

## DOCUMENT RESUME

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## ABSTRACT

This presentation outline with overheads demonstrates differentiated planning, a system with four separate planning methods designed to reduce confusion and increase staff commitment to planning efforts. Differentiated planning involves: (1) prioritization (used for single question issues, multiple question issues, and as a follow-up to the development of vision/mission statements); (2) research cycle (used when an answer probably exists somewhere else, when research that will surround the problem probably exists, and when teams need a quick, high-probability successful solution); (3) chainsaw planning; and (4) strategic planning (which is seldom used, but can be used at the beginning of a new leader's time in an organization). The paper discusses decision making strategies to increase staff buy-in; evaluation strategies for planning efforts; current research on effective team functioning; and improving team functioning (conflict resulting from: lack of focus; differing philosophies, processes, and practices; inappropriate interpersonal behaviors or inappropriate behaviors during conflict; varying perceptions regarding decision making, leadership, management, and supervision; and bad behavior). The paper also includes: research results on differentiated planning; differentiated planning worksheets and a matrix; sample vision and mission statements; and data on why teams fail and causes of school conflict. (SM)

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**NSDC@Atlanta.2000 - the future is here  
Tuesday, December 5, 2000 • 9:00 AM**

**A Set of Planning Tools for School Leaders & Teams:  
*Differentiated Planning***

## Abstract

This presentation will demonstrate *Differentiated Planning*; a system with four separate, easy to use planning methods that reduce confusion and increase staff commitment to planning efforts. The session will include:

- Four specific planning models for schools
- Methods to increase staff “buy-in”
- Decision-making techniques that reduce conflict among staff
- Evaluation strategies

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## About the Presenter...

**Dr. Bruce H. Miles** is the CEO & Owner of the Big River Consulting Group. For the past five years, he was an Assistant Professor in the College of Education at St. Cloud State University & taught coursework in the areas of leadership & administration. Bruce has served as a consultant to schools and districts for the past 12 years and is an author of articles, and a reviewer for journals and books.

Bruce works with schools, businesses and non-profit agencies across the United States and Canada, and specializes in the areas of:

- Data collection & analysis
- Strategic planning
- Organizational effectiveness
- Leadership training
- Behavior Management
- Data-based decision-making
- Reducing organizational conflict
- Workplace climate issues
- Personnel issues & decisions
- Special Education

He can be reached at (800) 500-7017 or [bruce@bigrivergroup.com](mailto:bruce@bigrivergroup.com)

## Orientation

9:00

- Introductions: Colleagues & Bruce H. Miles, Ed.D.
- Goals for today's session
  - 1) Review four specific planning models for schools
  - 2) Review methods to increase staff "buy-in"
  - 3) Review decision-making techniques that reduce conflict among staff
- Survey Results (overheads)
- Your prior experiences with planning an/or & teams in schools/districts?
  - 1) Good experiences?
  - 2) Less than...?
  - 3) Notice any trends?
  - 4) Quality indicators: Effective planning?

## Overview: Planning Models

9:10

- Effective Schools (handout #1)
- Differentiated Planning (handout #2) & planning models (overheads)
- Special note: Horizontal elements on the Johnson Planning Model
- Effective elements & processes within those models

## Why Planning is Hard for School Staff & Admin

9:15

- Teachers' predisposition toward a linear nature
- Uncertainty
- Perceived shortage of resources = a "scarcity philosophy"
- Lack of training, or lack of experience w/ successful planning
- Time issues

## ID Desired Session Outcomes

9:20

- Break out into small groups
- Identify desired session outcomes
- Large group - Review data from small groups

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## Shortcuts to Vision & Mission Statements

