

# Planning to Plan

workplace skills: planning, organizing & management

80 MINUTES



## TEACHING RESOURCES

- Bell ringer worksheet – one per student
- HDO #1 OR HDO #2: Planning to Plan Scenario – one per student
- Flip charts labeled:
  - Important & Urgent
  - Important, but Not Urgent
  - Not Important, but Urgent
  - Not Important and Not Urgent
- HDO #3: Time management: Covey's 4 Quadrant Decision Base (Lexile: 1360) – one per student
- Sticky-notes
- Writing Surface/PowerPoint Presentation

## DESIRED RESULTS

### Established Goals:

**SkillsUSA Framework Component:** Workplace Skills

**Component Essential Element:** Planning, Organizing, and Management - Designs, prepares and implements within a desired timeframe

### Common Core Standard(s):

CCSS.ELA-Literacy.RHST.9-10.9

Compare and contrast findings presented in a text to those from other sources (including their own experiments), noting when the findings support or contradict previous explanations or accounts.

CCSS.ELA-Literacy.CCRA.SL.3

Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric.

### Understandings:

**Students will understand that ...**

- Prioritizing tasks can help one become more efficient.
- A process can be used to tackle tasks at work.
- Before beginning a project, it is helpful to create a game plan that includes tasks, the timeframe, and the person responsible.

### Essential Questions:

- How do I go about prioritizing tasks?
- What is the difference between tasks being "urgent" versus "important?"
- How do I go about planning my week when faced with a long "to-do" list?
- What process can I use to help me become more efficient and complete a project in the desired time frame?

***Students will know...***

- The differences between “urgent tasks” and “important tasks”
- How to organize work
- A process that can be used in order to complete a project within the desire timeframe.

***Students will be able to ...***

- Define “urgent tasks” and “important tasks”
- Categorize tasks as urgent and/or important
- Describe how categorizing tasks as urgent and/or important can assist with work efficiency
- Develop a plan for a project including tasks, the timeframe, and the person responsible

## ASSESSMENT EVIDENCE

**Performance Tasks:**

- Graphic Game Plan

**Other Evidence:**

- Bell ringer
- Three-Column Journal
- Paired Review

## TEACHING/LEARNING PLAN

**Key Terms:**

- Urgent Tasks
- Important Tasks

**Differentiation:**

- When teaching the Graphic Game Plan process, establish stations for each step in the process. The stations can be led by more experienced students.
- If students do not complete individual projects, they can work within group to complete a project.

TIME	<b>LEARNING ACTIVITIES OUTLINE:</b> <i>Outline of instructional sequence taking place.</i>
<b>3 min</b>	<p><b>Bell Ringer:</b></p> <p>Post the bell ringer on a PowerPoint or on the writing surface. Students should respond to the bell ringer on their bell ringer worksheet.</p> <ul style="list-style-type: none"> <li>• “You’re hiring a new employee. One candidate is described as a ‘planner,’ the other is described as a ‘procrastinator.’ Which one would you hire? Why?”</li> </ul> <p>Ask two or three students to share their bell ringer response aloud.</p> <p>If needed, offer clarification on why a planner is preferred to a procrastinator in the workplace.</p>
<b>10 min</b>	<p><b>Interest Approach:</b></p> <p>Provide students with a copy of HDO #1 or HDO#2. This handout presents a scenario. After reading the scenario aloud, have students work individually to determine how they would tackle the tasks (approximately four minutes). Select which scenario students will use. HDO #1 presents a workplace scenario and HDO #2 presents a SkillsUSA scenario.</p> <p>Have students locate a partner and each share how they would approach getting the tasks completed (approximately five minutes).</p> <p>Ask for a couple of pairs to share with the class.</p>
<b>1 min</b>	<p><b>Preview Objectives:</b></p> <p>The following objectives should be posted for students to view:</p> <ul style="list-style-type: none"> <li>• Define “urgent tasks” and “important tasks”</li> <li>• Categorize tasks as urgent and/or important</li> <li>• Describe how categorizing tasks as urgent and/or important can assist with work efficiency</li> <li>• Develop a plan for a project including tasks, the timeframe, and the person responsible</li> </ul> <p>State the objectives to the students and offer any clarifications (if needed).</p>

