

Planning for Teachers – Made Easy
Author: Nemuel S. Fajutagana, MD, MHPEd
(Draft and not for distribution)

Introduction

“A day in a life of a teacher”

If one would ask a teacher what his or her typical school day is, the answer would probably be teaching, teaching, teaching... and more teaching. Most of us may probably give the same answer, and why not? We start our day preparing our lectures, acetates, PowerPoint® presentations, and then followed by classroom activities. A short lunch break and we are back to the classroom for another lecture or related activities or if not, we would probably be on our way to yet another committee meeting. And before the day ends, we would be busy preparing grades, answering e-mails, etc.

Looks very routine, but closer analysis would reveal that there is more than just ‘teaching.’ Being able to do all the tasks mentioned without getting lost requires good amount of planning and management. Giving a successful lecture, routine as it may be, would require that we go through all the management functions: Planning, Implementation, Monitoring, and Evaluation. Planning for a lecture would mean doing first a students’ need analysis. This process helps identify intended learning outcome and possible obstacles to learning. Once you have all the information, then you start organizing your content and finalizing delivery strategies. This is quite the same as what one would usually do in action planning. The rest of the comparison is shown table 1 below.

Table 1. Management functions in the context of giving lectures

Management Function	Analysis of task (lecture)
Planning	Conduct needs analysis Identify problem to be addressed Formulate target or objectives Analyze obstacles Prepare flow of lecture
Implementation	Conduct actual lecture
Monitoring	Get immediate reaction of students to the presentation Document problems encountered during the presentation
Evaluation	Outcome of lecture Solicit reaction from audience and colleagues Actual performance of students

If you are to do the same analysis to one of your ‘routine’ teaching task, I am sure you will be able to generate, if not the same, more number of tasks. Why not try doing one now? You may be surprised on what you will get.

Planning: The most important First Step

Planning is the most crucial of the management functions (well, that's my opinion). For what will you implement if you have no plan? What will you monitor when there are no defined objectives and key result areas? Where will you base your evaluation? (So, if you don't want to be evaluated later, do something unplanned! 😊)

Planning may indeed be a daunting task especially if you are preparing something really huge (e.g. **medium term plan (MTP) or strategic plan (SP)**). Plans like MTPs and SPs would require weeks or months of work even for seasoned program planners. And they have to, because these types of plan would have life spans of about 4 to 25 years!

For this particular material, our focus would be on preparing **short-term plans**; plans that may have lifespan of one (1) day to few weeks or even a year. However, let me remind you that short as your plans may be, their preparation would still require the same steps and tools used in preparing long term plans (see figure 1), except that you would just be dealing with smaller and probably much simpler problems or issues. Yes, problems and issues. We not only plan to solve problems (actually should be more to prepare for problems) but also respond to issues (may not be a problem for the moment but may soon be, if you don't act quickly enough).



Figure 1. Steps involved in the planning process

And by the way, amount of time spent in planning is usually much more than the amount needed to implement the plan. My point? Go figure.



Walk through..

Step 1: Problem Identification

We will now start with our 'learning as we walk through the step' approach to program planning. Our first step would be to the 'land of problems.' As you may have picked up from the preceding paragraph, planning starts with the identification of problems or issues. It is important that correct problems or issues are identified; otherwise you will be conducting activities that are inappropriate and therefore a total waste of time. To help us walk through is a case that I am sure you can relate to or relate with.

“Case Study”

During the last few months, your dean noticed a somewhat decreasing and deteriorating work output, among your teaching and non-teaching colleagues. Your dean asks for your help to resolve this problem without necessarily spending too much. Initial information coming in from you informal channels revealed that faculty members and administrative employees are suffering from very low job satisfaction due to burn out, fatigue and what they perceived as oppressive labor practices in your school.

The above scenario really looks daunting and it would not surprise me at all to know, for example, that the dean and other officials may just ignore the problem or offer very limited options for solving the problem. However, the key really to finding the right solution is identifying the right problem!

This brings us back to the first step of the program planning process, identifying the problem.

