

# The Best of the Marshall Memo, Book One

Ideas and Action Steps to **Energize** Leadership, Teaching, and Learning

by Kim Marshall and Jenn David-Lang

A selection of the most compelling and helpful article summaries from 16 years of the Marshall Memo, with professional learning suggestions for each chapter

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# THE BEST *of the* MARSHALL MEMO

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BOOK ONE

*Ideas and Action Steps to Energize  
Leadership, Teaching, and Learning*



Kim Marshall & Jenn David-Lang

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# THE BEST *of the* MARSHALL MEMO

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BOOK TWO

*Ideas and Action Steps to Energize  
Leadership, Teaching, and Learning*



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## Chapter Two: Managing Time for Impact

*The job of the principal is 'undoable' in the sense that all the work never gets done.*

*So the principal who thrives must have a clear sense of which activities produce the most student gains.*

—DANIEL DUKE

Managing time is a perennial challenge for school leaders, who are uniquely vulnerable to interruptions and distractions that pull them away from the core work of instructional leadership. The articles in this chapter address three levels of the challenge: setting big-picture priorities, being proactive about preventing unnecessary work, and specific techniques that maximize effectiveness.

**Priorities** – Kenneth Freeston and Jonathan Costa say school leaders spend their time in three ways: value-added work, necessary work, and waste work. They argue that the key to effective leadership is maximizing time on work that improves teaching and learning, doing necessary work as quickly and efficiently as possible, and reducing waste work to an absolute minimum. Kim Marshall also highlights the ways school leaders can prioritize the most important work and avoid HSPS (hyperactive superficial principal syndrome): focus on a few “big rocks;” organize around them; be systematic about getting into classrooms; and take care of yourself. William Powell and Ochan Kusuma-Powell reprise Stephen Covey’s four quadrants model (1989) as a way to help school leaders think about time and priorities: concentrate on actions that are in Quadrant II—not urgent but central to student learning.

**Systems** – Justin Baeder believes principals have a lot to learn from today’s firefighters, who spend less time heroically carrying people out of burning buildings because they invested in preventing fires from happening in the first place. In schools, this means setting up systems that handle routine matters and allow leaders to focus on their core work, so they won’t get burned out.

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William Oncken, Jr. and Donald Wass say the wise manager builds initiative in subordinates so they will take responsibility for their core work and stop unnecessarily shifting tasks to the boss.

**Techniques** – James Fallows summarizes the recommendations of time management guru David Allen, including writing a master to-do list, reviewing the list once a week, and dealing quickly with items that take less than two minutes. James Surowiecki explores the psychology of procrastination—avoidance, denial, and sometimes a rational aversion to working on something that’s not important—and shares some time-tested methods for getting started on work that’s truly a priority. Verena von Pfetten cites research on how multitasking degrades performance and results in less being accomplished. The antidote: paying attention to one task or one person at a time.

### Questions to Consider

- How can school leaders make time for what’s truly important?
- Which leadership tasks have the biggest impact on teaching and learning?
- How can leaders be accessible without taking on everyone else’s problems?

## Priorities

### 1

#### Valuable Work, Necessary Work, and Waste Work

In this article in *Educational Leadership*, Connecticut educators Kenneth Freeston and Jonathan Costa channel the frustration of school leaders who know they aren't spending enough time on activities that improve teaching and learning. There are three common reactions: wishing there were more hours in the day; believing that "just getting organized" will lead to more efficient use of time; and thinking that being busy is the same as being productive.

None of these go to the heart of the matter, say Freeston and Costa. The solution is using the time we have more wisely. But how? The work of business expert William Conway (1992) is instructive. Conway spent twenty years helping corporate leaders use their time more thoughtfully and found that the first step is coming to a shared understanding of what *value* is. In the business world, value is a product or service the customer is willing to pay for. Having defined value, Conway divided the daily work of a corporate leader into three categories:

- *Value-added work* produces things that the customer wants; the value of the work is greater than the work itself.
- *Necessary work* is time spent on things that an organization must do to function but that have no direct value to the customer.
- *Waste work* is time spent on things that the customer will *not* pay for—errors, rework, problems, redundancies.

Conway's studies revealed that the average corporate leader spends 40 percent of the time doing waste work. Effective leaders, on the other hand, "... do not allow waste to accumulate. They systematically teach their employees to eliminate waste and streamline necessary work in order to maximize the time spent on value-added work."

Can this construct be applied to school leadership? The first challenge is defining value. "Business leaders have it easy when it comes to defining their primary goal," say Freeston and Costa. "They sell stuff. With education, it may seem more ambiguous, but it is nonetheless certain: The goal of a school is to create *learning*." From that starting point, it's possible to transpose Conway's three kinds of work to schools:

- *Value-added work* is any activity that leads directly to improvements in student learning—for example, research on effective instructional practices; observing and supporting classroom learning; keeping professional dialogues focused on learning.

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- *Waste work* is any activity that doesn't contribute to learning and could have been avoided if it had been done properly the first time—for example, correcting one's own mistakes or those of others; dealing with teacher, parent, or student complaints; conducting a meeting without the right people present.
- *Necessary work* is any activity that keeps the school running but has no direct impact on learning—for example, signing purchase orders; ordering supplies; supervising bus duty.

Freeston and Costa say the principal's challenge is reducing waste, improving efficiency, and aligning the work of the school with its primary goal. Sounds simple—right? Not so much! They go right to the thorniest issue: teaching. “The value of teaching is equivalent to the learning it creates,” they write. “To anyone who purports that teaching has intrinsic value, we say yes it does—to the extent that it creates learning. After all, from an educational consumer's point of view, if something is taught and not learned, does it really matter that it was taught?” This creates a high bar for principals as they analyze how much of their daily work truly adds value.

How can a principal get an accurate sense of the proportion of time spent on value-added work? Freeston and Costa did studies in which they beeped school leaders at random intervals and had them write down what kind of work they were engaged in at that moment—value-added, waste, or necessary. Principals found that after jotting down their activities for five to seven weeks (about eight hundred entries), value-added work made up only 10–20 percent of their time. They were horrified, and began looking much more critically at whether certain activities were really contributing to improved student learning.

Principals in the studies zeroed in on two arenas with a lot of waste work: school governance council meetings and faculty meetings (Freeston and Costa said the latter are often “a dead zone of value-added work.”) With this new consciousness, principals became much more aggressive about pre-screening agenda items for direct links to student learning, delegating necessary work to others, and driving out waste by implementing problem-solving and group-facilitation strategies.

Freeston and Costa then had the school leaders in their studies calculate their VQ—value quotient. This was the amount of value-added work divided by the amount of waste work (assuming a reasonably efficient percent of necessary work—less than 40 percent of each week). It turned out that a VQ of 1.0 was a threshold:

- Principals with a greater than one-to-one ratio of value-added to waste work “feel a great sense of worth and pride in their work.”
- Principals with less than a one-to-one ratio “tend to be numb to innovation, suspicious of new ideas, dispassionate toward improvement, and not willing to find challenge in their work. A cycle of chronically low VQ is characteristic of burnout.”

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In short, the challenge of every school leader is increasing the proportion of time spent on value-added work, doing necessary work as quickly and efficiently as possible, and cutting down on waste work. Freeston and Costa have found that when principals are successful in moving in this direction, there is a ripple effect in the school. When school leaders improve their value quotient, the VQ of their staff improves as well, resulting in fewer grievances, lower absenteeism, less resistance to academic initiatives, and better morale, motivation, and performance. VQ, they believe, “is an excellent measure of an educational institution’s ability to grow and sustain itself.”