24 min

## Understanding #1

Around the room, place four flip charts. Label the flip charts:

1. Important & Urgent
2. Important, but Not Urgent
3. Not Important, but Urgent
4. Not Important and Not Urgent

Divide students into four groups. Groups will write examples of daily tasks or activities that fall into that category. For example, for Flip Chart #4, write things done each day that are NOT important and NOT urgent. This could include watching hours of television, spending too much time on Facebook, or talking on the phone with their friends. Challenge each group to come up with at least three for each category.

As groups are writing on the first flip chart, offer assistance as needed. When two minutes is up, have the groups rotate to the next flip chart. Continue until all groups have written on each flip chart (approximately 8-10 minutes).

Hang the flip charts in the following order. Briefly discuss what was written.

<b>#1: Important &amp; urgent</b>	<b>#2: Important, but not urgent</b>
<b>#3: Not important, but urgent</b>	<b>#4: Not important and not urgent</b>

Write the definition of “urgent tasks” and “important tasks” on the writing surface or display it in a PowerPoint and have students capture the definition as notes.

- Urgent Tasks: Based on time
- Important Tasks: Based on values and goals

Provide clarification as needed.

Provide students with a copy of HDO #3 “Time management: Covey’s 4 Quadrant Decision Base.” Give students time to read the handout (6 minutes). While reading, have students complete a **Three-Column Journal**.

Divide a piece of paper into three columns and label the columns “notes, facts, and quotes,” “reflections and observations,” and “compare/contrast.” In the “notes, facts, and quotes” column, students capture notes from the text. In the “reflections and observations” column, students record their personal reaction to the reading, including any experiences they have had with the content. In the “compare/contrast” column, students compare/contrast the information with previous knowledge, text, or experiences.

After reading, have students make additions to the flip charts. Encourage them to add examples based on the reading. Refer to the definitions presented earlier and facilitate a discussion about the differences between “urgent tasks” and “important tasks.” Provide any clarification needed.

**14 min**

### **Understanding #2**

Draw and label the following matrix on the writing surface:

<b>#1: Urgent Tasks Important Tasks</b>	<b>#2: Not Urgent Tasks Important Tasks</b>
<b>#3: Urgent Tasks Not Important Tasks</b>	<b>#4: Not Urgent Tasks Not Important Tasks</b>

Divide students into groups of three and provide each group with a stack of sticky-notes. Refer students back to the ten tasks listed on HDO #1 or HDO #2.

Using tasks on HDO #1 or HDO #2, write one task on a sticky-note (10 total sticky-notes). Each group will decide where the tasks belong in the matrix (4 minutes). Next, we’ll place the sticky-notes (the tasks) in the appropriate cell. Once all sticky-notes are placed, have groups provide their rationale for their placement of the tasks (4 minutes).

Using a think-aloud process, walk students through the process of identifying the cells each task may fall into. Be sure to verbalize how those decisions are being made. **IMPORTANT NOTE:** There is no “right” answer for which cells the tasks fall into. The process is about helping students to clarify how they would prioritize tasks based on which is important and urgent.

Pair students as Partner A and Partner B for a **Paired Review**. Partner A will share something interesting from the process of identifying tasks as urgent or important. They will talk for 60 seconds, while Partner B listens. After 60 seconds, partners will switch roles. Partner B cannot repeat anything recalled by Partner A. Once this is completed, Partner A will have 40 seconds to continue the review. Again, they cannot repeat anything that has already been said. After 40 seconds, partners will switch roles again. Partner B cannot repeat anything recalled by Partner A. Follow the same pattern, now allowing each partner 20 seconds to recap.

