, it is always done on the *computer*.

No one needs to actually examine the *paper* form. From that day forward, the assistant principal begins filing those forms *chronologically*. At the end of the day, every disciplinary form that comes in that day is placed in the *back* of the stack. The job that had been a constant headache becomes a two-second-per-day routine.

The beginning of school is a time when a variety of papers are collected and then purged at the end of the year. Examples include the page of the student handbook where students and parents sign, indicating they have read the handbook. Imagine the school where those forms are filed in individual student folders. The same process is repeated with several other forms, such as one parents sign agreeing to pay for textbooks their children lose. Each homeroom teacher collects the form from his or her students. When all students have turned in a particular form, the teacher puts a rubber band around the stack and sends it to the office.

The office staff then spends considerable time taking the individual pieces of paper, organized by homeroom, and filing them in individual student folders. When the school year is over, the office staff then spends several days purging those same forms from all of the student folders.

Think how much time would be saved on both ends of the school year by filing those forms *the way they came in*—handbook acknowledgements in one folder, textbook agreements in one folder, etc. You will be able to add your own examples. Throw them in the correct folder as teachers submit them. Throw the folders away at the end of the year.

Summary: Paper Is Not the Enemy—Lack of a System Is

The "paperless office" is still an elusive dream. We have plenty of paper in our lives, and there is nothing wrong with that. When we cannot find what we need, or when the system is so cumbersome that we hesitate to use it, we might as well not have it. With your *Fingertip Files*, *Current Projects*, and *Reference Files*, together with their subcomponents, the *Temporary Trash Can* and *Bulk* area, you can find what you need and find it easily.

7 Where Do I Put It? . . . It's Digital

More like "Star Trek" or "Lost in Space"?

Our culture has trouble filing and finding paper after centuries of experience dealing with it. We should not be surprised to find many school leaders totally lost when attempting to file and retrieve the vast amount of *digital* information that arrives daily. In this chapter, we explore how to set up a parallel system for our digital material.

The Computer Desktop

Just as achieving a clean desktop is a by-product of good paper management, a clean computer desktop is a by-product of a good digital storage system. A common problem is a desktop filled with icons. Ask the user why all of those icons clutter the desktop, and be prepared for a two-part answer.

"I have everything on the desktop so I can find it," constitutes the first part. For most people, it's the dirty lie they tell themselves. After a while, it's hard to find *anything* on that cluttered desktop.

The second part of the answer, spoken in softer tone, is "I don't know where else to put it." That statement uncovers the real problem, failure to spend the time constructing a good system and making decisions about where items will go.

We can operate a very efficient digital filing system from only three folders: Documents, Current Projects, and Fingertip.

Documents

This folder has been called *Documents*, *Document Library*, or *My Documents*, depending on the platform and version of the operating system. It is the parallel of the metal filing cabinet that houses the reference files. These files have no action attached to them. They simply need to be organized so that material is easy to find.

To begin organizing the *Documents* folder, look at your paper filing system. Get the paper system pristine, and then create a *parallel* system on the computer. For example, if a science teacher was handed a good lesson plan on photosynthesis, the teacher would need to have a place in the filing cabinet for it. If the same teacher was given a PowerPoint presentation on photosynthesis, the teacher should have a place in the digital filing system to put that presentation.

While the folders in the Documents folder will vary from person to person, I recommend three folders for everyone. They are *.Temporary Trash Can*, *Memos & Letters*, and *Monthly Tickler*.

Temporary Trash Can

Chapter 6 presented a simple and effective way to deal with the papers that need no action and seem to be of no value, but for some reason, you hesitate to throw them away. We used one drawer, the very first one in our reference filing system. The same challenge exists with the digital documents we receive.

Inside the *Documents* folder, create a folder called *.Temporary Trash Can*. Notice the leading punctuation. The period just before the word "Temporary" causes this folder to sort to the top of the list.

Whenever you receive an email attachment or download a digital document you feel will be of no value, but hesitate to delete it at the moment, you have a solution. Drag it to the *.Temporary Trash Can*.

In Chapter 6, we purged the Temporary Trash Can each summer. In fact, we scheduled a repeating task on the task list as a reminder. Do the same with this digital counterpart. Because of the ease of purging, you may wish to perform this task frequently, perhaps monthly.

Memos and Letters

After composing a memo or letter, resist the temptation to save a paper copy. Instead, electronically file any type of correspondence, and do so in the folder called *Memos & Letters*. The key to finding these documents later is to develop a system for naming files.

My preference is to name files with the last name of the recipient, followed by a hyphen, followed by several words that describe the subject matter of the document. Likewise, when receiving a document in digital fashion, I name the file with the sender's last name, a hyphen, and a few words descriptive of the subject matter.

For example, if writing to someone asking for their thoughts on playground equipment, there is no need to wonder weeks later when retrieving it whether the letter was named "Playground Letter," "Thoughts," or "New Playground." The document is going to start with the last name of the person, a hyphen, and several words related to the playground. Furthermore, it is going to be in *Memos & Letters*, which is located in the *Documents* folder.

Memos & Letters can serve as a good miscellaneous folder. With email, the *Just in Case* folder discussed in Chapter 4 serves as the place for random messages being saved for documentation purposes. In the same fashion, *Memos & Letters* serves as a catch-all for email attachments and other digital documents being saved primarily because of the person to whom we sent the information or from whom we received it.

Monthly Tickler

I recommend everyone have in Documents a folder called *Monthly Tickler*. Education is a cyclic business. We find ourselves engaged in the same projects at the same time each year. In many cases, a project involves updating the forms and other paperwork that go with it.

How nice would it be if all of the routine paperwork that we need to update during a given month was located in one place? *Monthly Tickler* is designed for just this function.

Inside *Monthly Tickler* are 12 folders labeled with the 12 months of the year. Each file contains the documents that need to be updated during that month. For example, a secondary principal might have the subject selection forms in the "March" folder. At the beginning of March, seeing the contents of that folder serves as a reminder to update the forms with the date for the next school year, the addition of new courses, and the deletion of courses that will no longer be offered. Opening one of the monthly tickler folders serves as the trigger to examine, update, and print each item in there.

A teacher's August folder might contain the "welcome to my class" letter and an outline of the presentation for parents during Open House. On August 1, the teacher opens the August folder. Seeing the welcome back letter and outline serves as a reminder to update and print these two documents.

An annual holiday production may be part of a teacher's activities each December. An introductory letter regarding that production might be found in the October folder. A draft of last year's program could be found in the November folder. A letter inviting the superintendent to attend the production and a request for the media to cover the event might be found in the November or December folder. Opening one of the monthly tickler folders serves as the trigger to examine, update, and print each item there.

As one example, in the heat of the busy holiday season, how easy would it be to simply forget to drop the superintendent a letter of invitation? How embarrassing would it be for the teacher when the superintendent is asked about his absence from the program and replies that nobody told him anything about it? Having last year's invitation letter in the November file serves as the trigger to send this year's letter. A two-second date change and execution of the print command is all that is necessary to take care of the superintendent's invitation. Hurt feelings and social slights are not necessarily the result of not caring. Instead, they can and do result from people who are caring, yet overwhelmed, because they lack systems for handling the details.