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“Making Time for Valuable Work” by Kenneth Freeston and Jonathan Costa in *Educational Leadership*, April 1998 (Vol. 55, #7, pp. 50-52), summarized in Marshall Memo 146.

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## 2

### Ten Keys to Managing Time and Priorities

“How can a dedicated principal work really, really hard but fail to get significant gains in student achievement?” asks Kim Marshall in this *Principal Leadership* article. “The answer is obvious: by spending too much time on the wrong things and not enough on the right things.” H.S.P.S. (Hyperactive Superficial Principal Syndrome) is a perennial problem for principals; it’s a constant struggle to identify and work effectively on the right stuff and avoid being consumed by things that don’t really make a difference. Based on front-line experience and extensive reading, Marshall offers these pointers:

- *Identify a few “big rocks.”* In his book, *First Things First* (1996), Stephen Covey tells the story of a time management expert who put three big rocks into a mason jar and asked his listeners if it was full. Sure, they said. He then poured in a bucket of gravel and asked again. Probably not, was the response. He then poured in sand, and finally water. The moral? If you don’t put the big rocks in first, your time will be filled with smaller things, and you’ll never get to what matters most. “The key,” says Covey, “is not to prioritize what’s on your schedule, but to schedule your priorities.”

So, what are the big rocks for principals? Marshall offers the following list, saying that it’s possible to focus effectively on only two or three, and those need to be chosen after a careful diagnosis of the school’s situation.

- **Mission:** Staff, students, and parents know that the goal is to get all students on track for college and career success.
- **Climate:** The school is safe, respectful, and culturally competent.

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- Learning goals: Each teacher is working toward clear, detailed, rigorous, manageable state-aligned end-of-year student learning outcomes.
- Resources: Teachers have high-quality materials and tools.
- Informative data: Teacher teams use both on-the-spot and interim assessment results to continuously improve instruction, give students feedback, and reteach.
- Safety nets: Struggling students get prompt, effective support, both academic and non-academic, inside and outside regular school hours.
- Supervision and evaluation: Teachers get frequent, honest feedback on their performance, all keyed to what's producing student learning (and what's not).
- Professional growth: Teachers are constantly improving their craft through individual, small-group, and whole-staff activities—all informed by student learning results.
- Hiring: Every staff vacancy is filled with a top-notch performer.
- Parent involvement: Parents are optimally involved in their children's education.

“Once you’ve put your lean, mean strategic plan in place,” says Marshall, “it’s much easier to say no to off-mission activities, to be present for students and staff members, and to roll with the punches (because there will still be those crazy days).”

- *Set clear expectations.* It’s essential that all teachers have a clear idea of what their students must know and be able to do by the end of the year, as well as schoolwide guidelines on which discipline infractions must be referred to the office and which must be handled by teachers.

- *Decide on a planning system.* “The tug of H.S.P.S. is so constant and so inexorable that principals need a foolproof ritual to bring year-end goals down to the ground level,” says Marshall. The best time managers have a system for organizing priorities by the year, the month, the week, and the day—and a weekly planning time is essential. There also has to be a portable daily format that reminds the principal of the big rocks as well as daily obligations. At the end of most days, only half of these things will have been checked off—and then it’s time to think about what’s really important and plan for the next day.

- *Schedule key meetings.* “People are busy,” says Marshall. “Students are demanding. There’s always too much to do.” If key meetings aren’t in everyone’s calendars, they won’t happen. Especially important are weekly meetings of grade-level and subject-area teacher teams, where the all-important work of planning curriculum units and looking at student work and assessment data takes place.

- *Write it down.* “The challenge for principals is remembering and acting on the myriad items that flood their brains every day,” says Marshall. It’s essential to have a system for recording things and following up—otherwise the leader’s credibility with teachers, students, and parents will plummet, and the stress level will spike. Some suggestions:



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- Wear practical clothes that have pockets for a pen and paper or a holster for an all-purpose electronic device. Some women's fashions are unhelpful (no pockets!), and many men refuse to put anything in their shirt pockets after hearing junior-high-school peers called nerds. Marshall's advice to the men: Get over it!
- Consider writing must-remember items on different index cards so they are pre-sorted at the end of the day (e-mails on one, staff memo ideas on another, etc.).
- Attack in-basket items every hour and/or apply a fifteen-second rule: if it can't be signed, delegated, filed, or thrown away in that amount of time, put it in the pile for late afternoon or evening. "During the day," says Marshall of his years as a principal, "I was a people person, not a paper pusher."
- Do e-mail in efficient bursts early in the morning and late in the afternoon. "The beauty of e-mail is that it's asynchronous," says Marshall. "You can answer at your convenience (but hopefully within twenty-four hours)." The key to sanity is not using the audible signal that announces the arrival of each new e-mail (it's not a ringing phone!) and resisting the urge to stay on top of e-mails (on your desktop computer or smartphone) during the day. One way to signal this approach to colleagues is to always have an automatic response message on your computer: "I'm in classrooms during school hours and check e-mail each weekday afternoon after 3:00 p.m. If your message is urgent, please call me at (617) 555-0105."
- Be aware of the areas in which you're likely to fall victim to PAUT (Putting Aside Unpleasant Tasks). "Be honest: what are the things that you hate to do and creatively avoid?" asks Marshall. Financial stuff? Notes from upset people? Filing? Once you're clear on what they are, analyze why and develop a system for forcing yourself to do them—and reward yourself when they're done.
  - *Delegate, delegate, delegate.* Some principals have the urge to do everything themselves and can't stand when things aren't done just right. "The key to long-range sanity and effectiveness," says Marshall, "is hiring good people, nurturing them, and refraining from micromanagement... The goal is clear: teachers handling instruction and virtually all discipline problems, teacher teams using data to continuously improve teaching and learning, counselors preventing or dealing with students' emotional problems, custodians handling the physical plant, students taking increasing responsibility for their own learning—and the principal freed up to orchestrate the whole process and focus relentlessly on the big rocks (while occasionally picking up trash in the corridors)." Marshall also believes that teachers and principals should be pulled from classrooms and schools as little as possible and that it's important for the principal to be physically present as students enter the building in the morning, for at least one lunch period, and when students leave in the afternoon.

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- *Get into classrooms.* Conventional, announced teacher evaluations have four built-in flaws, says Marshall: They don't give principals a very accurate picture of day-to-day instruction; they put a premium on pleasing the boss, not on long-term student learning; they rarely improve teaching and learning; and they are so daunting and time-consuming that they prevent principals from being in classrooms on a regular basis. "Except for gathering evidence to dismiss an ineffective teacher," he writes, "conventional evaluation is a poor use of a principal's valuable time." But what's the alternative? Marshall suggests mini-observations—two to three short, unannounced classroom visits a day with a candid, informal face-to-face feedback conversation with each teacher within twenty-four hours. This creates hundreds of substantive conversations about teaching and learning each year, keeps the principal in close touch with what's really happening in classrooms, and saves time and energy for the biggest rock of them all—orchestrating a low-stakes process of teacher teams using interim assessment data to continuously improve teaching and learning.

- *Avoid time-wasters.* "A key to committing time to the right stuff is preventing or deflecting time-consuming crises and activities," says Marshall. Walking down a corridor when he was principal, Marshall once overheard a teacher utter the word "jackass," but was too distracted to follow up. The price for not addressing this immediately was more than twenty hours of wasted time dealing with the fallout when an angry parent stormed into the school the next day and had to be restrained from punching out the teacher for calling her daughter a jackass. "It's truly astonishing how much time a screw-up can consume," says Marshall ruefully. Other ways to cut down on wasted time include: organized meeting agendas and crisp closure; multi-tasking (within reason); and being out and about and spending very little time in the office for those frequent *Got-a-minute?* drop-ins. "A sitting principal is a sitting duck," he says.