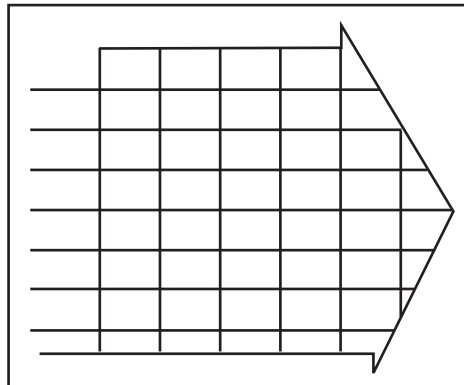
**18-20  
min**

### **Understanding #3**

Identify a project that students will complete in the classroom or laboratory. It should be an authentic project students related to their technical skill area (e.g. welder, plumber, IT technician, crime scene investigator, etc.). The project can be related to a unit of instruction within a class (i.e. a project that would normally be completed in the classroom or laboratory) or be a supplement to the information being taught. Select a project that may take several weeks to complete.

Before students begin working on the project, complete a graphic game plan. To complete a graphic game plan use the following steps:

1. On the writing surface or in a PowerPoint, post a picture similar to the following:



*Image resource: <http://www.gogamestorm.com/?p=636>*

2. Tell students the goal is to identify the tasks required to complete the project, the lead person responsible completing the task, and the timeframe associated with each task.
3. Label the first column "Week 1", the second column "Week 2-3", and the third column "Week 4-5." If the project will last longer than five weeks, add additional columns if needed.
4. Brainstorm the tasks required to complete the project and list them on the left side of the picture. As students are brainstorming tasks, include missing tasks that they do not identify.

	<p>5. Reference the definition of “urgent tasks” presented earlier. As a class, identify the timeframe in which each task needs to be completed. Place an “X” in the appropriate time-frame column.</p> <p>6. At this point, the master task list (along with the projected timeframe) has been identified. If the project will be completed as a class, assign one student to be the lead for making sure the task gets completed.</p> <p>Once the graphic game plan is completed, ask students the value using this process when beginning a school or work-related project. Ask students to think about how a graphic game plan would help with group accountability (i.e. making sure people complete the task they were assigned).</p> <p>Share examples of how this process can be utilized in the work place. Post the graphic game plan in the classroom or laboratory throughout the duration of the project. At the end of each week, check the game plan and make modifications as needed.</p> <p>As students work on individual projects, have them complete a graphic game plan before they begin. Make sure they refer to the graphic game plan at the beginning of each class period and make modifications as needed.</p>
<p><b>4 min</b></p>	<p><b>Review/Closure:</b></p> <p>Conduct the <b>A to Z Review</b> from SkillsUSA <i>Accelerate</i> (pgs. 14-15).</p> <p>Divide students into groups of four to five. Have groups list the alphabet vertically on a piece of scratch paper, and then have students think about key terms, concepts, or ideas from this lesson. They will write words that begin with the letters of the alphabet alongside the letter (4 minutes). Once completed, have each group quickly share their list with the group.</p>
<p><b>End of Year Evidence:</b></p> <ul style="list-style-type: none"> <li>• Graphic Game Plan for completed projects</li> </ul>	
<p><b>Extended Learning Application:</b></p> <p><i>What additional opportunities can be offered for the students to be equipped in exploring and experiencing the framework and standard(s) being taught through career readiness?</i></p> <p><i>How will students continue to practice the use of the skill or knowledge on their own?</i></p>	
<p><b>Extended classroom activity:</b></p> <ul style="list-style-type: none"> <li>• As students are working on projects in the laboratory, have them identify work goals at the beginning of each class period. This can be as a class discussion or a project-log can be used. At the end of each class period, have students refer to their goals and identify the progress made.</li> <li>• Have students keep track of their progress on a project using a blog. The blog should be updated at the end of each class period.</li> </ul>	



**SkillsUSA:**

- Before beginning a chapter activity, have chapter officers or committee assigned to the activity complete a graphic game plan for the activity. Post the game plan and use it to monitor progress towards completing the activity.
- After teaching this lesson, have students complete Level 1.3 in the Professional Development Plan (PDP) Student Workbook.

