The Clareo Group

PLANNING *framework*

Your guide to planning for strategy over busy-ness.

Strategy over *busyness*

We love new activities in higher ed. We launch new programs. We kick off new initiatives. We form committees to run projects. We constantly add new work to our plates, often with the best of intentions, and usually hoping and expecting inspiring results.

We also do not love stopping projects in higher ed, so we accumulate work, projects, goals, reports...and that can feel like we're on an endless hamster wheel.

It doesn't have to be this way. The shift from being busy to being strategic is easier than it might look.

The process is straightforward, and one you may already be familiar with if you've been an instructor. I'll show you how to adapt BACKWARD DESIGN for planning your projects, goals, and initiatives: anything you're working on where you're trying to create real change and make meaningful impact.

This mini-workbook will guide you through the thinking, planning, and goal-setting that will help you move from feeling crazy busy to feeling focused and inspired, so you can feel accomplished and joyful in your work.

"THE ESSENCE OF STRATEGY IS CHOOSING WHAT NOT TO DO.

– MICHAEL PORTER.

By developing a plan that clearly identifies what TO do, you'll be able to clearly see what NOT to do.

The main shift you'll make in this process is this: you'll quit thinking about what activities and programs you want to start, and you'll focus on the single change you're trying to make and the assessments that will tell you whether you're making progress toward that change. Once you understand which assessments or measures will guide your progress, *then* you'll design your activities.

This doesn't mean you have to shelve all your fun ideas. It means you'll only pursue those ideas that contribute to the change you're trying to make.

01 CHANGE
Name the change you want to see or experience. What is the impact you want to achieve?

02 KEY METRICS
Decide what you can measure that will tell you whether you're making progress toward your desired change.

03 INTENTIONAL ACTIVITIES
Design activities that will lead to those measurements.

PLANNING
framework

PLANNING

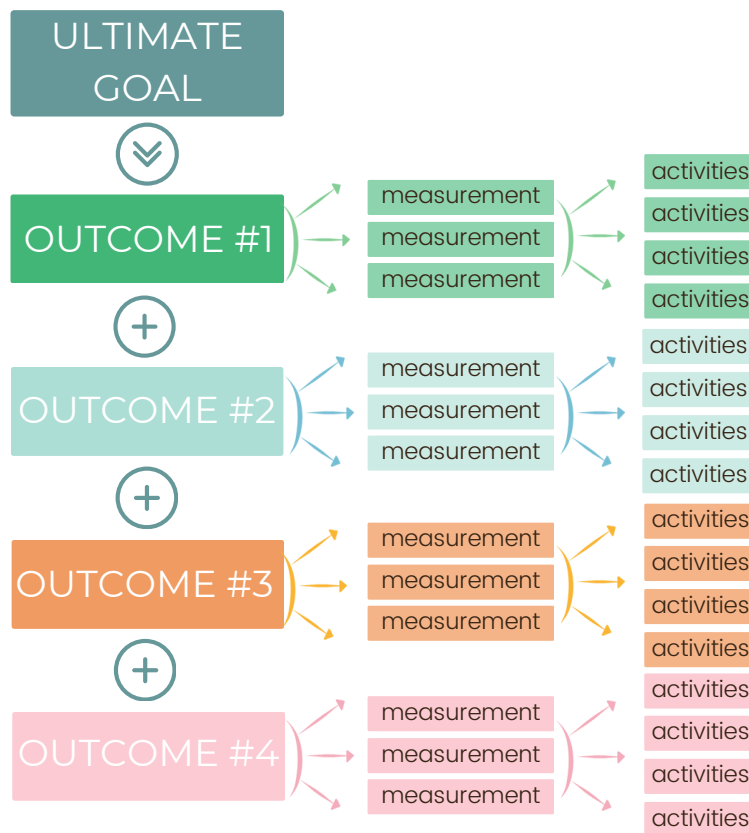framework

PLANNING

For planning, you'll follow the basic process of backward design. Start with your **ultimate goal**: what you want to see or experience as a result of your work. Then identify what needs to be different from the current state in order for you to reach that goal; these are your **outcomes**. Next, decide what measurements will guide your progress toward your outcomes; these are your **benchmarks**. Once you know what to measure, only then do you design **activities**, programs, projects, or processes that will create the context for your benchmarks, guiding you toward achieving each outcome as a part of your ultimate goal.