- *Take care of yourself.* Burning out is not a good leadership strategy, says Marshall: "Good time management includes knowing your limits; planning for the long haul; and finding ways to fuel your physical, emotional, mental, and spiritual energy." (Patterson, 2007) This means exercising regularly (three times a week is plenty); eating the right foods (breakfast being the most important meal); getting enough sleep; carving out regular times for relaxation and fun (e.g., a movie most Friday nights); building a support system; and orchestrating small wins (success boosts optimism and energy).

- *Take stock.* Regularly evaluate your progress in the areas above, suggests Marshall. Effective practices will translate into better teaching and learning throughout the school.

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"The Big Rocks: Priority Management for Principals" by Kim Marshall in *Principal Leadership* (Middle and High School Editions), March 2008 (Vol. 8, #7, pp. 16–22), summarized in Marshall Memo 225.

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## 3

**Spending More Time on the Right Stuff and Less on the Wrong Stuff**

In this *Journal of Staff Development* article, William Powell and Ochan Kusuma-Powell (Education Across Frontiers) grapple with the challenge of leaders managing time in hyper-busy schools. “Unfortunately,” they say, “busy-ness doesn’t always equate with high-quality learning. In fact, once a school becomes too busy, that overload of activity often serves as a barrier to deep learning—for both students and adults. Some well-meaning schools suffer from organizational attention deficit disorder.”

The authors believe Stephen Covey’s four quadrants model (1989) is a helpful model for thinking about time and priorities. Picture a square divided into four quarters, with the vertical axis being urgent/not urgent, the horizontal axis important/not important.

- Quadrant 1 (top left): Important and urgent—pressing issues and problems, genuine crises, deadline-driven projects, health and safety issues;
- Quadrant 2 (top right): Important, not urgent—professional learning, inquiry, planning, structured reflection, preventive activities, relationship building, recreation;
- Quadrant 3 (bottom left): Urgent, not important—interruptions, some meetings, many phone calls, e-mails, and social media interactions;
- Quadrant 4 (bottom right): Not urgent, not important—trivia, some mail and e-mail, some phone calls, time wasters.

Quadrant 1 activities demand our attention and can be all-consuming, but spending too much time there leads to unhealthy stress and burnout. “Quadrants 3 and 4 are the domains of those who live irresponsible lives,” say Powell and Kusuma-Powell. “The tasks in these arenas are simply not important, and, in Quadrant 3, the urgency is coming from someone else—not from our own deeply held values and beliefs.” Quadrant 2 is the time management sweet spot where we get control of the torrent of urgent activities and focus on long-term accomplishments. It’s hard to force Quadrant 2 activities into our calendars, but that’s where “our actions are deeply aligned and congruent with our values. It is the home of responsibility and integrity.”

Powell and Kusuma-Powell point to three supremely unproductive activities that take up far too much time in schools:

- *Giving students feedback that isn’t used* – Conscientious teachers spend countless hours writing comments on students’ papers and projects, only to see students glance at the grade and toss the work aside. “Teacher feedback that isn’t used by students squanders billions of hours of teacher time each year,” say the authors.

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- *Poorly-run meetings* – “Many of the meetings we attend are enormous wastes of time,” say Powell and Kusuma-Powell. Their suggestions: First, come to grips with the fact that some tasks, such as drafting a document, don’t lend themselves to group collaboration (better to have one person create a draft, and then edit as a group). Second, meetings need to be guided by protocols “that focus the group’s attention and provide structure to the conversation.”

- *The traditional teacher-evaluation process* – Powell and Kusuma-Powell have asked hundreds of teacher groups if significant professional learning and growth has ever resulted from a formal evaluation. “The positive response is minuscule,” they say. “Most teachers (and many administrators) have come to perceive the annual process of teacher evaluation as an enormous waste of time—something mindlessly forced upon the evaluator and the evaluated. If the purpose of traditional teacher evaluation is to develop professional learning that results in enhanced performance in the classroom, it has been a miserable failure. Not only has it not produced meaningful professional learning and not enhanced student learning, it has served to create dependency relationships and has infantilized teachers. It has also done much to undermine the vital culture of relational trust that must form the fabric of culture in high-quality schools.”

Taking a hard look at time-wasting activities is difficult, conclude Powell and Kusuma-Powell. Many educators are too busy to step back and see the bigger picture. But, as Bob Garmston and Bruce Wellman have said, “Any group that is too busy to reflect on how it is working together is a group that is too busy to improve.”

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“Make the Most of Every Day” by William Powell and Ochan Kusuma-Powell in *Journal of Staff Development*, October 2015 (Vol. 36, #5, pp. 40–43, 46), summarized in Marshall Memo 610.

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## Systems

### 4

#### Defining and Protecting School Leaders' Core Work

In this article in *The Principal Center*, former principal Justin Baeder weighs in on the perennial issue of work-life balance for school leaders. “Evidence is starting to emerge that stress isn’t just endemic to leadership,” he says, “—it’s an epidemic .... Many hard-working educators seem to feel a strong sense of guilt around the idea of self-care, as if a ‘whatever it takes’ attitude toward student learning rules out any effort to limit one’s own stress.” This is a formula for overwork and burnout. To have a positive impact on student learning over time, says Baeder, principals need to pace themselves as professionals, not damage their health by acting like heroes.

An interesting parallel is what has happened in firefighting, a line of work with a long history of heroism. Rushing into burning buildings, carrying out gasping victims, and dousing raging fires—all this epitomizes bravery and self-sacrifice. But starting in the middle of the twentieth century, firefighters turned to a much more effective way to save lives: prevention. Firefighters now spend most of their time visiting schools, supervising fire drills, and checking on sprinkler and alarm systems, fire doors, and smoke detectors. According to Steven Pinker in his book, *Enlightenment Now* (Viking, 2018), firefighters now see a burning building every other year; 96 percent of 911 calls to fire stations are for cardiac arrests and other medical emergencies, and most of the rest are for small fires. “Professionalism outperforms heroism, every time,” says Baeder. “It’s not flashy, but it works far better.” So what’s the equivalent in the world of schools?

- *Define and protect the leader’s work.* That means staying focused on a well-defined leadership agenda designed to maximize student learning and having systems to prevent and deal with things that pull principals away from the core work. “If you’re fighting fires all day, every day,” says Baeder, “it’s time to step back and look at the system you’re dealing with. Do you have a wooden building with no sprinklers, metaphorically speaking? Are you plagued with perpetual emergencies that could and should be prevented by proactive leadership?”

One example is substitute teachers—calling them, assigning them, dealing with problems when they can’t handle classes, covering classes yourself when there aren’t enough subs or they arrive late. Baeder suggests putting some serious time into solving the problem up front: consulting colleagues in other schools who have a better system; recruiting a strong pool of subs; getting a staff member to train and handle subs; and delegating the daily business of calling and assigning replacement teachers to a competent person in the office.

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“Ninety percent of schools have already done this,” says Baeder, “and you can too. In fact, we have the knowledge and the ability to solve virtually every problem that’s currently stressing principals out. The key to sharing that knowledge and implementing it everywhere is to drop the pretention of heroism. We must instead adopt a mindset of professionalism, stop tolerating the endless cycle of burning buildings, and install the ‘sprinkler systems’ we need.”