Going back to the case just presented, what would you think is(are) the major problem(s)? You can start by listing all the negative statements you can find in the case. (*because a problem is usually defined as something that is undesirable or discrepancy between ‘what is’ and ‘what should be’ and is usually stated in negative form.*)

My guess is that your list probably included the following:

1. Decreasing and deteriorating work output among teaching and non-teaching personnel.
2. Faculty and staff are suffering from low job satisfaction
3. Faculty and staff are suffering from burnout.
4. Perception of faculty and staff that school is oppressive.

Using the above list, it would appear that item 1 is the major problem (effect) while items 2-4 are possible causes. However, it is important that you be more precise in defining the major problem. In this case, you may have to be more accurate in describing 'decreasing' and 'deteriorating' work output. First, you may need to define work output in the context of teaching. Are the teachers not attending their respective classes? Are they not submitting required reports? Are they not participating in school related activities?

Cause and Effect/Fishbone Diagram
(Find and cure causes, NOT symptoms)

Why use it?

To allow a team to identify, explore, and graphically display, in increasing details, all the possible causes related to a problem or condition to discover its root cause(s).

What does it do?

- enables a team to focus on the context of the problem, not on the history of the problem or differing personal interests of team members.
- creates a snapshot of the collective knowledge and consensus of a team around a problem. This build support for the resulting solutions.
- Focuses the team on causes, not symptoms.

For the moment, let us just use the problem as defined by the dean - deteriorating work output. How do we now analyze the problem?

There are several problem analysis tools that are available and the most popular of course are the cause and effect diagrams. One popular example of cause and effect diagram is the fish-bone analysis.

How do I do it?

Select the most appropriate cause and effect format. There are two major formats:

Dispersion analysis type is constructed by placing individual causes within each "major" cause category and then asking of each individual cause "Why does this cause (dispersion) happen?"

This question is repeated for the next level of detail until the team run out of causes. The graphic examples shown in Step 3 of this tool section are based on this format.

Process classification type uses the major steps of the process in place of the major cause categories. The root cause questioning process is the same as the Dispersion Analysis Type.

Generate the causes needed to build a Cause and Effect Diagram. choose one method:

Brainstorming without previous preparation

Check Sheets based on data collected by team members before the meeting

Construct the Cause and Effect/Fishbone Diagram

Place the problem statement in a box on the right hand side of the writing surface.

Allow plenty of space. Use a flipchart sheet, butcher paper, or a large white board. A paper surface is preferred since the final Cause and Effect Diagram can be moved.

- Draw a major cause categories or steps in the produce or service process. Connect them to the "backbone" of the fishbone chart.

- Be flexible in the major cause "bones" that are used. In a **Production Process** the traditional categories are: **Machines** (equipment), **Methods** (how work is done), **Materials** (components or raw materials), and **People** (the human element). In a **Service Process** the traditional methods are: **(Policies** (higher-level decision rules), **Procedures** (steps in a task), **Plant** (equipment and space), and **People**. In both types of processes, **Environment** (building, logistics, and space), and **Measurement** (calibration and data collection) are also frequently used. There is no perfect set of number of categories. Make them fit the problem.

In school context, example of production process could be materials development, curriculum and instructional designing, testing and assessment, and recruitment. Service process would probably include teaching, advising, etc. I guess you can interchange the label because, personally, find it difficult to categorize some of our problems into either production or service.

Let us now, go back to our case. The problem is definitely not about production and therefore the best model to use is *a service process*. *You main bones at this point would now be something like this:*

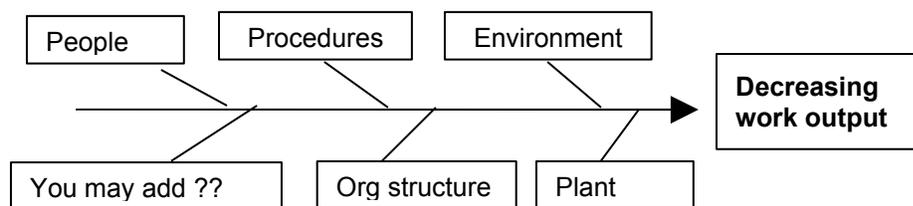


Figure 2. Fishbone Template

More brainstorming and you may probably come up with more information. Try adding more variables to the fish-bone below.