What keeps you from forgetting to check this *Monthly Tickler*? Use the techniques you learned in Chapter 3. Create a new task on your digital task list. Call that task, "Check Monthly Tickler on computer." Set a start and due date. Set the repeating pattern for "Monthly." Once each month, you will be reminded to go to the Monthly Tickler and handle each item.

Fingertip Files

Most people will find that 5% of their files account for 95% of the usage. Having those files where they are easy to access is a time-saver paying dividends on a daily basis. Here are some examples of such files:

- Letterhead.
- Memo Template.
- Master Schedule.

- Purchase Order Form.
- Financial Spreadsheet.
- Expense Form.
- Meeting Planner.

In Chapter 6, we provided a place for those commonly accessed items that are paper-based. We called them *Fingertip Files*. We need a digital counterpart. On the computer desktop, create a folder called *Fingertip* and place in it those few files that receive constant use. The time-saving aspect is that these commonly accessed documents are in one folder rather than scattered among multiple layers of folders.

Current Projects

In Chapter 6, we saw that projects generate supporting paperwork, and we need a place for that paperwork. Because we are working on those projects regularly, we want the supporting paperwork close at hand. Finally, simply looking at the drawer that houses the *Current Projects* files provides a reminder of what is "on our plate."

The same concept holds true in the digital world. One folder on the desktop called *Current Projects* is the place to house this information. Inside that folder are folders corresponding to each project.

In Chapter 5, we met Andy and examined how he is able to keep multiple projects moving forward. A single entry in the digital task list is the key. The note section of that task includes all additional information. It also points to where supporting information may be found. Figure 7.1 provides an example.

Looking at this task reveals the outcome of this project is "Classroom management article has been submitted." The next step toward moving this project forward is to ask Mary to read the draft and provide feedback. A friend named "Charles" has been successful in getting several articles published, so contacting Charles will become another next step. Including it in the note section means the idea will not be forgotten.

As the project unfolds, Andy has gathered information related to policies of several publications. Some of the information is on pages torn from magazines. Andy creates a folder, labels it "Classroom Management Article," and put it with his *Current Projects* files. He also has digital documents downloaded from

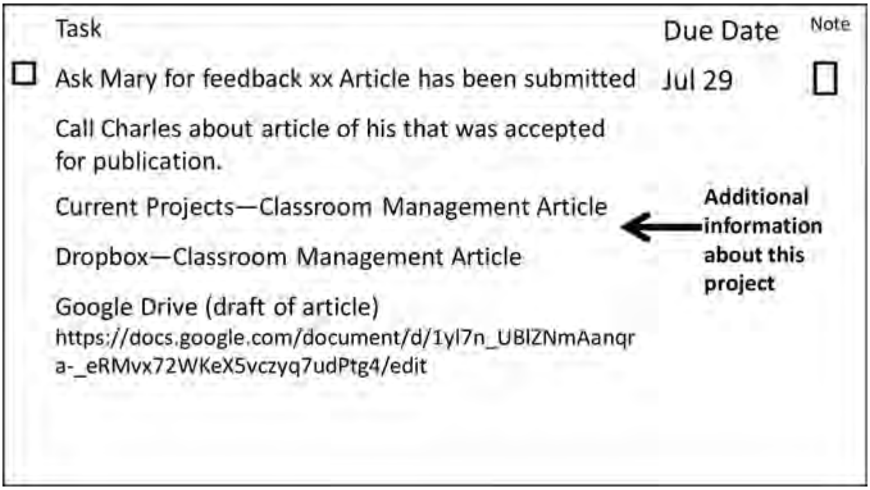

Figure 7.1 Task Note Points to Supporting Documentation

several websites. He creates a digital folder, labels it "Classroom Management Article" and drags it to his *Current Projects* folder on the computer desktop. In this example, he is using Dropbox to house those projects.

Andy has chosen to write the draft of the article in Google Drive. In the note section of this task, Andy includes the link to the draft.

The glue that holds the pieces together is the notation Andy adds to the task's note section:

- Current Projects—Classroom Management Article.
- Dropbox—Classroom Management Article.
- Google Drive—Draft of article (with link to the article).

Andy could also have supporting notes for this project in Evernote. If so, he would copy the link to this note and include it in the note section of the task. Whenever he works on the article, he is reminded about the supporting material and its location.

"Cloud" Storage

The desktop computer used to be the central repository for our digital data. The rise of the laptop computer offered the ability to take data anywhere and make changes to that data from anywhere. The advent of the flash drive, with its relatively large storage capacity, opened other opportunities. The tech-savvy person who worked from different computers saved what we would call *Fingertip Files* and *Current Projects* on a flash drive and carried that flash drive on a lanyard around the neck. This person could now access and change those files from any computer by inserting the flash drive.

"The cloud" has replaced its predecessors as that central repository for data. We want the ability to access our data from anywhere and on any device, be it a computer, laptop, tablet, phone, or whatever device may become common after this book goes to press. Storing our data in the cloud provides that ability.

If you have sufficient cloud storage available, by all means create three folders within it: *Documents*, *Current Projects*, and *Fingertip*. Store all of your digital data there. It is now accessible from anywhere.

Using Multiple Cloud Services

If you do not have sufficient cloud storage for all of your data, consider splitting it among several different services. For example, I started with a Dropbox account that offered two gigabytes of free storage. While that amount was not nearly enough for housing all of my data, it was enough to house my *Current Projects*. Having *Current Projects* stored in the cloud was the first priority for two reasons. Those documents were the ones I was most likely to be working on, referring to, and showing other people from different computers. Secondly, cloud storage offers instant back-up, regardless of whether I was using my work computer, home computer, or laptop computer.

Later, I acquired a Microsoft OneDrive account. It afforded me enough storage to serve as my *Documents* folder. Using these two services, one that served as the *Documents* folder and the other as *Current Projects*, all of this information became available to me from each of my computers, in addition to being able to log into it from anywhere.

I wanted a third folder, *Fingertip Files*, on the desktop. Because these files are so commonly used, I also wanted them available from anywhere. To accomplish both objectives, here are the steps I took:

1. Drag the *Fingertip Files* folder into Dropbox.
2. Create a shortcut to the *Fingertip Files* folder.
3. Drag the shortcut to the Desktop.

Google Drive

If you use Google Drive, create a parallel system to what we have discussed. Google Drive will serve as the *Documents* folder. Inside it, create a *Memos & Letters* folder, a *Monthly Tickler* folder, and parallels for all of the others you have in your *Documents* folder. If you create or receive a document in Word, Excel, or PowerPoint, for example, you will have a place to put it. If someone shares a Google Drive document, sheet, or slides, you will have a place to put it.

In addition, create these three folders inside Google Drive:

- .Current Projects.
- .Fingertip.
- .Temporary Trash Can.

Notice the punctuation before the first three items. These folders will sort to the top of the list.