9:40

- **Vision Statements Describe:** (handout #3)
  - A) **An ideal organization**
    - “A top-ten University”
    - “The best restaurant in town: Your 1st choice for fine dining”
  - B) **Ideal Services**
    - “The University that provides unmatched customer service”
    - “The Restaurant that provides unmatched attention & service”
  - C) **Ideal Products**
    - “Producing flawless vehicles at a reasonable cost”
    - “A 200-pound buck hanging in a tree by 10:00 AM Saturday”
- **Mission Statements Describe:**
  - A) **What an organization will do**
    - “Provide an excellent education at an average price”
    - “Provide the best food and the best service in our area”
  - B) **What services will be provided**
    - “Make our customers’ lives easier by replacing all auto glass with no disruption in their work or home schedules”
    - “Need credit? Bad credit? We arrange loans for anyone”
  - C) **What products will be delivered**
    - “On-time delivery, every time”
    - “A deer hunt with flawless planning & attention to detail”
  - D) **How lives will be changed**
    - “Providing an exceptional environment & instruction, & first-class equipment to help our customers improve fitness”

## Simulation: Vision & Mission Shortcuts

9:50

- **Strategies for the development of vision or mission statements**
  - A) Surveys (for internal and/or external consumers)
    1. Sample prompts for vision statements
      - a. What will happen in our ideal world?
      - b. What would be the best that we could do?
      - c. How would our current consumers benefit the most?
    2. Sample prompts for vision statements
      - a. What will we do as an organization to get there?
      - b. What would our organization’s job description be?
      - c. What would be expected from a flawless organization?
  - B) Internal and/or external consumer session (30 mins, 40 people)

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- B) Internal and/or external consumer session (30 mins, 40 people)
- a. Break out into groups of 3
  - b. Review prompts from above section
  - c. Draft a statement
  - d. Post all visions
3. Each gets 4 dots; vote for statement(s) that look good

**Process Analysis, Q & A, Tips for Vision/Mission** 10:10

**Differentiated Planning Method #1: Prioritization** 10:20

- Differentiated Planning (handout #2)
- Uses
  1. Single question issues
  2. Multiple question issues (Behavior Audit overhead)
  3. As a followup to development of vision/mission statements
- Your experiences w/ prioritization?
- Issue noted by “Ostentatious High School”

**Simulation: Prioritization** 10:35

- Clay County Collaborative (handouts #4A & #4B)
- Purpose of this exercise: Use all participants’ knowledge & experiences to develop broad goal areas to deliver vision & mission (above)
- Small groups (break out by cards): Identify goal headings needed
- Large group: Review & prioritize small groups’ lists of goal areas

**Process Analysis, Q & A, Tips for Prioritization** 10:50

- The next steps in this process would be:
  - Small groups: Develop goals under each heading
  - Large group: Prioritize goals under each heading

**Break!** 11:00

## **Differentiated Planning Method #2: Research Cycle** 11:10

- Differentiated Planning (handout #2)
- Research Cycle Worksheet (handout #5)
- Uses
  1. When an answer probably exists somewhere else
  2. When research that will surround the problem probably exists
  3. When a team needs a quick, high-probability successful solution
- Your experiences w/ the research cycle as a planning tool?
- Warning: the cycle does not require specific timelines, responsibilities, etc.

## **Simulation: Research Cycle** 11:25

- Small groups (break out by cards): ID issues, problems that might be successfully investigated/ solved by use of the research cycle
- Large group: Review & prioritize small groups' lists of goal areas

## **Process Analysis, Q & A, Tips for Vision/Mission** 11:40

## **Coming Attractions (PM Session)** 11:50

- "Chainsaw" Planning (Differentiated Planning Method #3)
- Strategic Planning (Differentiated Planning Method #4)
- Increasing staff "buy-in" to planning efforts
- Why teams fail
- Causes of conflict in schools
- How to address & manage conflict in schools
- ID of, & dealing with difficult school staff

## **Big Break!** 11:55

- See you @ 2:45

**Welcome Back** 2:45

- PM session = 2 more planning tools & strategies to get staff to “buy in”

**Differentiated Planning #3: “Chainsaw” Planning** 2:50

- Problem ID & Sorting:
  - 1) 2 x 2 Outcome Diagnosis Grid (handout #6)
  - 2) Big Mountains/Little Mountains (handout #7)
- “Chainsaw” Planning (handout #8)

**Preliminary: Invite the entire group to identify & prioritize issues**

- Break into groups of 3 and...
  - “Identify all of the problems within this issue.”
- List all sub-issues in a central location, acknowledge when posted
- Prioritize problems, thank & dismiss large group

**Step 1: Admire the Problem** (5 minutes)

- Ask a goal group of 3 or 4 people to:
  - “Identify all of the sub-problems within this issue, & hurdles that will be in our way as we try to solve the problem.”