**Workplace:**

- Have students complete a graphic game plan for a career they are interested in pursuing. The graphic game plan should include milestones for education and training and the steps to reaching each milestone.
- Interview a local employer regarding the most complex project they've ever tackled. Ask them to explain the process they use to make sure they complete the work within the desired timeframe.

**References**

- <http://www.managementcentre.co.uk/knowledgebase/time-management-coveys-4-quadrant-decision-base>
- <http://www.gogamestorm.com/?p=636>
- *Accelerate, Effective Strategies to Enrich Student Learning*. SkillsUSA publication. Order at <http://skillsusa.org/store/>

# HDO #1

## Planning to Plan Scenario (Option A)

*Scenario: Before you left work on Friday, you created a list of 10 tasks that need to be completed/started within the next week. Now it's Monday morning, it's time to get to work! How would you go about getting the following tasks completed or started this week? Create your new to-do list by putting the tasks in order of what needs to be accomplished first. You will need to be prepared to share your rationale for how you ordered the tasks.*

1. Your timecard needs to be turned in by noon today.
2. You have a meeting with Human Resources at 10:00 a.m.
3. You need to make a PowerPoint Presentation for a meeting next week.
4. A budget is needed for a conference four months away.
5. There are four new voicemails that need listened to.
6. Materials need to be ordered for a conference taking place in six months.
7. Your team is ordering a new piece of equipment and research is needed on which one to purchase. The purchase has to be made in two weeks.
8. You have to approve the expense reimbursement of your four employees. The cut-off day is Friday.
9. Registration is due by 11:00 a.m. today for a conference. The conference is in two months.
10. You haven't checked your email for four days, and there are 110 new emails in your inbox.

## HDO #2

### Planning to Plan Scenario (Option B)

*Scenario: Before you left school on Friday, you created a list of 10 tasks that need to be completed/started for your leadership position within SkillsUSA. Now it's Monday morning, it's time to get to work! How would you go about getting the following tasks completed or started this week? Create your new to-do list by putting the tasks in order of what needs to be accomplished first. You will need to be prepared to share your rationale for how you ordered the tasks.*

1. The service activity flyers have to be to the printer by noon today.
2. You have an officer meeting after school.
3. You need to make a PowerPoint Presentation for the chapter meeting next week.
4. Your advisor needs information about the budget for a project next semester.
5. There are calls to return from sponsors of the Fall Leadership Conference.
6. The materials need to be ordered for a conference that is in six months.
7. Your team is ordering chapter t-shirts and research is needed where to purchase them. The t-shirt order has to be placed in two weeks.
8. You have turn an expense claim from purchasing candy for the chapter meeting. The cut-off day is Friday.
9. You have a scholarship application due by 11:00 a.m. today.
10. You haven't checked your e-mail for four days, and there are 110 new e-mails in your inbox.

## HDO #3

### Time management: Covey's 4 Quadrant Decision Base (Page 1 of 3)

Taken from: <http://www.managementcentre.co.uk/knowledgebase/time-management-coveys-4-quadrant-decision-base>

A key part of personal effectiveness is time management and prioritizing activities to achieve high pay-off results.

This article explains you be more effective. You'll discover the difference between efficient and effective and learn how to avoid devoting yourself to merely 'busy' work.

#### **Balancing the Urgent and Important: How to Be More Effective with Time Management**

Have you ever wondered why it is that, with all the advances in technology and communication in the workplace, we seem to get less done than before? And not only that, we seem to be more and more stressed about the things that we haven't got round to doing. We get swept away by a torrent of emails and attachments, knocked off course by interruptions and phone calls, and bogged down in the daily scramble to achieve more with fewer resources.