Backing-Up Your Files

"How many of you have a good system for backing up your files?" When this question is asked of a typical group of professionals, few if any hands are raised. When defining what is meant by a "good system" of backing-up, it must be one that is *easy enough you will actually do it*.

Before discussing a back-up system, realize basically two types of hard drives exist:

1. Those that have crashed.
2. Those that will crash.

If you have not experienced a hard-drive crash yet, chances are that you will. When that happens, it needs to be an inconvenience rather than a loss of significant data.

To put the importance of backing-up data in perspective, examine what would happen if the hard drive crashed today. With one phone call, you could probably summon the help of someone with the technical skills to get the computer up and going again. The job would entail purchasing and installing a new hard drive. This part is relatively inexpensive. Your tech-savvy friend could reinstall the system software and other programs. You can now resume using your computer just as you had before.

But can you? Where are all of your documents? Without a good back-up system, your documents are lost along with your hard drive. Without a good back-up system, consider what will be *lost forever*:

1. Student Handbook—Do you really want to be faced with having to re-key that entire document?
2. Faculty Handbook—Re-keying that document will be a major time commitment.
3. Beginning-of-year letter, grading information, and outline for the year—Do you really want to be faced with having to re-key these entire documents?
4. The entire whole packet related to that big field trip you sponsor every year—Gone is the introductory letter, the release forms, the itinerary, the lesson plans preparing the students for the trip and providing follow-up activities after the trip. All of the well-crafted material that you had honed over the years is now history.
5. Your term paper—You have been working on that paper for your graduate class every night for the last three weeks, not to mention spending all of last weekend on it. The paper is due the day after tomorrow. Imagine the feeling of panic at having to re-create the paper from scratch.

With so much importance resting on our data, why do more people not have a system for protecting it from disaster? For the vast majority, the answer is easy. *Nobody ever showed them how*. Even if one tried to do a back-up, what exactly would need to be copied? The computer has hundreds of thousands of files. Where would one even begin?

Many school districts have systems in place where teachers store documents to a shared drive and a technology specialist is charged with backing up all data each evening. Such a system relieves the individual of this duty. But, what about the home computer or laptop that may not be connected to this shared drive? The responsibility for protecting this data rests squarely with the individual.

Storing data in a cloud-based service provides a quasi-back-up. Should a hard drive fail, all of the data is safe. Install a new hard drive, log into the cloud-based account, download the desktop software, and all of your data is back. However, none of us should rely solely on one of the services as the only back-up. True online back-up services are available.

The other option is an external hard drive. Specifics will vary depending on the platform and operating system used on your computer. The general principle is that you will be able to set up an automatic back-up. When you plug the external hard drive into your computer, the process will happen automatically.

As this chapter concludes, these points will be true about your computer:

1. You can file easily and logically.
2. You can find it later.
3. You are not going to lose it all if the hard drive crashes.

Digital storage is cheap and requires virtually no physical space. We have the luxury of having an immense amount of information accessible within seconds. That information, however, is only as valuable as our knowledge of what we have and our ability to find it. Three folders, front-and-center on your desktop, provide a well-organized reference library, a collection of all that is "on your plate," and a set of your most currently used files.

Summary: It's Only of Value if You Can Find It Quickly

Our digital storage systems provide an unlimited capacity to store information, as well as unlimited places to lose it. When we don't know what we have, or when we cannot find it, we might as well not have it. Invest a little time in a filing system that works the same, regardless of the medium. That investment pays dividends every day.

8 Evernote Made Easy

Elephants never forget.

If the age in which we live is dubbed the "Information Age," then our ability to store information, retrieve it, and do both from anywhere with any device becomes a major theme in our efforts to be productive. In a pencil-and-paper environment, a paper planner has been the centerpiece of an effective organizational system, the *Signature Tool* to which we refer in Chapter 2. That book houses a calendar, space on each page for a task list, an address book, and a section in the back for reference information. In the digital world, the signature tool takes the form of a five-component software suite. It parallels the paper planner, and adds a fifth element:

1. Calendar—The places we must be.
2. Task list—The things we must do.
3. Contacts—The people with whom we connect.
4. Notes—The reference information we need to have at hand.
5. Email—The hub of communication.

To this point, we have discussed all elements except the fourth—notes. Evernote is the place where we will keep the reference information that we want to have at hand, and be able to edit, from anywhere. This book has not endorsed a particular piece of software. Evernote will be the one exception.

What sort of information might we include in our digital notes? Think about where you would find each of the following pieces of information in your reference system:

- Hotel rewards numbers?
- Account number for vendors?
- The code for the copying machine?
- Information about your automobile, including the vehicle information number, information about the purchase and warranty, and a record of major repairs?
- A checklist of the steps involved in hiring a teacher in your school district?
- A checklist of steps involved in teacher evaluation?
- Gift ideas for family members?
- The digital notes related to a current project?
- The notes a principal takes while visiting a classroom?
- The lesson plans a teacher prepares?

For many people, the answers include sticky notes lining the computer monitor, folded pieces of paper in wallets and purses, papers filed in hard-to-access thick file folders, and a variety of paper-based forms and booklets.

To take our need for making retrieving notes a step further, let's return to the paper journal discussed in Chapter 4. After reading about the use of a journal, you may wonder about a good digital equivalent for taking notes during a phone call, meeting, or workshop. Principals look for an alternative to the mountain of paper observation forms. Teachers look for user-friendly digital alternatives to the lesson plan book. Again, Evernote provides a solution for these practical, everyday challenges.

A Day in the Life of the Evernote User

The best way to understand Evernote is to see it in action. Let's shadow Linda, a middle school principal, to see how she uses Evernote throughout her day.

The Phone Call

Communication with stakeholders begins early as Linda's administrative assistant forwards a phone call from a parent. Linda's practice had been to take notes from such calls in her paper journal. Now, she uses Evernote. She opens the program each day as soon as her computer boots. As she answers the phone, Linda creates a new note. Because Evernote automatically records the date and time of the note's creation, Linda need not supply that information.

During the conversation, Linda takes notes. Several "to do" items occur to her, and so she enters them as part of her notes, but marks them in such a way that these tasks stand out from the rest of the information. Her shorthand is to precede any task with a checkbox. Evernote automatically saves the note in her Evernote *.Inbox*.

When the conversation ends, Linda can move immediately to the next item—classroom walkthroughs.

Classroom Visits

Linda spends time in classrooms each day. In some classes, Linda works from a checklist. In others, she takes freehand notes about what she sees. Sometimes, she takes her laptop into the classroom. When her visits are short, she tends to use her tablet, because of its portability. At times, when she has a few unexpected moments on her hands and is already out in the building, she pulls out her mobile phone as she walks into a classroom. Because she has Evernote installed on all of her devices, she can add notes on any of them. Because Evernote syncs across all of her devices, she is able to retrieve her notes from any device.

The first stop is the choral room where the 7th grade girls' chorus is preparing for their fall concert. Linda creates a new note. Evernote supplies the date and time. Linda titles the note with the name of the teacher. She starts to key her thoughts into the note she created.