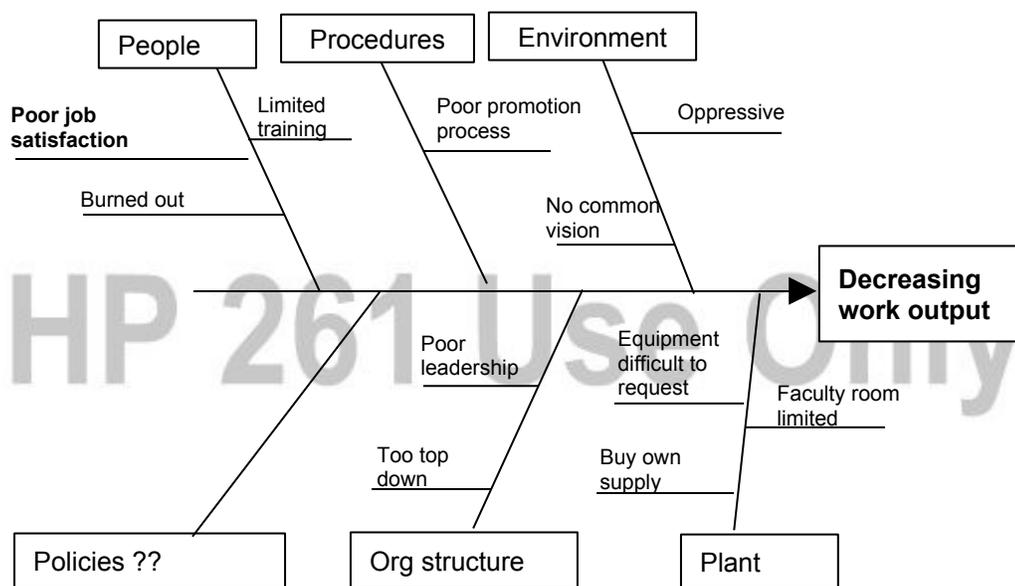


Figure 3. Sample Fishbone analysis of a school problem

*scenarios of course will defer depending on the institution where the analysis is being done.

As you invite more people to participate in the fish-bone process, it becomes more detailed.

Let us pause for the moment to review what we have so far accomplished.

- We were able to discuss what planning is all about and the process that are involved.
- We did a fishbone on a case presented. The bones are in no way complete but enough to get you started.
- Important points to remember:
 - To be able to provide the correct solution, one must be able to identify the correct problem.
 - Fish-bone is a good tool for analysis, but it is NOT the only tool available.
 - Ensure participation of stakeholders in problem formulation.

NEXT STEP:
Problem Prioritization

Step 1.1: Problem Prioritization

In step 1, we identified, using Fishbone, factors that probably contributed to the decreasing work output of your teaching staff. While all of the factors may have in one way or another caused the core problem, there would usually be one factor that is exerting most of the pressure and should be the priority in the program planning that will follow. Identifying this major cause is important (see inset).

How do we prioritize?

1. The first step is to prepare a list all the causative factors that you identified in the fishbone.
- 2.**List criteria that would be used for prioritizing the causes.
3. Prepare a matrix. Put in the first column the causes and in the remaining columns the criteria for judging.

Factor	Criteria				Total
	C1	C2	C3	C4	
F1					
F2					
F3					

Pareto's Principle - The 80-20 Rule

How It Can Help You
The value of the Pareto Principle for a manager is that it reminds you to focus on the 20 percent that matters. Of the things you do during your day, only 20 percent really matter. Those 20 percent produce 80 percent of your results. Identify and focus on those things. When the fire drills of the day begin to sap your time, remind yourself of the 20 percent you need to focus on. If something in the schedule has to slip, if something isn't going to get done, make sure it's not part of that 20 percent.