Most time management gurus have tried to convince us that we can somehow shoehorn more into our day, so enabling us to take on that other project, attend that urgent meeting or digest that important report.

By contrast, management guru Stephen Covey asks us to look at things in a different way. His key work, *The Seven Habits of Highly Effective People*, written 20 years ago, remains a bestseller and was voted the most influential business book of the 20th Century by Chief Executive magazine in the US. Covey suggests that, instead of focusing on getting more done (being efficient), we focus on getting more important things done (being effective). And therein lies the key to facing the challenges we all face in the not-for-profit sector of producing champagne results with beer resources, as the saying goes.

#### ***'Urgent' versus 'important' – what's the difference?***

We can characterize any activity we do in our day in terms of its importance and urgency.

An important task simply means one whose completion would significantly contribute to an individual's or organization's key aims and objectives. An urgent task is defined by Covey as one that 'appears to require immediate attention'. Note the word 'appears'. Somebody interrupts you at your desk with a question. The phone rings. A little window pops up on your computer announcing the arrival of yet another email. All of these place an immediate demand on your time, but they may not actually require your attention straight away. They are urgent... but are they important?

### **Quadrant 1**

The tasks outlined in this quadrant are both important and urgent, and typically this means panic or problems! This is the funding application that needs to be submitted today to meet the deadline, sorting out the server that's just crashed or dealing with a complaint from a key partner. All these things appear to require immediate attention and really do require immediate attention!

### **Quadrant 2**

These tasks are important but not urgent. Completing these tasks would make a significant contribution to your objectives, but you can easily get away with not doing them today (because they're not urgent). Tomorrow will be fine. Or even next week... So typically these tasks are about planning ahead, preventing problems before they happen, and building relationships with people (i.e. customers, colleagues, volunteers, or partners).

### **Quadrant 3**

These tasks are urgent but not important. To keep the 'p' theme going, Covey characterizes them as being proximate or popular. These are all things that aren't important but which come and get us, even if we're hiding in an office. Phone calls, emails, interruptions, reports landing in your in-box – anything which tries to grab your attention. And doing them often makes you popular, since people generally want you to give up your time just when it suits them. Conversely, saying 'no' can be hard and we fear it will make us unpopular.

### **Quadrant 4**

These tasks are neither urgent nor important. In Quadrant 4 we are idly surfing the web, flicking through magazines, chatting at the water cooler. It's pleasant in Quadrant 4... and the chance would be a fine thing!

### ***So how does all this help us?***

Are we supposed to be spending all our time planning and making sure we never read any magazines?

Not quite. Covey is a realistic kind of guy. He doubts whether most of us are spending much time at all in Quadrant 4. But this is where those other time management gurus would have us focus, filling every bit of downtime with worthy endeavor. "Waiting for a train? Then you've got space to digest the strategic plan!" We need to be realistic about the time we spend in Quadrant 1. The world's a messy place, and the world of not-for-profits is no exception. So with the best will in the world, we can expect to be putting out fires on a fairly regular basis.

The key to personal effectiveness is cutting back on the time we devote to tasks in Quadrant 3 and shifting that time to Quadrant 2 activities. So, rather than saying 'yes' to everything that comes along, challenge yourself to focus on the importance of what's being asked. In other words, it's all about 'exercising integrity in the moment of choice.' That means taking just a second before you choose to start a task to ask yourself, "is this the most important thing I can be doing right now? Or is it just the next thing?"

Covey argues that consistently spending even one percent more time in Quadrant 2 will start to have a significant impact on our lives. A bit more time thinking ahead and building relationships should help prevent crises from happening in Quadrant 1, allowing us more valuable time in Quadrant 2. And focusing on the important rather than just the urgent tasks can leave us with the lasting satisfaction that today we have made the biggest difference we could in our role. And isn't that why we work in this sector?