Linda notices several girls on the back row slumped down in their chairs, posture that would negatively impact good vocal tone quality. Feeling that "a picture is worth a thousand words," Linda taps one icon on the tablet and snaps a picture with the tablet's camera. Because she is taking a picture from within Evernote, the picture is stored as part of that same note.

Linda is also bothered by a vocal tick. The teacher begins almost every sentence with "You know." Linda thinks, "I am sure she has no idea she has developed this habit. If she could only hear what I am hearing, she would surely correct this practice." She taps another icon from within Evernote, and the device's voice recorder begins recording the teacher's instructions. Because the recording is happening within Evernote, the results are saved as part of the note.

When Linda is ready to move on to another class, she saves the note. It goes to the *.Inbox* in Evernote.

The next stop is a math class. At a recent departmental meeting, Linda and the math teachers structured a checklist of items she would be looking for during walkthroughs over the next several months. Linda stored that checklist in an Evernote notebook called "Checklists." Linda uses a menu item to copy the note and selects *.Inbox* as the destination. She titles the note with the name of the teacher.

During her time in the classroom, she checks the boxes beside the items she observes. Linda is able to add comments anywhere on the form. As with the visit to the choral class, Linda can add photographs or audio recordings to her note. Before leaving the classroom, she saves the note. Just like the other notes she has taken today, this note is stored in *.Inbox*.

Vandals Strike Again

On the way back to the office, one of the custodians informs Linda he has found where vandals have broken into a storage area in the rear of the school, spray-painted a symbol on one wall, and turned over two bookshelves.

Linda calls the police to file a report. As she waits for their arrival, she creates a new note in Evernote on her tablet. She titles it "Storage Room Vandalism" and taps an icon, bringing up the camera on her tablet. She takes several pictures of the vandalism.

When the police arrive, she keys the names of the officers into the note. Together, they think through the next steps that will help them solve the case. Linda taps an icon in Evernote and dictates her thoughts. Evernote turns her speech into text.

When the police leave, Linda calls her superintendent. He does not answer, so she leaves him a voicemail message and says that she will email details. Linda taps the note she took regarding the vandalism and, from the menu, selects the option to share the note via email. She chooses her superintendent as the recipient.

The Grant Application

The day is still young, yet has already seen a blend of the both planned activities and unexpected ones. Linda takes a few moments on her computer to work through email that has arrived. She handles several with quick responses. Several others represent tasks that will take some time. Linda forwards those to her task list as she works her way back to an empty email inbox.

One of the emails relates to a grant on which Linda is currently working. Linda had already created a notebook in Evernote for the grant and has been using it to keep all of the random information about this project in one place. This email contains several ideas that will be useful as she writes the finished product. Linda clicks the "forward" command in her email program, and forwards the email to a special address Evernote has supplied her with. This email now resides in her Evernote *.Inbox* notebook within Evernote.

Another email contains a link to an outstanding article on writing grants. Linda decides she would like to save that article. In the "old days," she would have been reading that article from a magazine. She would have taken scissors and "clipped" the article. Then, she would have hole-punched the article and inserted it into a notebook.

In Evernote, Linda does the digital equivalent. While viewing this article, she clicks an icon to open the Evernote "Web Clipper." She clicks "OK," and the entire body of the article is inserted into a new note in the Evernote *.Inbox*.

Meetings, Meetings

Next on the agenda is a meeting of principals at the central office. Linda's paper journal had always served her well, but now she uses Evernote instead. As the meeting begins, Linda creates a new note, titles it "Principals Meeting" and takes notes as needed. Like most of these meetings, she inherits "to dos." She adds those to her notes, marking each task with a checkbox.

Random Papers

Linda manages to escape her meeting totally free of papers. On her way out the door, one of the supervisors hands her the agenda for the next Board of Education meeting. Not wanting to keep up with this loose piece of paper, she opens Evernote on her mobile phone, and scans the document.

When the Dust Settles

Your system needs to be as fast as the environment in which you operate. Linda's day is typical of school leaders. She needed to be able to move from one activity to the next and be fully present in the moment for each of them. Her system, using Evernote, allowed her to trap the information, make notes of tasks associated with any of it, and store it all in one place—the Evernote *.Inbox*.

At some point the dust settles, and many days that time happens in the afternoon after buses roll. Rather than trying to mentally walk through the day and try to remember what has transpired and what she needs to do about it, Linda looks in one place—the Evernote *.Inbox*.

Today, here is what Linda sees:

1. Notes from the parent phone call.
2. Choral music walkthrough.
3. Math walkthrough.
4. Pictures and notes related to the vandalism.
5. Email about the grant.
6. Internet article on grant writing.
7. Notes from Principals Meeting.
8. Scan of the Board of Education agenda.

Linda can now look over the notes she has taken. Some of her notes were taken quickly. She now has the opportunity to make changes as needed. She is also looking at those notes with a single question in mind: "What do I need to *do* about the notes I have taken?" The checkboxes she has placed before certain items during the day gives her a big head start. With time to reflect on her notes, other tasks may occur to her, which she adds to her notes.

Ultimately, the tasks that Linda put in her notes need to wind up on her task list. I presently use a service that identifies any items marked in Evernote as tasks, and it automatically copies them to my digital task list. That service also inserts a link into the note section of each task. Clicking the link takes me to the corresponding note in Evernote. Because digital services change so often, I do not discuss the name of the service or further details here. My blog (FrankBuck.org) provides that type of information.

"In" Becomes "Empty"

The goal with the email Inbox is to get it empty every day. The same is true with Evernote. The notebook called *.Inbox* is a place to trap everything that comes in during the day. It allows you to decide what needs to be done about each item. After making the decisions, you will move each item to the appropriate notebook, where the note now becomes reference information.

The Case for Evernote

Linda's story demonstrates a need for Evernote. When Linda walked into a classroom, she captured text, audio, and photographs within the same note. How would you have accomplished this same task without Evernote?

Certainly, our mobile devices have the ability to capture photographs, record audio, and take notes. Those photographs, however, are stored with other photographs. The audio is stored with other audio notes. The text is stored with other text notes. When you return to your computer, you must first remember that you trapped these various bits of information, somehow transfer them to your computer, create a folder for them, and drag each piece of information to that folder. Then, and only then, are all parts of that classroom visit housed in the same place.

Evernote combines the photograph, audio, and text into the same note, syncs it across all devices, and stores the results in the *.Inbox* notebook, along with everything else that you add during the day.

The popularity of mobile devices provides an even more compelling case for using Evernote to keep reference information. Computers have well-developed folder structures, allowing the user flexibility in where information is stored. Mobile devices, at least at this point, lack that flexibility. Evernote's system of notebooks provides the much-needed structure for mobile devices.

A second point has to do with the ability to edit documents from mobile devices. Many services give users the ability to download documents to their mobile devices. Editing those documents and having those changes sync back to the originals becomes questionable. The next time the user accesses that document, an additional copy of the document downloads to the mobile device. With Evernote, content can be created and edited from any device. Changes sync across all devices. The more one depends on a mobile device for reference information, the more important Evernote becomes.