Manage This Issue
Pareto's Principle, the 80/20 Rule, should serve as a daily reminder to focus 80 percent of your time and energy on the 20 percent of you work that is really important. Don't just "work smart", work smart on the right things

<http://management.about.com/cs/generalmanagement/a/Pareto081202.htm>

- 4.**Assign weight to each cell. The weight can be based on the number of factors. A matrix with five factors should have a highest score of five and lowest of 1.
5. Total all the weights. Depending on how you assigned the weight, the factor with either the highest or lowest total score may be considered as the major cause and therefore the priority issue.

A sample problem prioritization matrix for factors causing Poor Job Satisfaction

Factors / Causes	Criteria for Prioritization			TOTAL
	Urgency	Capability to Respond	Resources	
Absence of faculty training	4	3	2	9
Poor Promotion Process	3	1	1	4
Poor faculty room condition	2	4	4	10
Burn out	1	2	3	6

(I used 4 as the highest rating and 1 the lowest. The priority cause will be the one that got the highest total rating)

If we are now to base our decision on the matrix, then our priority would be poor faculty room condition. It would seem now that this is an issue that the school leadership can immediately respond to without much difficulty. For the others however, they may require decision at the highest level of the hierarchy (e.g. Board of Directors).

Just a reminder: We are not turning down the other factors, we are just making decision as to what we would respond to first, based on urgency, organizational capability and resources that are available.

Now that we have prioritized the factor we want to address, we can now formulate our goals and objectives.

Step 2: Goal Setting and Objective Formulation

Let us go back one step and recall what we have identified as major problem and that would be ‘decreasing faculty output’ and we have identified as priority factor ‘poor condition of faculty room.’

All we have to do now is to convert our problem statement to a statement of goal (i.e. from positive to negative). So our main goal statement is now:

Goal: Increase Faculty Output by *%

What do we do with our priority cause now? We will convert it also to positive and would become one of our general objectives.

General Objective: Increase Job Satisfaction

Goals

Goals are specific accomplishments that must be accomplished in total, or in some combination, in order to achieve some larger, overall result preferred from the system, for example, the mission of an organization. (Going back to our reference to systems, goals are outputs from the system.)

Strategies or Activities

These are the methods or processes required in total, or in some combination, to achieve the goals. (Going back to our reference to systems, strategies are processes in the system.)

Objectives

Objectives are specific accomplishments that must be accomplished in total, or in some combination, to achieve the goals in the plan. Objectives are usually "milestones" along the way when implementing the strategies.

Tasks

Particularly in small organizations, people are assigned various tasks required to implement the plan. If the scope of the plan is very small, tasks and activities are often essentially the same.

Of course, the other causes would now constitute our specific objectives as follows:

1. An improved faculty room
2. Availability of faculty training
3. Presence of a comprehensive faculty promotion process

Note: A statement can be either a goal or objective depending on the level of implementation. For example, an increase job satisfaction may be the general objective at the system (school) level but could be the goal at the department level (e.g. human resource department), see Figure 4 below.