**Step 2: Developing a Goal** (5 minutes)

- Ask the small group to...
  - “Write a goal, in 20 words or less, in words that Joe & Josephine six-pack (or Joe & Josephine 7-11) will understand, that will wipe out as many of the issues or small problems as possible.”
- Caution: Many groups’ goals will be too specific and actually be objectives. Guide to a more global goal or “raise the bar”.

**Step 3: Developing Objectives** (10 minutes)

- Have them...
  - “Identify four steps necessary to reach our goal.”

**Step 4: Identify Needed Resources & Develop Timeline** (9 minutes)

- Ask the group to...
  - “ID necessary resources & a suggested timeline per objective.”

**Step 5: Identify How to Measure Progress** (5 minutes)

- Ask the team to decide on a...
  - “Quantitative measure” (Hard data: scores, \$, %, etc.); and/or a
  - “Qualitative measure: (Soft data: perceptions, attitudes, etc)

## **Simulation: “Chainsaw” Planning** 3:10

- Small groups (break out by cards):
  - 1) Quickly imagine a goal area from one of your schools
  - 2) Complete steps 1, 2, 3 (Admire, Goal, Objectives) on the matrix
- Large group: Review & prioritize small groups’ lists of goal areas

## **Process Analysis, Q & A, Tips for the “Chainsaw”** 3:30

## **Differentiated Planning #4: Strategic Planning** 3:40

- Large group: ID elements of traditional strategic planning
- Large group: ID timelines for traditional strategic planning
- Uses
  - 1) Seldom
  - 2) @ the beginning of a new Leader’s time in an organization

## **Process Analysis, Q & A, Tips for Strategic Planning** 3:50

## **Decision-making Strategies to Increase Staff “Buy-In”** 4:00

- The folly of “Consensus” & Miles’ Bell Curve Theory
- Decision-Making Techniques & “Consensus” Tools
- Separating the “Will do”, the “That’s OK by me”, & the “No way” types
  - A) Adhesive dots as prioritizers
  - B) Traffic cards as direction indicators (green, yellow, red)

## **Evaluation Strategies for Planning Efforts** 4:15

- Planning resources?
- Evaluate alignment (vision, mission, goals, objs., etc.)
- Evaluate team progress
- Evaluate products
- Evaluation: Can be a combination of
  - A) Quantitative
  - B) Qualitative
  - C) Calhoun, E. (1994). How to use action research in the self-renewing school; ASCD @ (703) 549-9110
- K.I.S.S.



**Current Research re: Effective Team Functioning** 4:25

- Why Teams Fail (& why some teams do very well) (handout #9)
- Difficult People (Stress Factors) (handout #10)
- Difficult People (Five Categories) (handout #11)
- My experiences with school teams in decline & growing teams

**How to Improve Team Functioning** 4:35

- 1) **Conflict Resulting From a Lack of Focus** (handout #12)
  - A) Review or develop a vision & mission
  - B) Improve school wide decision-making system
- 2) **Conflict Resulting From Differing Philosophies, Process & Practices**
  - A) Improve your planning system
  - B) Improve your school wide decision-making system
  - C) Locate & use “best practice” research as a guide
- 3) **Conflict From Inappropriate Interpersonal Behaviors, or Inappropriate Behaviors During Conflict**
  - A) Hold a local norming session; use & reinforce the results
  - B) Thomas-Kilmann Conflict Mode Instrument (800-759-4266)
  - C) Improve your school wide decision-making system
- 4) **Conflict From Varying Perceptions re: Decision-Making, Leadership, Management & Supervision**
  - A) The Leader’s Window (Beck & Yeager, 1994; Wiley)
  - B) Improve your school wide decision-making system
- 4) **Conflict From Bad Behavior**
  - A) Tell people to stop it
  - B) Use the positive grapevine
  - C) Read & apply
    - Whitaker, T. (1999). *Dealing With Difficult Teachers*. NY: Eye on Education
    - Buckingham, M. & Coffman, C. (1999) *First, Break All The Rules*. NY: Simon & Schuster
  - D) Apply “Differentiated Supervision”