ULTIMATE GOAL		
OUTCOME #1	measurement / measurement / measurement	activities / activities / activities / activities
OUTCOME #2	measurement / measurement / measurement	activities / activities / activities / activities
OUTCOME #3	measurement / measurement / measurement	activities / activities / activities / activities
OUTCOME #4	measurement / measurement / measurement	activities / activities / activities / activities

THREE KEYS TO SUCCESS

Identify the 3-4 changes that are necessary to produce the result you're after. Those 3-4 change should produce your desired outcome.	Measure what matters: your outcomes. Avoid useless busy-ness by measuring results, not participation or time-on-task.	Be vigilant with your energy! Engage only in activities that produce the assessments you need. Don't be busy for the sake of busy-ness.

PLANNING
vs. implementing

PLANNING VS. IMPLEMENTING

In backwards design, you plan from the end result and work your way backward to daily activities.

But when you implement your design, you'll work in reverse order: you start with the activities, and then measure as go you (and course-correct as needed) until you've achieved the change you want.

HOW YOU PLAN

ULTIMATE CHANGE	ESSENTIAL OUTCOME	KEY METRICS	PRODUCTIVE ACTIVITIES

HOW YOU IMPLEMENT

PRODUCTIVE ACTIVITIES	ONGOING ASSESSMENT	PROGRESS TOWARD OUTCOME	ULTIMATE CHANGE

PLANNING
Ultimate Goal

| ULTIMATE GOAL | ⟶ | The *why* of an Ultimate Goal |

ULTIMATE GOAL

OUTCOME #1 → benchmark / benchmark / benchmark → activities...

OUTCOME #2 → benchmark / benchmark / benchmark → activities...

OUTCOME #3 → benchmark / benchmark / benchmark → activities...

OUTCOME #4 → benchmark / benchmark / benchmark → activities...

The *why* of an Ultimate Goal

In backward design, goals are focused on **what will be different** as a result of your work. Goals do not describe the work itself. This approach requires laser focus on the impact, or change, we're trying to make, and moves us away from thinking of goals as activities. Staying focused on the impact or change we are trying to make is key to shifting our attention away from busy-work and toward measurable assessments of progress.

Here are some examples of goals that encourage busy-work vs. ULTIMATE GOALS that focus on impact:
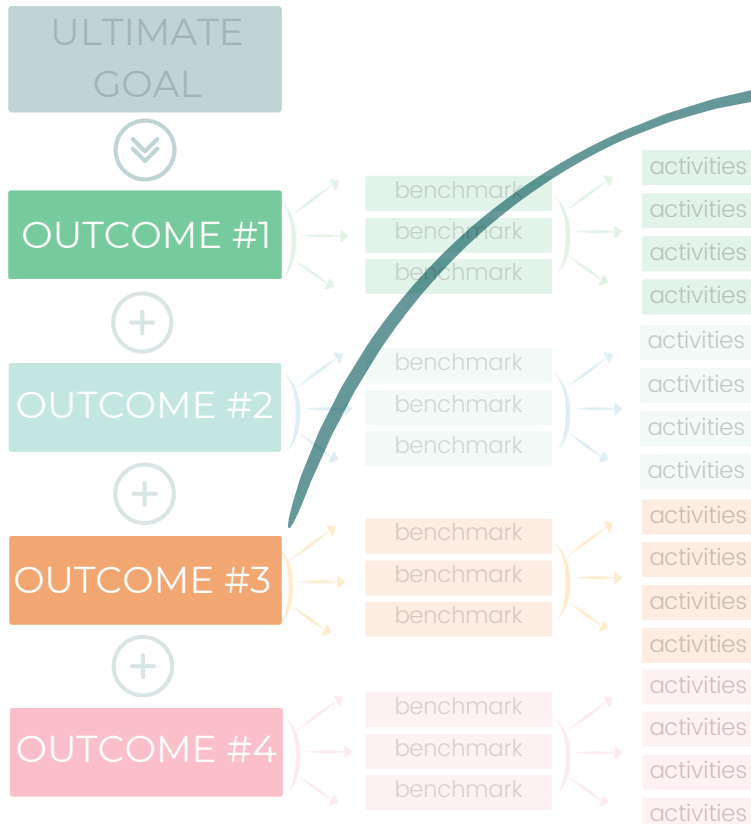
BUSY-NESS

>> Become student-ready

>> Increase faculty diversity

>> Reduce staff turnover

IMPACT

>> Reach and sustain 77% FY retention.