Getting Started

The steps to getting up and going on Evernote are as follows:

1. Create an account at http://Evernote.com.
2. Download, install, and log into the Evernote "Desktop Client" on each of your computers (work computer, home computer, laptop computer, etc.).
3. Install the Evernote "Web Clipper" on each of your computers.
4. Install and log into the Evernote app on each of your mobile devices.
5. Create several notebooks, using the remainder of this chapter as a guide.
6. Start creating notes.

The placement of menus changes over time. The Internet is filled with short tutorials and videos showing the latest version of Evernote on every device. Therefore, our discussion of Evernote centers on a system for use rather than the mechanics of operation.

What Notebooks Do You Need?

Our computers use the metaphor of the file folder as its organizational scheme. Evernote uses the concept of "notebooks" to organize information. For the new user, knowing what notebooks are needed may be confusing.

Inbox

Of all of the notebooks, *.Inbox* is the most important. It is like the mailbox in front of your house, Chapter 1's *In* for newly arriving papers, or your email inbox. It is the place to trap information *now* and decide what needs to be done about it and where it needs to be filed *later*.

The *.Inbox* is not something that comes as part of Evernote. Instead, it is a notebook you will create, name, and designate as the "default notebook."

Notice the punctuation, a period, before the word "Inbox." Evernote alphabetizes the notebooks, and by placing a punctuation mark as the first character, this notebook sorts to the top of the list.

Like Linda, you will add a variety of information to Evernote during the day. When the dust settles, you make decisions about what needs to be done, and then move each note to the appropriate notebook. At the end of the day, *.Inbox* should be empty. If needed, you could include on your task list a daily repeating task reminding you to examine and empty the Evernote *.Inbox*.

Miscellaneous

A notebook called *Miscellaneous* provides a place for those notes you don't know where to file. Your system of notebooks will evolve. Once that system matures, *Miscellaneous* will likely be empty. Until then, it provides a good catch-all.

Personal Information

The lives of busy people are filled with bits of information, and keeping up with it all can challenge even the most highly organized person. I highly recommend the third notebook you create be titled *Personal Information*. Inside mine are notes labeled *A–C*, *D–F*, *G–L*, etc. The *A–C* note, for example, provides an alphabetical listing of all account numbers, codes, membership numbers, and other random bits of information for items beginning with the letters A through C.

When it comes time to supply a membership number or login information for a website, I do not consult a sticky note and re-key the information into a website. Instead, a simple copy/paste from Evernote works faster and eliminates mistakes. If keeping any sort of sensitive information in Evernote causes alarm, realize Evernote allows the user the ability to highlight and encrypt any bit of information. Even if someone else gains access to the Evernote account, encrypted information appears only as a series of asterisks until the proper password is entered.

My Personal Information notebook includes the following other notes:

- Bio—Think about how many times someone needs to introduce you and needs a script to follow. I can tap this note and hand the person my phone.
- Contact QR Code—If someone wants to add me to their Contacts, all they have to do is scan this QR code. It includes all of the information I would like that person to have.
- Directions to my house—Even though giving someone a street address is usually enough, some people like to know about the landmarks they will pass.

- Family Tree—Determining who is related to whom and how can get tricky. Once you get it figured out, writing it down keeps you from having to rethink it later. This note in your *Personal Information* notebook within Evernote is the perfect place to store it.
- Passport—This scanned copy of my passport's identification page shows my picture, passport number, and other important information.

Journal

Chapter 4 explained a system for keeping notes from phone calls, meetings, and other verbal communication in a single paper journal, organized chronologically. For those who wish to record this type of information digitally, Evernote is the answer.

Every new phone call is a new note. Evernote automatically provides a date-and-time stamp. Every one-on-one conference is a new note. Every new meeting is a new note.

As with the paper journal in Chapter 4, the concept of taking notes and then reviewing them later in the day is critical. Notes are sometimes taken in haste. Some of the needed follow-up is not evident in the heat of the moment. The technique for sealing the cracks is to review the notes later in the day with an eye for answering the question, "What do I need to *do* about what I have written?"

With Evernote, we have the same opportunity. All new notes go to the notebook called *.Inbox*. The user has only one place to look. After editing the notes and hammering out the tasks, move those notes from *.Inbox* to *Journal*.

If you are considering using Evernote to take notes during phone calls, meetings, and one-on-one conferences, I suggest you think carefully through two points:

1. Will you be able to take digital notes and also be fully present in the conversation? Or, will the concentration needed to enter text into the device divert so much of your attention that you cannot effectively participate in the conversation?
2. How socially acceptable will your digital note-taking be? Will the other party hear the non-stop clacking of keys throughout the phone conversation? Will the parent with whom you are holding a conference be paying more attention to the technology you are using than the conversation in which the two of you are engaged?

One possible strategy is to take notes on paper and then transcribe them into Evernote later in the day. Use Evernote's voice dictation capability to read your handwritten notes into Evernote and watch the software turn voice into text. As you dictate, you are also "cleaning up" your notes, omitting the unimportant, and elaborating on other areas that needed clarification.

Checklists

As a teacher plans a field trip, a "Field Trip Checklist," carefully honed over time, lists every step so that nothing is left undone. For the administrative assistant, an "End of Grading Period Checklist" ensures that every detail is handled from checking for missing grades to sending the honor roll to the local newspaper. For the principal, the "Hire a Teacher Checklist" covers each step from posting the vacancy to providing the newly hired teacher with keys, logins, codes, and a labeled mailbox in the faculty workroom.

Other checklists might cover the following routines:

- Preparing for a substitute teacher.
- Preparing for a parent conference.
- Taking the marching band to a football game.
- Planning for a guest speaker.
- Referral to the Student Support Team or special education.
- Setting up a computer (everything from unboxing to the installation of every program).
- Chairing an accreditation review team.
- Handling the "Teacher of the Year" program.
- Packing list for a trip.

Evernote provides the perfect place for housing checklists. Create a notebook called *Checklists* and create a note for each checklist. When one of these checklists needs to be set in motion, email it from Evernote to the digital task list. The appearance of the checklist on the task list serves as the trigger for you to act and keeps the details from falling through the cracks.

Classroom Observations

Linda used Evernote to conduct two classroom walkthroughs. You saw two different techniques in her two visits. When she visited the choral class, she created a new note and made comments. When she visited the math class, she made a copy of an existing note—a checklist for what to look for during a math lesson. Figure 8.1 shows how that note may appear.