**Closure** 4:45

- Comments or questions?
- Please fill out the evaluation & enjoy the rest of the Conference!

## Research Results: *Effective Schools*

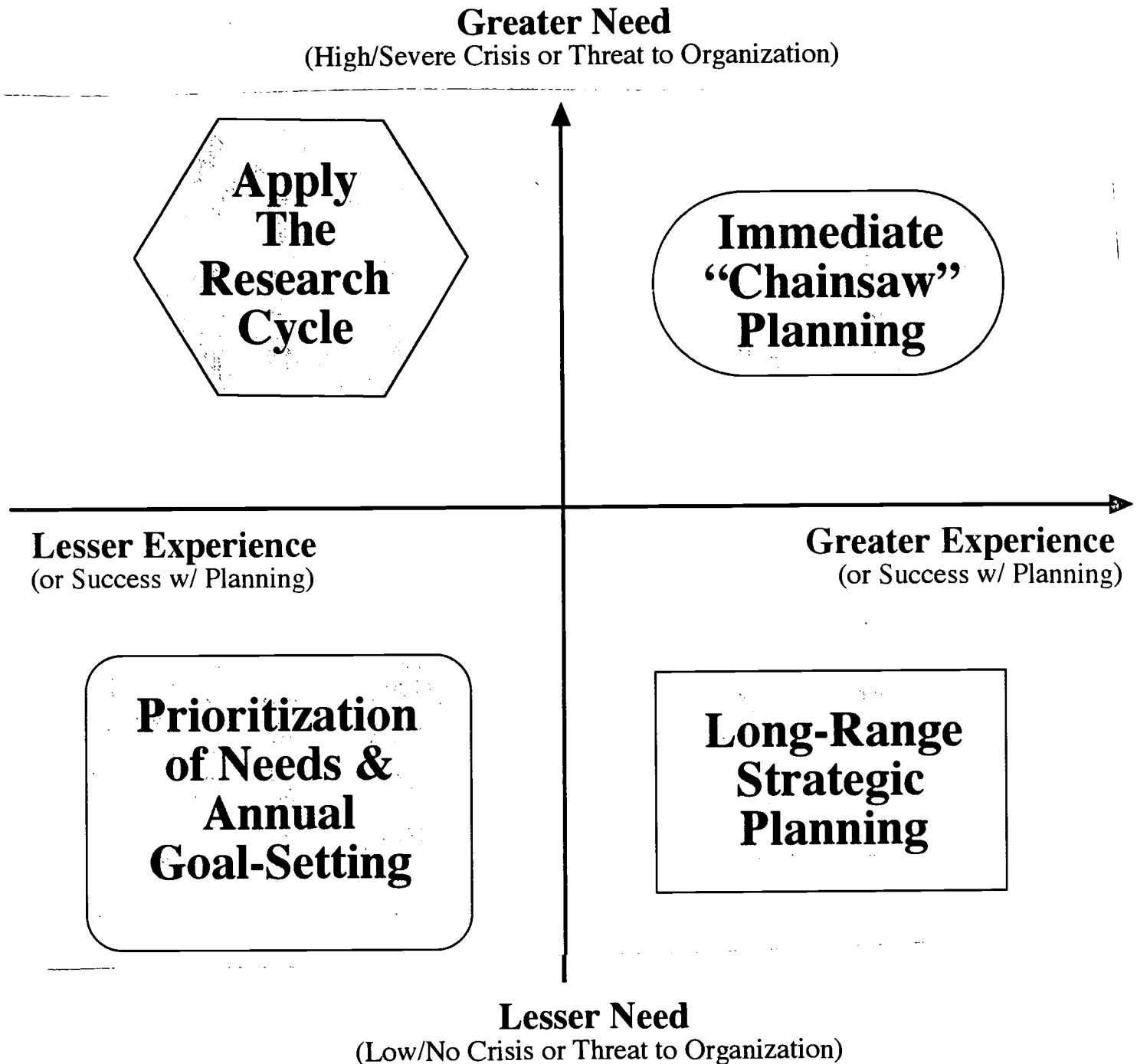
### Frequency With Which Variables Appeared in Effective-Schools Studies Groups