>> Achieve 50% racial diversity in all faculty categories.

>> Increase job satisfaction on annual climate survey by at least 30 points.

PLANNING
Outcomes

ULTIMATE GOAL

OUTCOME #1

OUTCOME #2

OUTCOME #3

OUTCOME #4

benchmark
benchmark
benchmark

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benchmark
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benchmark

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The *why* of OUTCOMES

Outcomes are puzzle pieces that lead to your ultimate goal. Think about this from a teaching perspective: if the ultimate goal is for students to demonstrate a skill, what are the puzzle pieces that, when put together, show you the student has gained that skill?

Once you know your outcomes you can begin to design your benchmarks so you know you're always moving closer to them.

Here are some examples of how one of those sample Ultimate Goals can be used to develop Outcomes. *Note: these examples are for illustrative purposes only.*

ULTIMATE GOAL

>> Achieve 50% racial diversity in all faculty categories in 8 years.
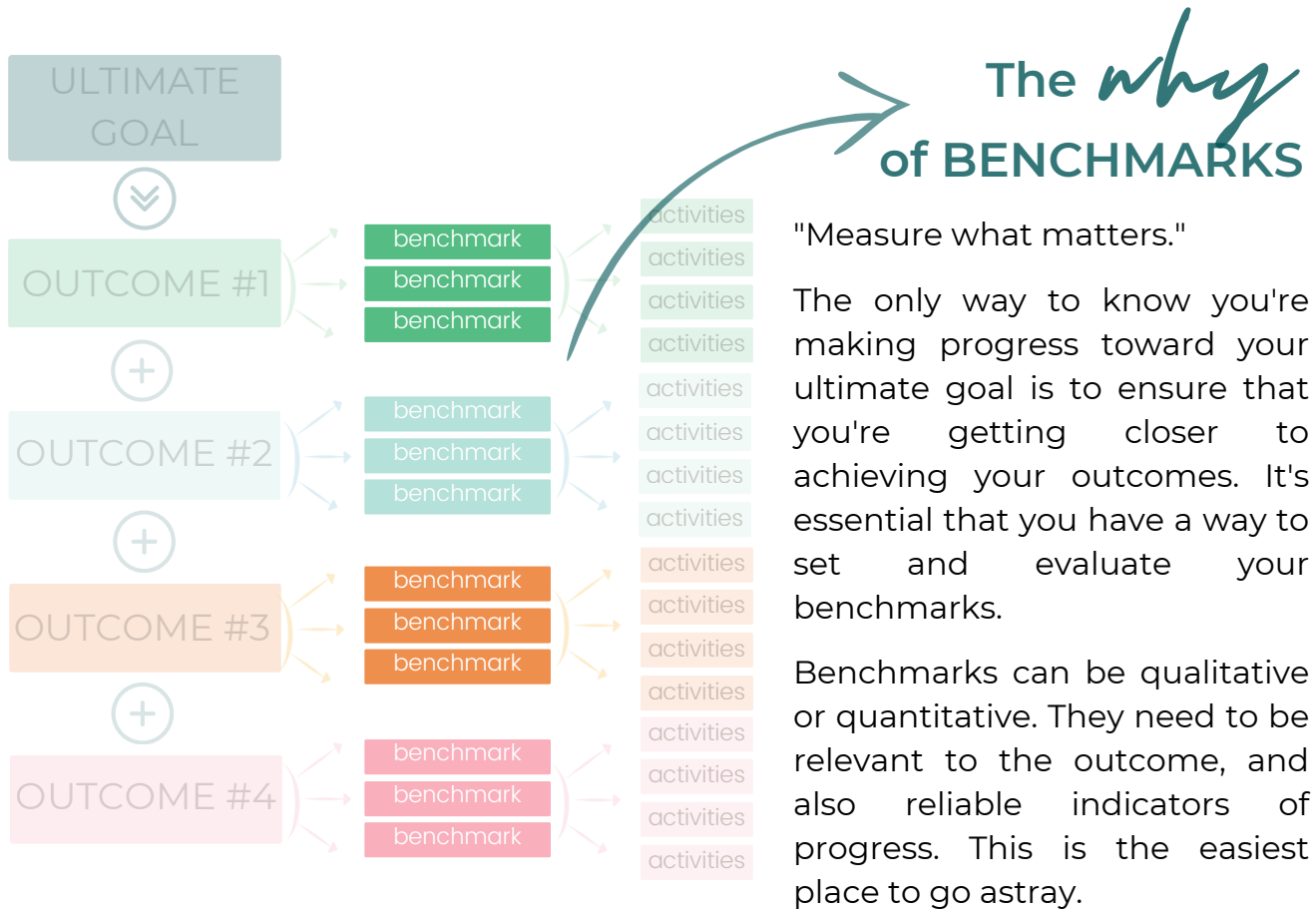
POTENTIAL OUTCOMES