Regardless of whether Linda visits one class or 10, the procedure remains the same. Each note goes to *.Inbox*. Later in the day, she handles all

❑ Objective/Essential Question Displayed?
Major Teachers Activities:
❑ Using Differentiated Instruction
❑ Making Connections to Prior Learning
❑ Circulating in the Classroom
❑ Modeling
❑ Providing Opportunities for Guided Practice
❑ Providing Opportunities for Independent Practice
Engages Students in Meaningful Interactions:
❑ Utilizing Technology
❑ Providing Effective Feedback
❑ Using Flexible Groups or Centers
❑ Assessing Student Learning
Resources Being Used:
❑ Interactive White Board
❑ Student Technology Use
❑ Textbook
❑ Worksheets
Number of Students Off-Task:
Overall Comments:

Figure 8.1 Classroom Observation Checklist

.*Inbox* items and edits them as needed. Then, she asks one question: "What do I need to *do* about what I have written?"

If Linda wants to give a teacher written feedback from the observation, Evernote gives her the ability to email the note to that teacher. When she has taken the needed action on one of these notes, it then becomes reference information, and Linda will move it out of .*Inbox* to another notebook. She selects the one she named *Classroom Observations*. Linda will house every observation she conducts in the same notebook. She titles each with the teacher's name. Evernote date-and-time stamps each one. Linda can search her *Classroom Observation* notebook for a teacher's name and see every note for that teacher.

Stacks, Notebooks, and Tags

Paper filing systems offer some level of hierarchy. We have the capability to devote different filing cabinets to different purposes. Within any filing cabinet, each drawer can be assigned to a specific topic. Within each drawer, dividers can offer another level, and the folder provides the final level of hierarchy.

Computers allow the user to nest folders within other folders, allowing a hierarchy many levels deep. With Evernote, we already know about notes being organized into "notebooks." What about further levels of hierarchy?

Stacks

Think back to your college days. You had a notebook for your history class, another for the general science class, another for the foreign language class, etc. What would you have if you placed all of these notebooks one on top of the other? The answer is "a stack." In Evernote, that's exactly what you have. A *stack* is a group of notebooks.

Linda is strong in the area of curriculum. She often clips articles from the Internet and stores them in Evernote. She is an avid reader of books related to her curriculum and uses Evernote to take notes from them. She learns new ideas about curriculum at workshops and stores those ideas in Evernote.

Linda has created a notebook in Evernote for each subject area. She has also created curriculum-related notebooks that transcend subject areas, such as "Assessment" and "Brain Research." Linda wants some way to gather all of those notebooks related to curriculum and group them together. The concept of *Stacks* is the answer. On her computer, she drags one notebook on top of another. Evernote creates the stack and prompts her to name it. She adds more notebooks by dragging them to the existing stack.

Tags

The use of the *Tag* is an area of debate in the Evernote community. In my mind, tags provide a further level of division within a notebook. For example, Linda's *Classroom Observations* notebook is teeming with notes collected during the year. When it comes time to compose her end-of-year evaluations, she can easily pull the notes for a single teacher by searching the *Classroom Observations* notebook for that teacher's name.

Linda would like to be able to view all of the visits for that teacher that were particularly good and then view all of the lessons that were not so good. In Evernote, she creates five "tags": *Excellent*, *Good*, *Average*, *Needs Improvement*, and *Unsatisfactory*. When Linda reviews the notes taken during the day, she adds the appropriate tag to describe the overall effectiveness of the teaching she observed. In Evernote, as Linda starts to assign a tag to a note, suggestions of tags already used will appear. With just a couple of keystrokes, Linda will be able to tag the lesson.

Later in the year, if Linda wants to see all of the lessons taught by Nancy Smith that she described as *Excellent*, she searches Evernote for "Nancy Smith" and filter the search to the *Classroom Observation* notebook and *Excellent* tag. She is now looking at all of the visits to Nancy Smith's class where the observation was rated *Excellent*. Linda could now change the filter to search for the *Good*, *Average*, *Needs Improvement*, and *Unsatisfactory* visits to gain a good perspective of Nancy Smith's overall performance.

Linda could search the *Classroom Observations* notebook for all notes tagged as *Excellent* and see all of the visits, regardless of teacher, that represented top-notch teaching. Searching that same notebook for *Unsatisfactory* gives an overall view of the weakest teaching Linda observed. Each note is titled with the name of the teacher, includes the date and time, and displays the notes, photographs, and audio notes Linda took while in that classroom.

Returning to Linda's Day: Lesson Plans in Evernote

After school, Linda talks with Nancy Smith about a lesson observed today. Nancy has heard about Evernote, seen Linda use it during classroom visits, and wonders if she could use Evernote as a tool to house lesson plans.

Teachers need to have their lesson plans available from anywhere. Once upon a time, having those plans from anywhere meant using a lesson plan book and taking it to and from school each day. Today, lesson plans tend to be housed digitally and will be accessed digitally. Linda and Nancy brainstorm all of the different environments from which a teacher might plan lessons or need to access lesson plans. They quickly agreed that a teacher needs to have lesson plans available from all of these places:

- Computer on the teacher's desk.
- Laptop computer whose image is being projected on the classroom's interactive whiteboard.
- Teacher's home computer.
- Teacher's personal laptop computer.
- Teacher's tablet.
- Teacher's mobile phone.
- Public computer.

Linda suggests Evernote as the answer. Together, she and Nancy create an Evernote account on Nancy's classroom computer. They download the desktop client and web clipper. They then use the following steps to create a skeleton for Nancy's lesson plans:

1. Create a new notebook for each course.
2. Drag one of the notebooks in the list on top of another to create a "stack." Name the stack *Lesson Plans*.
3. Drag the remaining notebook into the stack. All of the notebooks housing lesson plans are now located together.
4. In each notebook, create a note for each week. Name the notes "Algebra I Week 1," "Algebra I Week 2," etc.

5. Each note represents a week of lesson plans for that subject. Add a "tag" for each note to designate which week of the school year it will be needed. The note for "Algebra I Week 1" would be located in the "Algebra I" notebook and have a tag of "Week 1." Clicking on the "Algebra I" notebook would bring up all lesson plans for that subject. Searching tags for "Week 1" would bring up the lesson plans for all subjects being taught during that week.
6. "Share" each of the notebooks in the Lesson Plan stack with the administrator. At present, right-clicking on the name of the notebook will allow you to add the email of a person with whom you want to share the notebook. This step negates the need to "turn in" lesson plans. The administrator has the ability to see lesson plans from any device as they are being created.

Nancy likes the format she has used in her paper lesson plan book and wants to duplicate it within Evernote. Figure 8.2 shows what she would like to see.

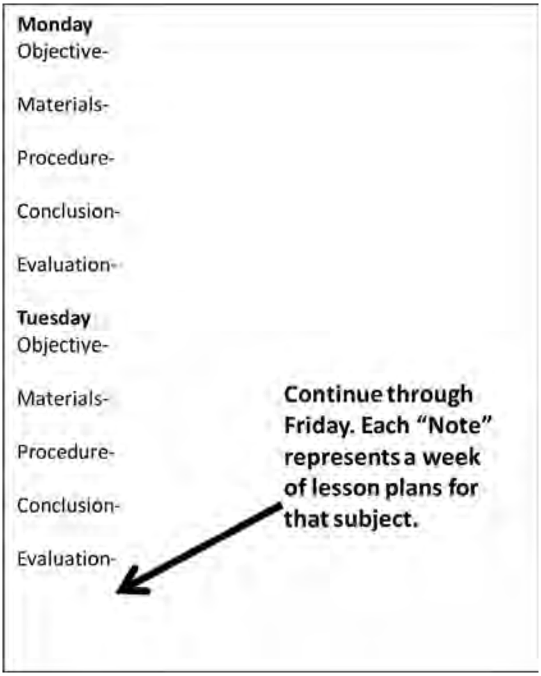

Figure 8.2 Lesson Plan Format in Evernote

Nancy creates a new note and keys into it this lesson plan format. She highlights and copies all of the text in that note and begins the process of pasting it into all of the other notes.