- *Build low walls with gates.* If you don’t protect your core work from all the other agendas that compete for your time, says Baeder, you won’t be effective for students. Working with principals over the last decade, he’s noticed that “the most overwhelmed and stressed-out principals seem to be in a constant state of emergency. It’s not just that they’re dealing with a few emergencies. It’s that *everything* is an emergency all the time.” But in other schools, the same phenomena aren’t emergencies; they’re handled by systems. In the school where Baeder was principal, for example, there was already a good system for handling substitutes before he arrived—a combination of technology, delegated responsibilities, and resources that made subs “a permanently solved problem” that rarely demanded his attention.

Baeder likes the analogy of a low wall around a pasture. When teachers needed a substitute, they connected with the school’s online SubFinder system. If that didn’t arrange for a sub, they called the school’s office manager, who worked her magic with glitches in the automated system. If that failed, teachers could “jump over the wall” and bring the problem to him. Importantly, the “wall” was low enough that Baeder could see what was on the other side and intervene if necessary. The result: subs took very little of his time.

- *Designate exception-handlers.* Of course, not all problems can be solved with systems. How can principals keep from being pulled off agenda by unique situations that demand an immediate response? An example: there’s a traffic-flow issue out front at dismissal time. This kind of problem could come straight to the principal, but a better process (unless it’s a real emergency) is asking the safety committee to address it at the next meeting. “Again, the ‘wall’ protecting our time shouldn’t be so high that we’re fully insulated from every issue,” says Baeder. “But the wall should gently guide issues to the right ‘gate’.... ‘Let’s put that on the agenda’ is a magical phrase. It shows responsiveness and concern, but also a disciplined, measured response—you’re not dropping everything in response to someone else’s issue.”

Another example: a parent comes to the principal and says, “My kid is being bullied. What are you going to do?” The best scenario is that the school has a PBIS program in place and there’s a structured response ready to be implemented—a “gate” to which the principal can direct the parent. If such a program isn’t in place, the principal’s work is getting a program up and running, which will take time now but pays big dividends in the long run. That’s the macro work that

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prevents lots of inefficient micro stopgaps. “Again,” says Baeder, “think of these as low walls ... to keep people from dumping too many of their issues on us too easily. Some issues are big enough to get over them, and interrupt you immediately, like if there’s a fight, or a serious complaint about a teacher, or some other emergency. But other issues aren’t big enough to go over the wall, so you route them to the ‘gate.’ They walk around for a bit, come to a gate, and try to get in.”

Does this sound bureaucratic? Sure, but it’s bureaucracy in the best sense of the word—systems to get routine things done efficiently. It seems bureaucratic when the fire marshal comes around with a clipboard and scolds a principal for using door stops on fire doors and asks to see the fire drill logs. “Would it be more ‘heroic’ to carry people out of burning buildings?” asks Baeder. “Absolutely ... but which saves more lives—the professional process, or the heroic rescue?”

- *Keep regular working hours.* Even with good systems and low walls in place, leaders still get a lot of other people’s issues. That’s because there’s one leader and lots of stakeholders, and it’s very easy for them to buttonhole the leader or send an e-mail. “It’s important to recognize that this work is endless,” says Baeder. “There is no hope of ever being free from this work, or ever finishing it all .... You’re the bottleneck in your organization. So how can you keep these pressures from eating you alive?”

Step one, says Baeder, is recognizing that, “If you’re willing to stay at school until 9:00 p.m. every night, your work will oblige you by expanding to fill whatever time you give it .... If you feel guilty leaving at 5:00 p.m., just remember this: you’re never going to get everything done, and the longer you work, the more time you waste. You’ll approach each additional task with less mental energy, and you’ll be working on less and less important tasks as the evening wears on. Do the most important work first, and give yourself a hard deadline for going home. You’ll work faster and more efficiently, you’ll prioritize more rigorously, and you’ll be more effective.”

- *Don’t use text messages for tasks.* In recent years, there’s been a big increase in texting in professional contexts, accompanied by less use of e-mail, which Baeder believes is a big reason for leaders’ stress and overwork. Texts are great for quick questions, he says, but a very poor way to manage work. Why?

- Texts can’t be marked as unread.
- They’re difficult to forward or copy people on.
- They’re difficult to manage on your computer and other devices.
- They don’t integrate well with productivity tools like Outlook and Google Calendar.

The solution: Don’t let people text you at 10:00 p.m. and expect an immediate response, and don’t let people text you random requests that you’ll struggle to keep track of. Institute a clear

policy that people may e-mail you if they need you to do something, and model this by using e-mail the same way yourself.

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“How Instructional Leaders Can Create Healthy Work-Life Balance” by Justin Baeder in *The Principal Center*, March 2018, summarized in Marshall Memo 729.

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5

## Managers: Don't Let Subordinates Delegate Work to You!

In this *Harvard Business Review* article, management consultants William Oncken Jr. and Donald Wass tackle the perennial time management challenge of delegation. They start by delineating three types of work.

- Boss-imposed: A manager can't ignore these tasks without immediate consequences.
- System-imposed: These must be accomplished, but the penalties for not doing them are less direct and swift.
- Self-imposed: Some of these are discretionary, but some are imposed by subordinates.

The manager's goal, say Oncken and Wass, is to minimize or eliminate subordinate-imposed work, get control of boss- and system-imposed work, and maximize discretionary time.

The big problem, however, is that subordinates have a way of shifting work to the boss. “Most managers spend much more subordinate-imposed time than they even faintly realize,” say the authors. How does this happen? A manager is walking along a corridor and encounters a subordinate. “Good morning,” says the underling. “By the way, we've got a problem. You see ...” The manager quickly realizes two things: he knows enough to get involved, but doesn't know enough to solve the problem on the spot. “So glad you brought this up,” he says. “I'm in a rush right now. Meanwhile, let me think about it and I'll let you know.”

What just happened? Before this encounter, the monkey (the problem) was on the subordinate's back. When the subordinate said, “We've got a problem,” the monkey was astride both backs. After the encounter, it was on the manager's back. “Subordinate-imposed time begins the moment a monkey successfully executes a leap from the back of a subordinate to the back of his superior,” say Oncken and Wass, “and does not end until the monkey is returned to its proper owner for care and feeding. In accepting the monkey, the manager has voluntarily assumed a position subordinate to his subordinate .... The manager has accepted a responsibility from his subordinate, and the manager has promised him a progress report. The subordinate, to make sure the manager does not miss the point, will later stick his head in the manager's office and cheerily query, ‘How's it coming?’ (This is called ‘supervision.’)”



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In this and countless other interactions, the monkey starts as a joint problem but quickly ends up on the manager's back. Pretty soon the manager is overwhelmed by subordinate-imposed tasks that require follow-up, develops a reputation as a bottleneck, takes weeks to get to things, gets stressed-out, makes his family unhappy by working all weekend, and leaves subordinates spinning their wheels waiting for direction. "Worst of all," say Oncken and Wass, "the reason the manager cannot make any of these 'next moves' is that his time is almost entirely eaten up in meeting his own boss-imposed and system-imposed requirements. To get control of these, he needs discretionary time that is in turn denied him when he is preoccupied with all these monkeys. The manager is caught in a vicious cycle."

A wise manager, say Oncken and Wass, will call each subordinate in, put the monkey on the table between them, "and figure out together how the next move might conceivably be the subordinate's. For certain monkeys, this will take some doing. The subordinate's next move may be so elusive that the manager may decide—just for now—merely to let the monkey sleep on the subordinate's back overnight and have him return with it at an appointed time the next morning to continue the joint quest for a more substantive move by the subordinate. (Monkeys sleep just as soundly overnight on subordinates' backs as on superiors')." But most subordinates will leave the manager's office with monkey firmly on their backs and a deadline to produce an answer. The manager might use some of his newfound discretionary time strolling around, sticking his head into people's offices asking, "How's it coming?"