>> Understand baseline hiring needs over the next five years

>> Implement a hiring plan that exceeds the 50% target

>> Address departmental cultural issues that create hostile environments for historically excluded faculty

PLANNING
Benchmarks

ULTIMATE GOAL

The *why* of BENCHMARKS

OUTCOME #1 → benchmark / benchmark / benchmark → activities...

OUTCOME #2 → benchmark / benchmark / benchmark → activities...

OUTCOME #3 → benchmark / benchmark / benchmark → activities...

OUTCOME #4 → benchmark / benchmark / benchmark → activities...

"Measure what matters."

The only way to know you're making progress toward your ultimate goal is to ensure that you're getting closer to achieving your outcomes. It's essential that you have a way to set and evaluate your benchmarks.

Benchmarks can be qualitative or quantitative. They need to be relevant to the outcome, and also reliable indicators of progress. This is the easiest place to go astray.

Here is an example of how Outcomes can help you set guiding benchmarks: *Note: these examples are for illustrative purposes only.*

POTENTIAL OUTCOME
>> Implement a hiring plan that exceeds the 50% target

BENCHMARKS
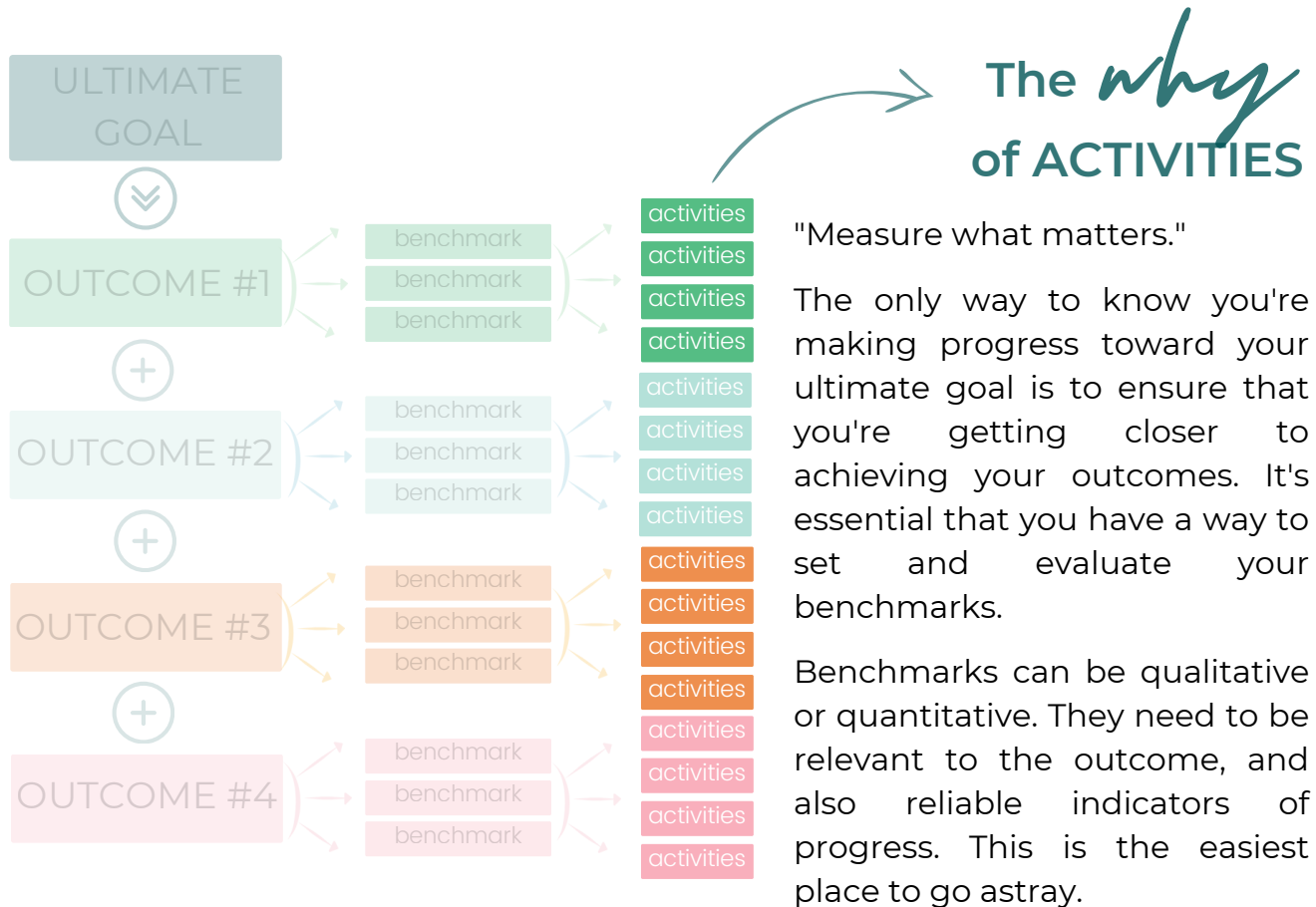>> Year 1: Conduct audit to understand current state.