Nancy now has a skeleton for her entire year's plans. She can now plan her lessons from any of her devices, or even from a public computer. She can add text, hyperlinks, tables, and a variety of formatting. Each year, rather than reinvent the wheel, she can modify and build on the lesson plans from the year before.

Designing Your Own System

Over time, you will create a notebook structure that works for you. Look at both your current paper filing system and the digital filing system on your computer's hard drive. If you have friends who are Evernote users, look at the notebook structures they have created to jump-start your own ideas. Most importantly, dive in and start using Evernote.

Consistency Across Formats

In Chapter 6, we learned about classifying paper files as *Reference Files*, *Current Projects*, and *Fingertip Files*. In Chapter 7, we established three folders on the desktop, paralleling the paper format.

In Evernote, create a stack called */Current Projects*. The punctuation will cause that stack to sort almost to the top of the list. In fact, it will rest just below *.Inbox*. Just as you have papers and digital documents related to your current projects, you will also generate digital notes. Within */Current Projects*, create a notebook for any project that is generating notes.

In Evernote, create a notebook called */Fingertip Files*. The punctuation will cause this notebook to appear just below the */Current Projects* stack. Use the */Fingertip Files* notebook for those few notes you access most.

You have already seen the value of the *Temporary Trash Can* for housing both papers and digital documents for temporary storage of items that will not likely be needed. We need this same concept as a part of our Evernote setup. Create a notebook called */Temporary Trash Can*. Notice where this notebook appears in the list. In our paper filing system, the *Temporary Trash Can* occupies the first drawer of the reference filing system. In our digital filing system, the *.Temporary Trash Can* is the first folder in the list. In Evernote, */Temporary Trash Can* sorts below */Fingertip* and just above the other references notebooks.

Examine Your Other Storage Systems

When you created your digital filing system, you used your paper filing system as a guide, keeping the two reasonably parallel. Extend that concept to Evernote. The categories that have emerged in your life for your paper filing needs and digital filing needs are likely to surface as the categories into which your Evernote information will fit. As you brainstorm your notebook needs, let the filing systems you already have in place serve as guides.

That being said, you need not worry about having a complete notebook structure as you begin using Evernote. Creating a new notebook at any time, as well as moving information from one notebook to another, is easy. As you create more content in Evernote, the need for specific notebooks begins to emerge and morph on its own.

Digital Documents Versus Digital Notes

What do I put in the *Reference Files*, *Current Projects*, and *Fingertip Files* from Chapter 7 and what do I put into Evernote? That question leaves many novice Evernote users scratching their heads. My rule of thumb is as follows:

- When you have a completed *document* and are looking for a place to store it, store it in the folder structure discussed in Chapter 7. Examples would include reports, spreadsheets, presentations, and videos.
- When you need to *record* information and are looking for a place to do so, use Evernote.

Summary: Your Notes Just Became More Valuable

Taking notes is our strength; finding them later is our weakness. Ideas come at the most unlikely of times and places. The need to retrieve them is just as unpredictable. The "Information Age" challenges us to find easy ways to store information and retrieve it later. The modern school leader is rarely without a digital device. Therefore, having a digital note-taking system, accessible from anywhere, provides an answer for the challenge. As this book goes to press, nothing provides the power and flexibility to meet the challenge better than Evernote.

9 Putting It All Together

Mindy's Math Dilemma

Total control and peace of mind.

Mindy's worst fears were confirmed. As a first-year middle school principal, previous test scores and her personal observations indicated math to be a weakness for her school. Today, the envelope containing the results from the high-stakes test arrived. The scores in math were even lower than the year before. Mindy's heart sank.

All year, she felt her teachers lacked the resources and strategies for truly effective math instruction. She concluded the best time to start turning the ship around would be right now. She envisioned a curriculum guide that would pull together the best online resources and align them with standards, align the textbook to the standards, and provide material in those areas where the text did not adequately teach certain standards. Yes, it would be a big project, and she didn't exactly have all the answers before beginning. But, to let the downward spiral continue was not an option.

The Goal and the Next Step

Mindy recognized what she had was a *project* and a tangible goal would be realized when *the math curriculum guide had been published*. At that point, she would create other goals related to performance on formative assessments throughout the year. She would work with her teachers on how to set and follow-through on their individual goals. But for now, Mindy is focused on a centerpiece of this turnaround effort. Mindy goes to her digital task list, creates a new task and enters: *xx Math curriculum guide has been published*.

With the goal defined, Mindy now needs to identify a *next step*. "Mrs. Carter," Mindy thought. Mrs. Carter is a shining star in what is an otherwise weak math department. "I will begin this project with a one-on-one meeting with Mrs. Carter," she thinks.

With a teacher now appearing at her door, Mindy had only enough time to enter the next step and set the current day as the due date. Her task now resembles Figure 9.1.

Mindy gives her full attention to the awaiting teacher, knowing the next time she looks at her list, she will know where to begin with the math project. After the teacher leaves, Mindy picks up where she left off and composes a short email to Mrs. Carter explaining the project and asking if she can meet sometime this week.

After hitting send, Mindy knows that her next step is to expect a reply from Mrs. Carter. She changes the task, which now resembles Figure 9.2. At this point, she has no other plans. However, she has identified the two most important elements of project management. She has defined her goal, and she knows exactly what her next step will be. This project, like most, will begin to unfold. If Mindy tries to figure out all of the answers before she begins, her answers are likely to be wrong.

After school, Mindy starts to think about what she wants to discuss in her meeting with Mrs. Carter. She adds that information to the note section of the task, which now resembles Figure 9.3.

Mrs. Carter responds to the email, saying she would be delighted to help with this project. The two decide to meet during Mrs. Carter's planning time the following day.

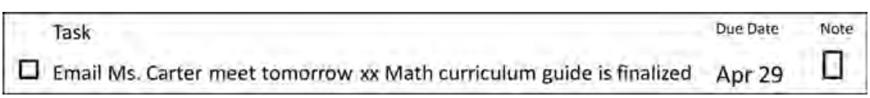

Figure 9.1 Next Step and Goal

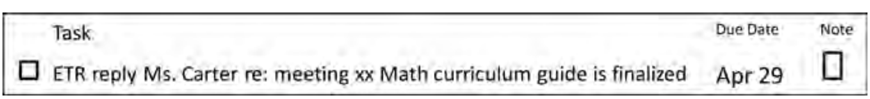

Figure 9.2 New Next Step and Goal

	Task	Due Date	Note
☐	ETR reply Ms. Carter re: meeting xx Math curriculum guide is finalized	Apr 29	☐
	Agenda:		
	3 weakest areas from test results		
	3 strongest areas from test results		
	Ms. Carter's impressions on why the results were what they were		
	Who should we include in planning process?		
	Does Ms. Carter know of other exemplary curriculum guides?		