The point, say the authors, is to develop *initiative* in subordinates. They won't take it until they *have* it. If the manager has all those monkeys on his back, "he can kiss his discretionary time goodbye." Here are the five degrees of initiative that people can exercise in an organization, from the lowest to the highest:

- Wait to be told what to do.
- Ask what to do.
- Recommend, then take appropriate action.
- Act, but advise at once.
- Act on one's own, then routinely report.

People working at the lowest levels have no control over their time. Those working at the third, fourth, and fifth levels can increasingly manage their own time. "The manager's job, in relation to his subordinate's initiatives, is twofold," say Oncken and Wass. "First, to outlaw the use of initiatives 1 and 2, thus giving his subordinates no choice but to learn and master 'Completed staff work'; then, to see that for each problem leaving his office there is an agreed-upon level of initiative assigned to it, in addition to the agreed-upon time and place of the next manager-subordinate conference."

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“Get control over the timing and content of what you do,” conclude Oncken and Wass. Eliminate subordinate-imposed time. Use the newfound discretionary time to see to it that subordinates take the initiative. And then get control over boss-imposed and system-imposed work. “The result of all this is that the manager will increase his leverage, which will in turn enable him to multiply, without theoretical limit, the value of each hour that he spends in managing management time.”

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“Management Time: Who’s Got the Monkey?” by William Oncken, Jr. and Donald Wass in *Harvard Business Review*, November/December 1974 (Vol. 52, #6, pp. 75–80), summarized in Marshall Memo 441.

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## Techniques

### 6

#### Mastering Workflow

In this article in *The Atlantic*, James Fallows admits that he was a highly disorganized person who nonetheless got things done. A few years ago, he heard about David Allen, a consultant on time management and personal organization, and was intrigued enough to read his book, *Getting Things Done: The Art of Stress-Free Productivity* (Penguin revised edition, 2015), attend several seminars, and interview Allen and a number of people who had been through his program. Despite initial skepticism, Fallows found Allen's ideas very helpful and was even successful at digging through the archeological layers of stuff on his own desk.

Allen's aim is not to help people get more work done but to get them to feel less anxious and racked with guilt about what they can and cannot do. This comes from his belief that the difference between done and undone tasks is more stressful than we realize. When our ancestors worked (harvesting wheat, chopping wood, etc.) there was a sense of completion and work produced visible results every day. For modern people "each day is a fog of constantly accumulating open-ended obligations, with little barrier between the personal and the professional and few clear signals that you are actually 'done.' E-mail pours in. Hallway conversations end with 'I'll get back to you.' The cell phone rings. The newspaper tells you about movies you'd like to see, recipes you'd like to try, places you'd like to go. There are countless things that everyone really 'should' do more of—exercise, read, spend time with the family, have lunch with a contact, be 'better' at work. The modern condition is to be overwhelmed, ... to feel not just tired but chronically anxious because so many things you have at some level committed to do never get done." (Fallows paraphrasing Allen.) Here is Fallows's summary of six key points from Allen's program:

- *Get everything out of your head by making a complete list of everything you want to, have to, or are expected to do.* Only when you are sure that all your obligations are written down and retrievable can you stop waking up at 3:00 a.m. A small-scale example of this principle is a date-book. Most people don't worry about forgetting appointments because they write them in their date-books and know that they will check their books frequently. Allen says that busy people need a "leak-proof collection system" for *all* their obligations—a way in which all the old stuff and any new thoughts, chores, and plans get *written down*. He recommends carrying a pad, smartphone, or some other device and recording ideas the minute they pop into our heads—the errand to run, the call to make, etc. Fallows has started doing this himself, thinks it's helped a lot and reduced his anxiety level,

and says he now gets nervous when people tell him they're going to do something and don't write it down.

- *Identify the "next action" toward a demanding goal.* This is Allen's version of the homily about a journey of a thousand miles beginning with a single step. "The more important a goal is (fix your marriage, get a better job)," says Fallows, "the easier it is to procrastinate, because people don't know just where to start. Allen emphasizes that almost any undertaking involves a specific and manageable *next* thing to do." Often this is as simple as making a phone call or setting up an appointment. Thinking in terms of next actions and listing them all "reduces each new challenge or commitment to a series of specific steps. As a corollary [Allen] says that meetings should never end without an agreement on what next step each participant is expected to take."

- *Set up reminders and tricks to increase the chances that all the little to-dos actually get done.* What do people do when they want to be *absolutely* sure they don't forget to bring something with them in the morning? They put it in front of the door so they can't miss it on the way out. Grouping tasks by context (where and when you might actually do them), rather than by their importance to you, is a basic difference between Allen's system and Stephen Covey's "four quadrants" approach. Covey recommends that we match our long-range goals with our hour-by-hour activities in order to spend as much time as possible doing the most important tasks. Allen says that his system is more flexible and less likely to be swamped by e-mail, phone calls, interruptions, and new tasks.

- *Develop the habit of review.* Allen recommends a regular "weekly review" of an hour or so to go over the list of all long-term projects and short-term next actions. "... If you apply the habit of looking over everything once a week," says Fallows, "you can feel comfortable about never being more than a week behind in tending to important matters."

- *Apply the "two-minute rule" to over-the-transom stuff.* When you are going through mail, phone messages, e-mails, etc., do immediately the things that can be completed in less than two minutes. Allen explains: "That's more or less the point where it starts taking longer to store and track an item than to deal with it the first time it's in your hands. In other words, it's the efficiency cutoff. If the thing's not important enough to be done, throw it away. But if it is important enough that you are *ever* going to do it [and it can be done in less than two minutes], the efficiency factor should come into play, which means doing it right now. This rule is magic."

- *Get your e-mail in-box back to "empty" each day.* This doesn't mean that every single e-mail is fully dealt with by the end of the day. It means that those that could be done in under two minutes are answered and filed, that the Viagra ads are thrown away, and that important items are printed out or stored in an "Action" folder on the desktop—some place where you're sure you'll get to them at a time you've blocked out. Allen says that this approach is the key to keeping e-mail under control.

The goal of Allen's overall system is to reduce stress, and Fallows says it works (as did the people he interviewed who had been through the program). Fallows also likes Allen's recommendation to look at life from different vantage points at different points in the day and week: the "runway level" at times when we're applying the two-minute rule, the fifty-thousand-foot level, where we're contemplating the meaning of life. The loftiest level interests Allen the most at this point in his life: "My perspective is that until you have fully fulfilled your destiny as a human spirit on the planet, you'll probably be in some level of stress." Fallows describes himself shying away from this line of thinking in a conversation with Allen and returning to the safer realm of e-mail management. "You want to operate just at the runway level?" replied Allen. "That's fine! Let's see how things can get done with the least effort. But if you're interested in where all this came from, where we came from, then we can have another conversation." Fallows's reaction: "I'll put it on my list."

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"Organize Your Life!" by James Fallows, *Atlantic Monthly*, July/August 2004 (Vol. 294, #1, pp. 171-176), summarized in Marshall Memo 41.