<b>Variable</b>	<b>Frequency of Appearance in the Three Groups</b>
<b>High Expectations</b>	<b>3</b>
<b>Safe &amp; Orderly Environment</b>	<b>2</b>
<b>Clear &amp; Focused Mission</b>	<b>2</b>
<b>Strong Leadership</b>	<b>2</b>
<b>Monitoring Student Progress</b>	<b>1</b>
<b>Staff Training</b>	<b>1</b>
<b>Staff Control Instructional Decisions</b>	<b>1</b>

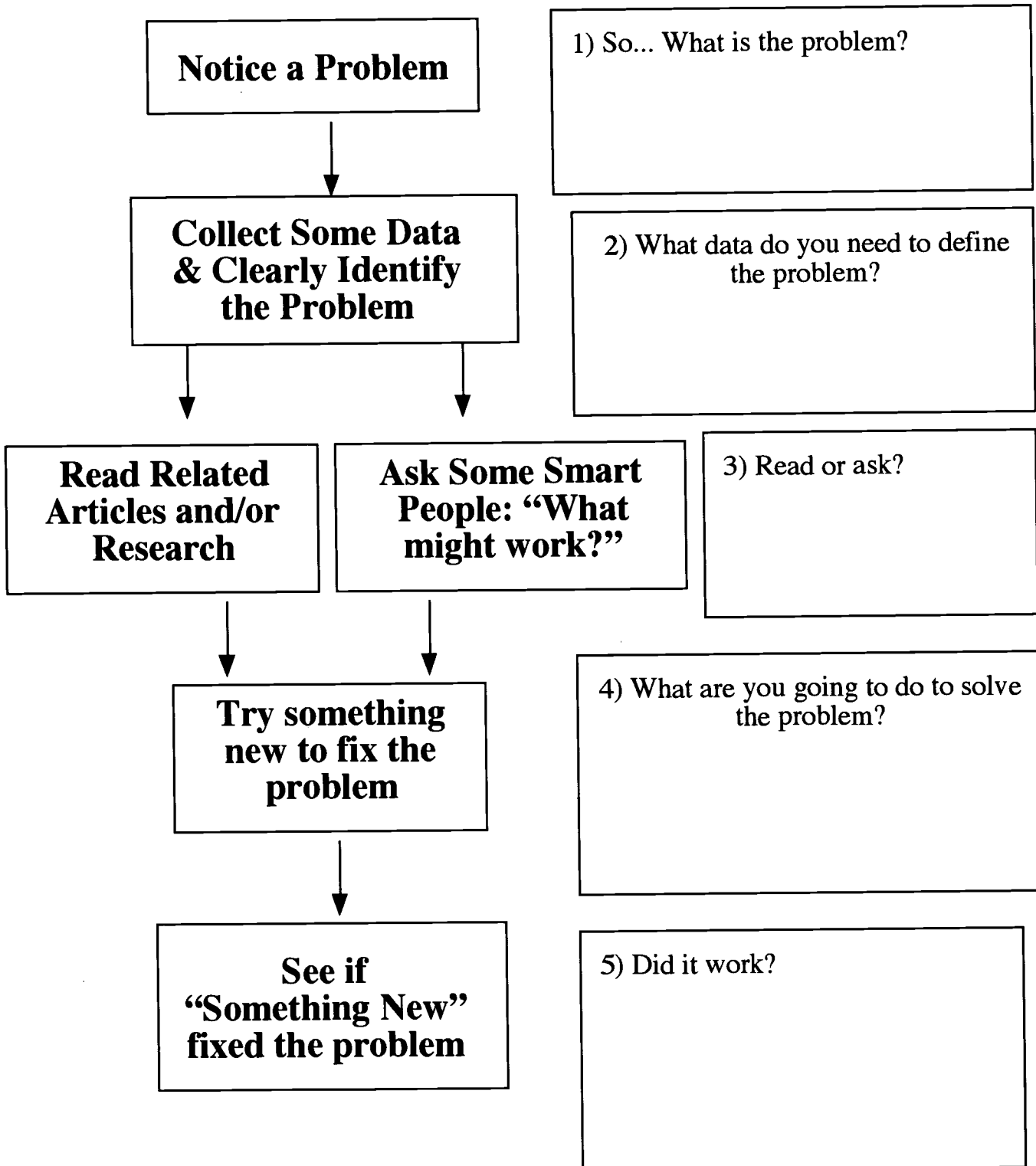
**Source:**

Rossow, L.F. (1990). *The Principalsip: Dimensions in Instructional Leadership*.  
New York: Prentice Hall. (Table 1.2 - Page 6)

## Differentiated Planning System



## Research Cycle Worksheet



**Planning Matrix**

**Evaluation Plan** (Quantitative and/or Qualitative; 5 minutes)

<b>Timeline</b> (per objective; 3 mins.)	<b>Resources</b> (per objective; 3 mins.)	<b>Responsibility</b> (per objective; 3 mins.)

**Objectives** ( $\leq 4$ ; 10 minutes)

**Goal** (in 20 words or less; 5 minutes)

**Admiration of the Problem** (ID all sub-issues & hurdles; 5 minutes)

## Sample Vision & Mission Statements

### Vision Statements Describe...

**A) An ideal organization**

“A top-ten University”

“The best restaurant in town: Your first choice for fine dining”

**B) Ideal Services**

“The University that provides unmatched customer service”

“The Restaurant that provides unmatched attention & service”

**C) Ideal Products**

“Producing flawless vehicles at a reasonable cost”

“A 200-pound buck hanging in a tree by 10:00 AM Saturday”

### Mission Statements Describe...

**A) What an organization will do**

“Provide an excellent education at an average price”

“Provide the best food and the best service in our area”