>> Year 1: Set overall target #s for hiring.

>> Year 1: Break overall target #s into Year 2, Year 3, Year 4, Year 5.

>> Year 2: Hit Year 2 goals.

PLANNING
Activities

ULTIMATE GOAL

OUTCOME #1 → benchmark, benchmark, benchmark → activities, activities, activities, activities

OUTCOME #2 → benchmark, benchmark, benchmark → activities, activities, activities, activities

OUTCOME #3 → benchmark, benchmark, benchmark → activities, activities, activities, activities

OUTCOME #4 → benchmark, benchmark, benchmark → activities, activities, activities, activities

The *why* of ACTIVITIES

"Measure what matters."

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Benchmarks can be qualitative or quantitative. They need to be relevant to the outcome, and also reliable indicators of progress. This is the easiest place to go astray.

Here is an example of how one sample Benchmark can guide your development of Activities. *Note: these examples are for illustrative purposes only.*

BENCHMARK

>> Year 1: Conduct audit to understand current state.

ACTIVITIES

>> Create HR/IR task force to pull data and report on current state.

>> IR director shares report with faculty senate and academic affairs leadership

>> Chairs, directors, and deans discuss opportunities and approaches to shaping hiring for next ~5 years.

PLANNING

Let's Go!

CREATE YOUR PERSONALIZED PLAN:

PLANNING *framework*

APPLICATION

Apply this planning framework to any of your team's projects or initiatives. It works equally well when setting a multi-year agenda for a complex department as it does for preparing a single activity.

What opportunities for planning are on your horizon?

- Collaboratively planning a department's new priorities after a leadership transition

- Setting budget priorities for 1 year, 3 years, or a 3-5 year window

- Preparing for a purposeful single event, such as a summit or short conference

- Establishing a workplan for a task force, project group, or committee

- Developing a strategic plan -- for a full campus, a functional area (eg, student affairs) or a single department

- Designing a program of professional development (rather than single events) for your community

REMEMBER:

Focusing on the measurements that will produce your outcomes gives you clarity about what to say YES and NO to. This clarity can guide you in reporting your progress, managing workloads, and allocating resources.

PLANNING *affirmations*

Inspiration to link your leadership to your planning.

The essence of strategy is choosing what not to do.

--Michael Porter

Some leaders are born women.

-- Geraldine Ferraro

Working on the right thing is more important than working hard.

-- Caterina Fake

What you do makes a difference, and you have to decide what kind of difference you want to make.

-- Jane Goodall

about carole
HI THERE!

Planning is my superpower.

I learned backward design as a teacher and saw its power as part of faculty development. I've seen backward design deployed across sectors and in a variety of projects, from developing a university's strategic plan to designing the outcomes for a task force.

When I was running a nonprofit and was inundated with requests to start new projects and initiatives, I learned that the key to success lay in the assessment. Assessing our progress helped us quit running around being busy busy busy with few results to show for it.

This framework is now foundational to The Leadership Academy. I'm so excited to share it with you!

Are you ready?

Carole Chabries, PhD
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IT TAKES AS MUCH ENERGY TO WISH AS IT DOES TO PLAN..
– ELEANOR ROOSEVELT