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7

## The Psychology of Procrastination

In this article in *The New Yorker*, James Surowiecki explores the reasons for procrastination, which he calls "a basic human impulse." The word comes from Latin—"to put off for tomorrow"—and consists of not doing what we think we should be doing—"a mental contortion that surely accounts for the great psychic toll the habit takes on people," he says. "This is the perplexing thing about procrastination: although it seems to involve avoiding unpleasant tasks, indulging in it generally doesn't make people happy." And it seems to be creating increasing anxiety in the modern era, judging by more-frequent references to it in literature and popular culture. Procrastination can be costly: Americans waste hundreds of millions of dollars by filing their tax returns late and forgo vast sums by not getting around to signing up for a retirement plan.

The basic problem is that we tend to do what is in front of us rather than what is out of sight, however positive and attractive future rewards may be. "Our desires shift as the long run becomes the short run," says Surowiecki. There's also the "planning fallacy"—the tendency to underestimate the time it will take to complete a task by ignoring how long similar tasks have taken in the past. "When I was writing this piece, for example, I had to take my car into the shop, I had to take two unanticipated trips, a family member fell ill, and so on," he says. "Each of these events was, strictly speaking, unexpected, and each took time away from my work. But they were really just the kinds

of problems you predictably have to deal with in everyday life. Pretending I wouldn't have any interruptions to my work was a typical illustration of the planning fallacy."

Avoidance and denial aren't the only reasons for procrastination. We often tend to do things "whose only allure is that they aren't what we should be doing," says Surowiecki. "My apartment, for instance, has rarely looked tidier than it does at the moment."

Another cause of procrastination is "lack of confidence, sometimes alternating with unrealistic dreams of heroic success," he continues. Civil War General George McClellan was a classic example of this. He dithered and dallied, planned incessantly, and constantly asked for more troops and better equipment. "Viewed this way," says Surowiecki, "procrastination starts to look less like a question of mere ignorance than like a complex mixture of weakness, ambition, and inner conflict." It's as though there were different parts of ourselves debating with each other—"jostling, contending, and bargaining for control . . . In that sense, the first step to dealing with procrastination isn't admitting that you have a problem. It's admitting that your 'yous' have a problem."

Surowiecki says the philosopher Don Ross framed the problem correctly: "For Ross, the various parts of the self are all present at once, constantly competing and bargaining with one another—one that wants to work, one that wants to watch television, and so on. The key, for Ross, is that although the television-watching self is interested only in watching TV, it's interested in watching TV not just now but also in the future. This means that it can be bargained with: working now will let you watch more television down the road. Procrastination, in this reading, is a result of a bargaining process gone wrong."

The idea of the divided self suggests the best ways to deal with procrastination, says Surowiecki: employing "external tools and techniques to help the parts of ourselves that want to work." The classic example is Ulysses ordering his men to tie him to the mast of his ship so he wouldn't be able to steer into the rocks when the Sirens' song wafted their way. Similarly, Victor Hugo would write in the nude and have his valet hide his clothes so Hugo couldn't go outside while he was supposed to be writing. A contemporary example: a program that cuts off your Internet access for eight hours so you can focus on a project.

Another approach is trying to strengthen your will. "This isn't a completely fruitless task," says Surowiecki. "Much recent research suggests that will power is, in some ways, like a muscle and can be made stronger." But the same research says we have a limited supply of will power and it can be used up quite quickly. One experiment found that people who resisted the temptation to eat forbidden chocolate-chip cookies had less will power left when asked to persist with a challenging task.

Which brings us back to one of the most common external devices for dealing with procrastination: deadlines. Here's an interesting experiment: Students are required to complete three papers

by the end of the semester. They can submit them all on the last day, or they can set three deadlines, with a grading penalty for missing any of them and no advantage for early submission. The rational thing is to stick with the end-of-semester deadline and hope to finish one or two of the papers early. But most students choose to set three deadlines. “This is the essence of the extended will,” says Surowiecki. “Instead of trusting themselves, the students relied on an outside tool to make themselves do what they actually wanted to do.”

A final way of dealing with procrastination is reframing the task in front of you. “Procrastination is driven, in part, by the gap between effort (what is required now) and reward (which you reap only in the future, if ever),” says Surowiecki. “So narrowing the gap, by whatever means necessary, helps.” One way is to divide large, long-term projects into short-term projects with discrete deadlines. This is the approach recommended by time-management guru David Allen (author of *Getting Things Done*): “the vaguer the task, or the more abstract thinking it requires, the less likely you are to finish it.” Reduce your choices, and you’re more likely to make the right one.

Surowiecki closes with a confounding thought: sometimes we procrastinate because what we’re supposed to be doing is not worth doing at all. So the deepest challenge is knowing which kind of procrastination we’re confronted with: “the kind that’s telling you that what you’re supposed to be doing has, deep down, no real point,” or the kind that’s telling you to get to work and DO IT! “The procrastinator’s challenge, and perhaps the philosopher’s, too,” says Surowiecki, “is to figure out which is which.”

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“Later: What Does Procrastination Tell Us About Ourselves?” by James Surowiecki in *The New Yorker*, October 11, 2010, summarized in Marshall Memo 491.

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## 8

### The Virtues of Single-Tasking

In this *New York Times* article, Verena von Pfetten reviews some findings from the research on multitasking:

- Interruptions as brief as two or three seconds double the number of errors people make on a task they’re performing.
- We have finite neural resources that are depleted every time we switch between activities, which can happen more than four hundred times a day.
- Multitasking is cognitively exhausting; it’s one reason people feel tired by sundown.
- The more we multitask, the more distractible we are.

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- Multitasking is self-reinforcing; the more we allow ourselves to be distracted, the more we feel the need to be distracted.
- Switching between activities decreases our enjoyment of any one of them.
- Having a cell phone in view markedly reduces empathy and rapport between two people having a conversation.
- The counterintuitive bottom line: multitaskers actually get less done.

What does all this imply? Von Pfetten defines *single-tasking* (sometimes called monotasking or unitasking): “Not the same as mindfulness, which focuses on emotional awareness, monotasking is a twenty-first-century term for what your high-school English teacher probably just called ‘paying attention.’” Psychologists have documented a number of advantages to focusing on one thing, including the obverse of the list above: fewer errors, less distractibility, more enjoyment, deeper and more satisfying conversations, less fatigue, and improved productivity. “Almost any experience is improved by paying full attention to it,” says author Kelly McGonigal. “Attention is one way your brain decides, ‘Is this interesting? Is this worthwhile?’”

Very busy people—parents and teachers, for example—may find single-tasking challenging because they’re constantly pulled in so many different directions. “In those cases, try monotasking in areas where you can,” suggests von Pfetten, “—conversations with your children, reading a book in bed before going to sleep, dinner or drinks with friends.” Exercise is also helpful for focusing. Another strategy is starting small, giving yourself just one morning a week to experience again what it’s like to immerse yourself in one thing. And in conversations, concludes McGonigal, “Practice how you listen to people. Put down anything that’s in your hands and turn all your attentional channels to the person who is talking. You should be looking at them, listening to them, and your body should be turned to them.”

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“Drop Everything and Read This” by Verena von Pfetten in *The New York Times*, May 1, 2016, summarized in Marshall Memo 638.

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## *Professional Learning Suggestions for Chapter Two Managing Time for Impact*

### **How Leaders at *Your* School Can Improve Time Management**

It's one of the easiest things for school leaders to read about and yet one of the most difficult things to implement regularly: managing time! To ensure that the ideas in this chapter truly take root after you read them, below are two suggestions:

- Get *another leader* (a colleague) to commit to reading and engaging in the professional learning activities below in order to hold each other accountable, or
- For an extra boost in productivity at your school, conduct the professional learning activities below with your entire leadership/cabinet/district *team*. This way, instead of being the only leader who becomes skilled in time management, you can raise the productivity level of your entire leadership team. This will, in turn, greatly benefit your entire school.