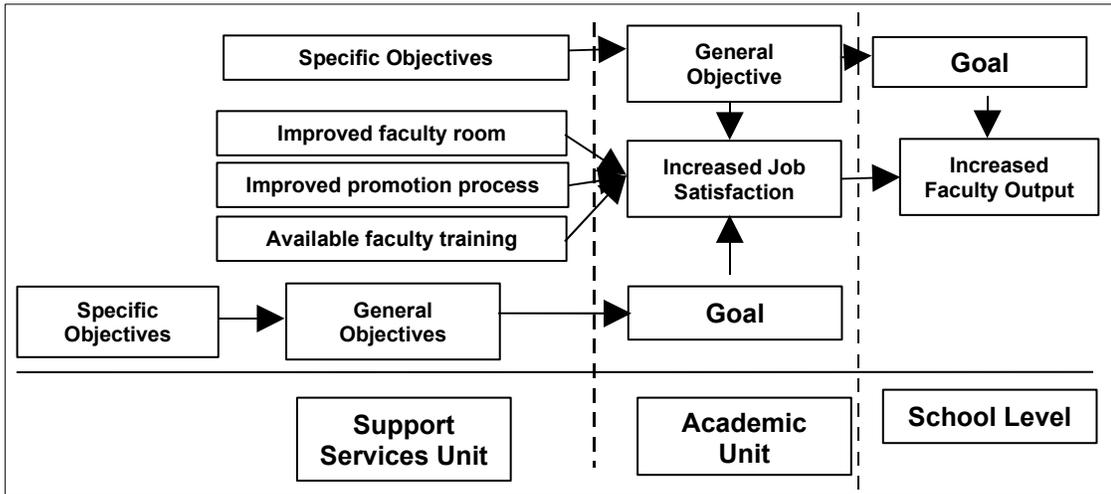


Figure 4. Statement of Goals and Objective according to level of implementation

👉 It is important that goals and objectives are stated properly. Most common acronym to remember in writing goals and objectives is SMARTER.

Box 1. Goals and Objectives Should be Smarter

SMARTER is an acronym, that is, a word composed by joining letters from different words in a phrase or set of words. In this case, a SMARTER goal or objective is:

Specific:

For example, it's difficult to know what someone should be doing if they are to pursue the goal to "work harder". It's easier to recognize "Write a paper".

Measurable:

It's difficult to know what the scope of "Writing a paper" really is. It's easier to appreciate that effort if the goal is "Write a 30-page paper".

Acceptable:

If I'm to take responsibility for pursuit of a goal, the goal should be acceptable to me. For example, I'm not likely to follow the directions of someone telling me to write a 30-page paper when I also have to five other papers to write. However, if you involve me in setting the goal so I can change my other commitments or modify the goal, I'm much more likely to accept pursuit of the goal as well.

Realistic:

Even if I do accept responsibility to pursue a goal that is specific and measurable, the goal won't be useful to me or others if, for example, the goal is to "Write a 30-page paper in the next 10 seconds".

Time frame:

It may mean more to others if I commit to a realistic goal to "Write a 30-page paper in one week". However, it'll mean more to others (particularly if they are planning to help me or guide me to reach the goal) if I specify that I will write one page a day for 30 days, rather than including the possibility that I will write all 30 pages in last day of the 30-day period.

Extending:

The goal should stretch the performer's capabilities. For example, I might be more interested in writing a 30-page paper if the topic of the paper or the way that I write it will extend my capabilities.

Rewarding:

I'm more inclined to write the paper if the paper will contribute to an effort in such a way that I might be rewarded for my effort.

Step 3: Selecting Strategies

At this point, let us review what we have achieved. We were able to identify the problem, prioritize the problem, and stated our program goals and objectives. Now that we know where we are going, the next question will be ‘how do we get there?’

Before you make decisions as to what strategy to use, it is important that you are first able to identify the forces that facilitate or hinder the achievement of your goals. One method you can use is Force-Field Analysis.

What is Force Field Analysis?

Force Field Analysis is a method for listing, discussing, and evaluating the various forces for and against a proposed change. When a change is planned, Force Field Analysis helps you look at the big picture by analyzing all of the forces impacting the change and weighing the pros and cons. By knowing the pros and cons, you can develop strategies to reduce the impact of the opposing forces and strengthen the supporting forces.

Forces that help you achieve the change are called "driving forces." Forces that work against the change are called "restraining forces."

Force Field Analysis can be used to develop an action plan to implement a change. Specifically it can .

1. Determine if a proposed change can get needed support
2. Identify obstacles to successful solutions
3. Suggest actions to reduce the strength of the obstacles

The Process

1. Draw a letter “T” on a flipchart
 - At the top of the T, write the issue or problem that you plan to analyze. To the far right of the top of the T, write your goal.
 - Brainstorm the forces that are driving you towards the goal. These forces may be internal or external. List them on the left side.
 - Brainstorm the forces that are restraining movement toward the goal. List them on the right side.
2. Prioritize the driving forces that can be strengthened or identify the restraining forces that would allow the most movement toward the ideal state if they were removed.

Let’s do it.

Low job satisfaction

high job satisfaction

Driving Forces →	← Restraining Forces
Commitment of management →→	←← attitude towards work
Available role models →→	←← low morale
Growing concerns about output →→	←← poor incentive mechanisms
Etc. →→	←← etc