Figure 9.3 Notes Added to Task

The Initial Meeting

During their meeting, the ideas begin to flow. Mrs. Carter talks about several websites she uses extensively. She talks about two outstanding workshops she has attended and the names of the presenters. For the next half-hour, the ideas continue to flow. They both agree the next step is to form a committee and brainstorm names of teachers from the school, teachers from the feeder schools, and a respected professor from a nearby university. Finally, Mrs. Carter agrees to chair the committee. She will plan the agendas and drive the decisions regarding content. Mindy's role will be to secure the resources, remove the roadblocks, and keep the project organized.

Mrs. Carter brought her student teacher and asked her to take notes. The student teacher brought her laptop and took notes in Evernote. After the meeting, she sent a copy of her notes to both Mrs. Carter and Mindy.

Project Planning

That afternoon, Mindy imports the student teacher's notes into her own Evernote and begins to review them, looking for future *next steps*. It's hard to believe that only a day before, Mindy's only plans involved setting a meeting with Mrs. Carter.

First, Mindy realizes this project is going to generate both paper and digital documents. With the meeting completed, she needs to define a new *Next Step*. Mindy takes the following actions:

1. Labels a manila folder "Math Curriculum Guide," puts a Xeroxed copy of the test scores in it along with a copy of scores from the previous two years. She places this folder with her other paper-based *Current Projects* files. She now has a place for any paper document generated during the project.
2. Creates a folder on her computer called "Math Curriculum Guide," and drags it inside her computer's *Current Projects* file. As an initial step, she scans the math test score results from the last three years and puts the digital copy in *Current Projects*. She electronically shares the folder with Mrs. Carter.
3. Creates a notebook called "Math Curriculum Guide," and puts it inside her Evernote *Current Projects* stack. She drags the notes sent from the student teacher into this notebook. Mindy expects she will send and receive some important emails about this project. She will be able to forward a copy of each to Evernote and store in this folder.
4. Finds the *xx Math Curriculum Guide has been published* task in her digital task list and changes the next step. She realizes this project will require a great deal of work for committee members and wants to secure stipends. She will need to talk to the superintendent about this plan. On her task list, she changes the next step to read, "Call Superintendent." So that she will know why she is calling, she adds "Discuss stipend for teachers" in the note section of the task.
5. While Mindy is setting up the structure for this project, Mrs. Carter walks in the door with 10 sample math curriculum guides she has borrowed from the education department at a nearby university. Because of the size of the material, putting it all in a file is not an option. She places this stack on the "Bulk" shelf in her closet.
6. While she has the task open, she wants to remind herself about the location of the supporting material. When she finishes, her task resembles Figure 9.4.

Throughout the life of this project, Mindy is focused on accomplishing the next step, and then replacing it with a *new* next step. Assigning and re-assigning due dates keeps the goal of publishing a math curriculum guide in front of her, along with the next step toward its completion. Whenever she wants to find this task, searching her task list for "math curriculum" will bring the task and its supporting material to the screen on any of her digital devices.

	Task	Due Date	Note
☐	Call Superintendent xx Math curriculum guide is finalized	May 1	☐
	Ask about stipends		
	Ask Ms. Carter about replies for potential committee membership		
	Location of other information:		
	Current Projects—Math Curriculum Guide		
	Dropbox—Math Curriculum Guide		
	Evernote—Math Curriculum Guide		
	Bulk—Books from Pleasantville University		

Figure 9.4 Updated Task

When the Dance Is Over

Mindy created a single task on her list and started by entering *xx Math curriculum guide has been published* on the subject line. Throughout the life of the project, she has kept the next step on the other side of the "*xx*." When this curriculum guide has been published, the project is complete. It's time for the clean-up work.

In the note section of the task, Mindy had listed the location of supporting material:

1. Manila folder in paper-based *Current Projects* files. Mindy examines the contents and disposes of anything that will not be of lasting value. She may even dispose of the entire folder. If some of the material is of lasting value, she can move this folder to her reference files. If room in the filing cabinets is at a premium, this file may be a candidate for off-site storage.
2. Folder in digital *Current Projects* file. Mindy purges this file just as she did its paper counterpart. She moves the folder into her *Documents* folder. A folder inside *Documents* called *Completed Projects* would serve as the perfect place for this digital file.
3. Notebook in Evernote *Current Projects* stack. Mindy purges this notebook. Conventional wisdom with Evernote is to keep the number of notebooks as low as practical. For this reason, Mindy could move the remaining notes to the *Journal* notebook and then delete the notebook created for this project.

4. "Bulk" shelf. Mindy adds a task reminding her to return the 10 sample math curriculum guides she has borrowed from the university.
5. Task list. Mindy finds the *xx Math Curriculum Guide has been published* task in her digital task list and checks it off as "done." Project completed!

Summary: Total Control and Peace of Mind

Mindy's story is probably not unlike yours. The next challenge can arrive at any moment. When it does, rather than view it as "one more thing to do," you can begin to make the decisions that move ambiguity to clarity, and clarity to results.

In addition to the curriculum guide, Mindy is handling other projects, each with its goal, next step, information, and both digital and paper supporting material. The repeating tasks involved in Mindy's job are all on her task list, which ensures that they surface at the right time. Papers appear in the tickler file at the right time. When important conversations unfold, Mindy has a system to trap the details.

With total control of her surroundings and commitments, Mindy is able to focus on the present, and do so with peace of mind. You can too.

10 Time Is My Friend

Make today count.

Time is the school leader's most precious commodity. Through this book, you have read the stories of other school leaders and the tools they use. Now, it's time to write your own story.

The demands of a changing world lead our society to do more, increase complexity, and ignore the finiteness of the time available. Our schools reflect these same tendencies, and we find ourselves facing enormous demands with limited time in which to address them. Our jobs are not the papers and emails that come at us from all sides. The inability to handle them, however, derails our leadership potential. My hope is that this book has provided an understandable framework to help you thrive in a complex environment.

Every reader is different, and for this reason, some strategies will resonate more with you than others. A colleague may read the same book and take from it entirely different ideas. I hope this book will earn a place close at hand, complete with highlighted sentences, margins filled with notes, and pages dog-eared to mark their easy retrieval. Each reading is likely to reveal a nuance previously unrealized.

Leadership is not reserved for those who hold a certain title. Our collective success depends upon the willingness of people all along the organizational chart to spread good ideas. They need the tools that make the complex simple, and this book has aimed to fill that need.

Every good thing we do for our students, our school systems, our communities, our families, and ourselves is accomplished through the dimension of time. For the organized school leader, time is a friend. Go make today count.

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