#### **I. Three Essential Time-Management Subskills to Master**

While the articles in this section focus on different aspects of time management, three larger sub-skills emerge:

- A. The ability to prioritize what is most important
- B. The ability to organize tasks and get them done
- C. The ability to delegate and maximize the use of teams

With a colleague or team of leaders, discuss the difference between the three abilities above and how they interrelate.

Next, look back at the chapter and discuss how the varying approaches to time management fit into these three categories. Some of the approaches include:

- (Article 1) William Conway's division of work into three categories as they apply to schools: *value-added work* (leads to improvement in student learning); *waste work* (doesn't

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contribute to learning and could be avoided, like mistakes); and *necessary work* (keeps the school running, like ordering supplies)

- (Article 2) Kim Marshall’s “big rocks” for principals (such as mission, climate, learning goals, etc.)
- (Article 3) Steven Covey’s division of tasks into four quadrants (Quadrant 1: important and urgent; Quadrant 2: important, not urgent; Quadrant 3: urgent, not important; and Quadrant 4: not urgent, not important)
- (Article 4) Justin Baeder’s ideas to define and protect the leader’s work
- (Article 5) Oncken and Wass’s goal to “get the monkey off your back” by helping subordinates develop initiative
- (Article 6) Having a system for being organized and getting things done, based on the ideas of David Allen
- (Article 8) The importance of engaging in “monotasking” rather than multitasking, as Verena von Pfetten suggests

### **II. Self-Assess Your Own Time Management Skills**

Individually, have your leadership team members or just you and your accountable colleague assess your own time management skills by filling in Kim Marshall’s Instructional Management Rubric (see Article 2) on the next page:

# THE LEADER'S TOOLKIT

## Instructional Management Rubric

Kim Marshall, revised 2016

	<b>4</b> Highly Effective	<b>3</b> Effective	<b>2</b> Developing	<b>1</b> Novice
<b>A.</b> Focus	I have a laser-like focus on student achievement and my strategic plan for the year.	I keep student achievement and my strategic plan in mind every day.	I periodically remind myself of my strategic plan and the goal of student achievement.	Each day is driven by events, not by my long-term goals.
<b>B.</b> Planning	I have an effective personal planning system for the year, month, week, and day.	I write down a list of what I want to accomplish each week and day.	I come to work with a list of what I want to accomplish that day.	I have a list in my head of what I want to accomplish each day but sometimes lose track.
<b>C.</b> Monitoring	I regularly evaluate progress toward my goals and work on continuous improvement.	I periodically review how I am doing on my weekly goals and try to do better.	I try to keep track of how I am doing on my goals.	I occasionally berate myself for not accomplishing my long range goals.
<b>D.</b> Expectations	Staff know exactly what is expected of them in terms of classroom instruction and discipline.	Most of my staff know what is expected in terms of classroom instruction and discipline.	I often have to remind teachers of policies on instruction and discipline.	I am constantly reminding staff to use better procedures for instruction and discipline.
<b>E.</b> Collaboration	All key teams are scheduled and regularly do high-quality work together.	Key team meetings are scheduled and take place regularly.	Each month I have to schedule key meetings because they are not in people's calendars.	I call grade-level, curriculum, and other meetings when there is a crisis or an immediate need.
<b>F.</b> Instruction	I visit 2-3 classrooms a day and give face-to-face feedback to each teacher within 24 hours.	I get into some classrooms every day and give personal feedback to each teacher.	I try to get into classrooms as much as possible but many days I don't succeed.	I am so busy that I rarely visit classrooms.
<b>G.</b> Follow-Up	I have a foolproof system for writing things down, prioritizing, and following up.	I almost always write important things down and follow up on the most critical ones.	I try to write things down but am swamped by events and sometimes don't follow up.	I trust my memory to retain important tasks, but I sometimes forget and drop the ball.
<b>H.</b> Delegation	I have highly competent people in key roles and delegate maximum responsibility to them.	I give key staff people plenty of responsibility for key items.	I have trouble letting go and delegating a number of key tasks.	I end up doing almost everything myself.
<b>I.</b> Prevention	I have effective strategies for preventing or deflecting time-wasting crises and activities.	I am quite good at preventing or deflecting most time-wasting crises and activities.	I try to prevent them, but crises and time-wasters sometimes eat up large chunks of time.	Much of each day is consumed by crises and time-wasting activities.
<b>J.</b> Balance	I am sharp and fresh because I attend to family, friends, fun, exercise, nutrition, sleep, and vacations.	I am mostly successful in balancing work demands with healthy habits and a life outside school.	I'm not always attending to family, health, exercise, sleep, and vacations.	Work and/or personal life are suffering because I rarely exercise, don't sleep enough, and am in poor health.

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Next, record your scores by subskill below:

- The ability to prioritize (enter the average of your scores on A. Focus, D. Expectations, and F. Instruction): \_\_\_\_
- The ability to organize tasks and get them done (enter the average of your scores on B. Planning and G. Follow-Up): \_\_\_\_
- The ability to delegate and maximize the use of teams (enter the average of your scores on E. Collaboration and H. Delegation): \_\_\_\_
- The ability to self-monitor and maintain a work-life balance (enter the average of your scores on C. Monitoring and J. Balance): \_\_\_\_

Based on your average scores for each of the four areas above, choose the professional learning activities below that best match the areas you would like to improve.

### **III. If You Need Improvement in Prioritizing (A. Focus, D. Expectations, and F. Instruction)**

*A. Distinguish which tasks are highest priority for you as the leader.*

You cannot choose to engage in the highest priority tasks if you do not know which tasks are most important.

With your colleague or leadership team, review the articles that address prioritization (Articles 1, 2, 3, and 5).

These articles each describe different ways to think about high-priority tasks (the Quadrants, “big rocks,” etc.). Choose the one that makes the most sense to you, and then discuss and sort the tasks in the box below into different priority-level categories.

For example, here are the categories of tasks from Article 2:

*Value-added work* (leads to improvement in student learning)

*Waste work* (doesn’t contribute to learning and could be avoided, like mistakes)

*Necessary work* (keeps the school running, like ordering supplies)

Examine the following tasks, discuss them with your colleague/team and sort them into the proper categories.

## THE LEADER'S TOOLKIT

### Common School Leader Tasks

*planning professional learning, ensuring buses run smoothly, addressing bullying, balancing the budget, going to the gym regularly, providing supports for struggling learners, dealing with complaints, finding substitute teachers, getting buy-in for the school mission, improving parent involvement, setting up systems for clear communication with staff, observing and coaching teachers, picking up litter from hallways, responding to parent complaints, infusing the school with technology, ordering supplies, developing a strong culture, dealing with traffic at dismissal time, supporting teacher teams, engaging in personal professional development, redoing a task because it was done improperly the first time, hiring, greeting families in the morning, ensuring even implementation of the discipline policy, scheduling, conducting meetings that consist of announcements*

<i>Value-added work</i>	<i>Waste work</i>	<i>Necessary work</i>

*B. Determine which activities currently take up most of your time.*

It is hard to become more efficient if you don't know exactly how you are spending your time right now.

Have your leadership team or you and your colleague take a week to code all of your activities according to the six categories below from a large-scale study of principals' use of time (for more information about the study, see Marshall Memo 349 or access it here: <https://web.stanford.edu/~sloeb/papers/Principal%20Time-Use%20%28revised%29.pdf>)

(If you have a clear understanding of your time use and don't want to spend a week doing this, just rate yourself as high, medium, or low for each category.)