**B) What services will be provided**

“Make our customers’ lives easier by replacing all auto glass with no disruption in their work or home schedules”

“Need credit? Bad credit? We arrange loans for anyone”

**C) What products will be delivered**

“On-time delivery, every time”

“A deer hunt with flawless planning & attention to detail”

**D) How lives will be changed**

“Providing an exceptional environment & instruction, & first-class equipment to help our customers improve fitness”

## Clay County Joint Powers Collaborative November 17, 2000 • Planning Session

### ID Consumers & Prioritize Services

10:45

- 1) Break out by cards into small groups
  - ID consumers of the Collaborative's efforts
  - Large group: Prioritize responsibilities & review results

<u>Rank</u>	<u>Votes</u>	<u>Consumers of the Collaborative's Efforts</u>
1	13	Families and extended families
2	11	Children with mental health issues
3	7	Schools, staff, administration
4	6	Preschool children
5 (tie)	4	Children
5 (tie)	4	Children at risk

- 2) Break out by cards into small groups
  - ID services delivered as a result of the Collaborative's work
  - Large group: Prioritize services & review results

<u>Rank</u>	<u>Votes</u>	<u>Collaborative's Services</u>
1 (tie)	9	Prevention Services
1 (tie)	9	Community building to vision together and have less "turf" protection
3	7	Intervention Services
4	6	Truancy intervention

### Refining the Collaborative's Vision

11:15

- Review sample vision & mission statements (handout)
- Break out by cards into small groups
- Develop a vision statement (What will the future look like with very effective services in place within the Collaborative?)