1. **Administration** – discipline, lunch duty, attendance, student records, compliance
2. **Organization Management** – budget, school facilities, school schedule, safety, managing non-instructional staff

## THE BEST *of the* MARSHALL MEMO

3. **Day-to-Day Instruction** – observations, coaching, evaluations, feedback, PD, data-informed instruction
4. **Instructional Program** – summer school, afterschool, evaluating curriculum, using assessment results for program evaluation, planning PD
5. **Internal Relations** – interactions with staff, interactions with students, communicating with parents, attending school events (sports, arts, etc.)
6. **External Relations** – interactions with the community, interactions with the district, fundraising

*Results from the study—how principals use their time:*

27% on administration  
21% on organization management  
19% on other tasks—lunch, bathroom, transitions  
15% on internal relations  
7% on the instructional program  
6% on day-to-day instruction  
5% on external relations

After a week, discuss your own results with your colleague or your team. How do your results compare to the results from the study? How well do your results align with the tasks you want to prioritize?

*C. Determine your priorities and bring them to life.*

If you are not spending the most time on tasks that will improve student learning, now is the time to start.

Before meeting with your colleague or leadership team, gather some quantitative and qualitative (surveys, observations) data that will illuminate student learning gaps.

Next, come to the meeting prepared to think through the questions in the second column and create a plan in the third column in the following chart. For example, if the data reveal that vocabulary is a particularly weak area across the school, you may want to create a SMART goal for this area, focus every PD session on this topic, and schedule biweekly coaching meetings with teachers that include vocabulary as a standing agenda item.

## THE LEADER'S TOOLKIT

From the Instructional Management Rubric	Think	Plan
<b>A. Focus</b> – laser-like focus on student achievement	Based on quantitative and qualitative data, what is your student achievement goal?	Write your goal here:
<b>D. Expectations</b> – staff know exactly what is expected to meet the student achievement goal	How will you convey this goal to everyone? How will you help teachers learn what they need to do to meet the goal?	Write your plan here:
<b>F. Instruction</b> – leader observes for movement toward student achievement goal in 2-3 classes a day and gives teachers feedback and coaching in this area	How will you ensure that you focus on this goal when observing and debriefing with teachers?	Write your plan here:

### IV. If You Need Improvement in Organizing Tasks and Getting Them Done (B. Planning and G. Follow-Up)

Sometimes time management issues stem from being unsure about priorities (addressed above), and sometimes they result from not having a clear organizational system. Given the demands of the job of school leader, it is impossible to truly be effective without being organized. The activities below will help.

*A. Discuss your current organizational system.*

With your colleague or leadership team, take a few minutes to reread Article 7 (Mastering Workflow) in the chapter. Next, discuss how you currently stay organized and which parts of the article sparked ideas for you.

*B. Prepare to fully implement an organizational system.*

If your leadership team has time to delve further into David Allen's system, you should consider conducting a study group with his book, *Getting Things Done: The Art of Stress-Free Productivity*. As an alternative, you can start now with the following simplified version.

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At the heart of the organizational system described in Fallows's article are four key (CORE) steps:

**Capture** – You must collect every task you need to complete in one place.

**Organize** – You need to organize these tasks in a logical way.

**Review** – You need to regularly review these tasks so you know when to do what.

**Execute** – You need to actually *do* the tasks!

Here are a few activities to do with your team to get started on the first two parts of the system:

**Capture** – You may want to have leaders research different electronic tools so they can discuss the choices that exist. Or they can simply discuss the tools they currently use to capture every task. Once you have done this, have everyone on the team commit to just *one* capturing tool and record commitments below:

School Leader Name	Which tool will you use to capture all to-do items-- paper (like index cards or notebook) or electronic (apps like OneNote or Notability)?

**Organize** – The goal is to be able to know where to put every task. David Allen suggests that you organize all tasks into one of the eight “buckets” listed below. Have each member of your leadership team learn about two of these categories (from Allen's book) and what is needed to set them up. At the next meeting, jigsaw and have everyone share what they've learned and make sure everyone knows what to do to set up each bucket.

*Next Actions* – These include all of the one-step actions we need to take by ourselves, such as call Jim Smith, draft ideas for the conference, etc. Most of us have around 50–150 of these items.

*Calendar* – The calendar should *only* be used to remind you of those items that are time-specific or day-specific (can happen any time but *must* be on a certain day). Your to-do items should *not* appear here (they belong in *Next Actions* above) otherwise they cloud what absolutely must get done on each day.

*Waiting For* – When you decide to delegate tasks, this list will remind you of what you are waiting for and from whom.



## THE LEADER'S TOOLKIT

*Projects List* – This is a list of all projects, requiring more than one action step, that can be accomplished in a year. This is simply an index of the *names* of the projects, such as: get new staff member on board, update will, upgrade computers, etc.

*Project Materials* – While the *Projects List* is the list of the *names* of the projects, this category includes the actual file folders or computer files that will hold all of the materials for each project.

*Trash* – These are the things you want to quickly throw away, delete, shred, or recycle.

*Someday/Maybe* – This is a list of useful and inspiring items you might do someday. Let's say you read an article that gives you an idea, but you can't do it now. That idea goes on this list. It could be anything from *Learn Spanish* to *Set up a foundation*.

*Reference* – You probably receive a lot of useful information that you would like to reference someday. Whether you receive a menu for a local café or an article to keep on file, you need to set up a way to store and file these items—both paper and electronic—that can be easily accessed when required.

Next, do the following activity so that everyone understands exactly which tasks fit in which categories.

As a group, simulate what happens with a few sample to-do items. For example, you pass a teacher in the hall and she says, “You had mentioned that interesting Marshall Memo article about writing across the curriculum—would you mind sending it to me?” As a group, discuss the path this task would take. (You would “capture” it on paper or electronically, then later you would need to decide if it takes less than two minutes—remember the article?—and just do it or put it on your *Next Actions* list.)

Have the group do the same for these tasks—which buckets would these land in?

- 1) You need to ask your administrative assistant to fill out a form due to the district by Friday.
- 2) You need to co-plan next Monday's staff PD with your Assistant Principal.
- 3) You would like to research new ways to recruit teachers for next year's hiring season.

### **V. If You Need Improvement in Delegation and Maximizing the Use of Teams (E. Collaboration and H. Delegation)**

*Clearly delineate roles and responsibilities.*

Several of the articles (Marshall, Article 2; Baeder, Article 4; and Oncken and Wass, Article 5) mention *delegation* as an essential key in helping school leaders manage their time. However, part

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of why leaders don't delegate is that they don't have a clear enough idea of whose wheelhouse a task belongs in.

Take some time before the school year begins to meet with your leadership team and outline *the major responsibilities* of each school leader and each team at your school. For example, if there is a Green Team at your school, when the district outlines new recycling policies you can delegate these to the team rather than adding them to your responsibilities.

Use the chart below to map out all responsibilities. In addition, decide how the leadership team will divide up oversight for these responsibilities *and* how the rest of the school community will be informed of these responsibilities. (It will save a lot of time if parents go directly to the Green Team rather than schedule a meeting with you to discuss ideas to celebrate Earth Day!)

Person/ Team	Major responsibilities	Who from the leadership team will regularly check in with this person/team?	How will someone on the leadership team convey these responsibilities to the person/team and the school?
Seventh-grade math team	-Map out curriculum pacing maps -Provide support for struggling students during intervention time -etc., etc.	Math department chair	Math department chair will meet with the seventh grade math team once a month and will post a list of the team's responsibilities in the math department and on the school's website
Etc.			
Etc.			