*Community services will be effective and efficient in serving the needs of families and children; fully integrated and uniform; integrated funding...serving the needs of families and children.*

## Refining the Collaborative's Mission

12:30

- Break out by cards into small groups
- Use the Vision selected (AM) to develop a Mission (What will the Collaborative do over the next few years to deliver the Vision?)
- Large group: Prioritize vision statements

*To deliver integrated services through a "single point of entry" that incorporates shared information, funding and strategies for achieving outcomes.*

## Develop New Goals

1:10

- Small groups (break out by cards): Identify goal headings
- Large group: Review & prioritize small groups' lists of goal areas
- Small groups: Develop goals under each heading
- Large group: Prioritize goals under each heading

## Funding Priorities

<u>Votes</u>	<u>Goal</u>
15	Funding mechanism based on priority needs (non-competitive)
14	Funding plan for collaborative administration and infrastructure

## Single Point of Entry System

<u>Votes</u>	<u>Goal</u>
10	Helpworks with universal implementation and consumer access
9	Implement a strategic system-wide single point of entry service assessment tool that is family and agency friendly and cost-effective.



## Improve Communication

<u>Votes</u>	<u>Goal</u>
9	Develop a marketing strategy with the community (i.e., newsletters, ads in paper, web page, etc.
7	Recruit more parents to participate on Board & Advisory Committee

## ID Areas in Need of Service

<u>Votes</u>	<u>Goal</u>
6	Every three years do community survey on available services and gaps.

## Data Collection: Outcomes

<u>Votes</u>	<u>Goal</u>
7	Establish criteria for measurable outcomes.

## Identify Duplication of Services

<u>Votes</u>	<u>Goal</u>
14	One service plan per family crossing multiple discipline agency services.
10	Implementation of wrap-around process for children and families with complex needs and involved with more than once agency

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# Why Teams Fail

Although many say team-based pay is critical to the success of teamwork in the workplace, most teams fail for far less expensive reasons.

Why managers say teams failed to meet expectations:

<b>Goals unclear</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX 55%
<b>Changing objectives</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX 55%
<b>Lack of accountability</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX 51%
<b>Lack of management support</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX 49%
<b>Lack of role clarity</b>	XXXXXXXXXXXXXXXXXXXXXXXXXXXX 47%
<b>Ineffective leadership</b>	XXXXXXXXXXXXXXXXXXXX 45%
<b>Low priority of team</b>	XXXXXXXXXXXX 40%
<b>No team-based pay</b>	XXXXX 30%

(USA Today - Tuesday, February 25, 1997: The Hay Group)

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## Causes of School Conflict

### **Cause #1: Conflict Resulting From Lack of Focus**

#### Possible Remedies

- 1) Do/review/refine a shared Vision & Mission
- 2) Improve your schoolwide decision-making system
- 3) Improve link between philosophy & practice

### **Cause #2: Conflict w/ Philosophy & Practices**

#### Possible Remedies

- 1) Improve your planning system
- 2) Improve your schoolwide decision-making system
- 3) Locate & use “best practice” research as a guide

### **Cause #3: Interpersonal Conflict**

#### Possible Remedies

- 1) “Norming” Session: ID expected interpersonal behaviors
- 2) Individual nurturing of employees by staff & administration
- 3) Improve your schoolwide decision-making system

### **Cause #4: Conflict re: Leadership/Followership**

#### Possible Remedies

- 1) Identify expected leadership behaviors
- 2) Identify expected followership behaviors
- 3) Improve your schoolwide decision-making system

### **Cause #5: Conflict From Bad Behavior**

#### Possible Remedies

- 1) Tell people to stop it
- 2) Use the positive grapevine
- 3) Read & apply “Dealing With Difficult Teachers”
- 4) Differentiated supervision



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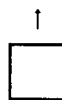
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