Rules Over Tools:
Create Your Ideal Week

■ As dedicated teachers we will always work long hours, but it *can* get easier. If you're intentional about how you use your time each week, more minutes will materialize. It may sound crazy but as someone who taught and who has worked with hundreds of teachers—from the most novice to the most experienced—I know it is possible to balance the professional with the personal. There are teachers who plan and execute awesome lessons and find time to train for a marathon. It requires discipline and diligence—and may not feel natural at first—but it will increase your effectiveness and make your life easier. I promise.

IT *CAN* GET EASIER—A STEP-BY-STEP APPROACH

Often we teachers are not as intentional as we should be because we fall back on easily available excuses: "My day is just planned for me by someone else" and "I have no free moments for the entire day." This is true: for the most part our days *are* dictated by others' demands. That said, there are large chunks of time (before and after school, during preparation periods and hallway transitions) when all of the other work outside of executing excellent lessons can get done. As Nilda, a middle school English teacher, says, "There are a lot of distractions to the main 90 percent of my job—which is to design and execute excellent instruction every day. The massive amount of information that comes my way can easily take my eye off the main goal, and anything that can streamline [my work] can only help kids." People assume that professionals know how to plan ahead, get organized, and sort through the daily deluge. And we assume that some people are born magically organized and that for others it is a lost cause. I'm here to tell you that organization is a learned skill that can fundamentally help you focus on the main 90 percent of your job that Nilda mentions.

Reflection Questions:

What tools or habits do you currently employ to stay organized?
What already works well?
Where do you need to improve?

I'M NOT A DICTATOR, BUT THERE ARE *SOME* RULES

Remember I said we are creating a personalized organization system to meet *your* specific needs? Well, we are, *except* for a few critical commandments that must be followed—no matter whether your personal organization system is an index card in your shirt pocket (yes, this was done by someone I used to date, and proved highly effective for prioritization), an incredibly detailed paper-based Franklin Covey planner (Franklin Covey is a popular brand of planners sold in most office supply stores), or a carefully synchronized iCal (iCal is a personal calendar application made by Apple). Before we dive in, let's review the *Rules.*

The Rules

1. Get everything in one place.
2. Take it with you.
3. Write everything down.

4. Make it bite-size.

5. Keep like items with like items.

6. Create a trigger for what you put away.

7. Mind your energy levels.

8. No tool is forever.

9. Own your schedule.

10. Pause to plan.

Reflection Exercise

Take out your personal organizational tools and habits and rate them against the following rules:

Rule 1: Get everything in one place. People tend to keep the things they need to do in disparate places: we have one notebook for meetings, one for ideas, an online mechanism for tracking tasks, as well as one or two electronic calendars. We have an abundance of systems—too many tools telling us what we need to do. As much as you possibly can, keep your tools in as few locations as possible. This means everything should sync to your smartphone or everything should be in one folder. You don't want to carry around a phone, laptop, two folders, one clipboard, and two legal pads to deal with all of your to-dos.

Reflection Question:

In how many places do your to-dos currently live?

Rule 2: Take It with You. You are on your feet in your classroom and moving through the hallways of your school all day. Whatever tools you use to stay organized, you must have them on you at all times. Whether in a staff meeting, parent conference, or your classroom, you want to have a copy of your calendar and to-do list with you so you can record any to-dos that fly your way in the moment. For most teachers I recommend carrying no more than two tools around with you at all times. For some this may be a smartphone and a clipboard. For others it may be a binder and a notebook.

Reflection Question:

When another teacher asks you to do something as you walk down the hall, do you have a place to record your next step?

Rule 3: Write everything down. I want you to write everything down so you can empty your brain and focus on the hard work of teaching your students, and so you don't waste energy and time trying to remember and re-remember what you need to do. This concept is nothing revolutionary but it was made popular by David Allen, author of *Getting Things Done*. I don't want you to experience that dreaded feeling in the middle of teaching when you think, "Holy *&%, I forgot to [insert your own missing deadline story here]." I don't want you to have an idea of how to improve a lesson for the coming year and have nowhere to write it down. I don't want you to lose credibility with your students because you said you would give an extra-credit assignment but failed to follow through because you forgot.

Reflection Questions:

Do any of your to-dos live in your head?
When you have an idea for a colleague, what do you do with it?

Rule 4: Make it bite-size. Many to-dos get stuck because it is not explicitly clear what needs to be done. To avoid a to-do traffic jam, break tasks down as much as possible. Instead of writing "field trip" on your list, write "Call bus company to make field trip reservations." It may make your to-do list feel longer, but ultimately it will articulate an aim for those five extra minutes you squeeze out of your prep period. David Allen calls this making to-dos "actionable." This will help you avoid procrastination and make strides toward bigger, more important projects.

Reflection Question:

When do your to-dos get stuck? Think of one to-do currently on your list (or in your head!) and consider how you would break it down into steps.

Rule 5: Keep like items with like items. A lot of old-fashioned to-do lists fail because people keep big to-dos, small to-dos, short-term to-dos, long-term to-dos, and personal and professional to-dos tied together in one place. This approach is wonderful because everything is written down (see Rule 3), but it is far from the ideal because the jumbled nature of your to-dos makes it hard to scan your list and pick out the right thing to do at the right time. Eventually those long-term to-dos stop getting recopied each day and it becomes impossible to pick out what to do when. Assembly

lines are efficient for a reason. It doesn't make sense to make your lunch for work every single morning as you are racing out the door. It doesn't make sense to run to the copy machine three times per day. When I was teaching I would make five peanut butter and jelly sandwiches on Sunday evening and stick them in the freezer.

Reflection Questions:

Does your organization system distinguish between short-term (today!) and long-term (in a few months . . .) to-dos?

Is there anything you can batch process, like my peanut butter and jelly sandwich example?

Rule 6: Create a trigger for what you put away. Although it is easy to innocently set down a stack of papers on your desk or file an e-mail carefully in a folder, you should remember—anything you "put away" has a way of never coming back to you. If you want to file papers, e-mails, or other items that truly require action, jot yourself a note within one of the organization tools we discuss in later chapters about where you put those papers or e-mails and when you plan to return to them. Then you won't find yourself scrambling through the pile of mail at home looking for the wedding RSVP card or using the search feature of your e-mail in-box in creative ways for that article you *had* to read!

Reflection Question:

What papers, e-mails, or other items do you have buried on your desk or in a file cabinet that you wish you had time to return to?

Rule 7: Mind your energy levels. Have you ever tried to write a unit plan when you were incredibly tired? Or found yourself grading relatively simple student work when you were most alert? This book encourages you to mind your energy levels and perform your hardest work when you are most alert and focused. Tony Schwartz, author of *The Power of Full Engagement,* thoughtfully describes how professionals need to manage their energy like Olympic athletes. Save the smaller, mindless to-dos, such as making charts and posters, for when your brain is fried. If you know you cannot get anything done right after lunch duty, reserve that time for making copies so that your low-energy time is not entirely wasted. Do the big stuff, such as lesson planning, unit planning, or data analysis, when you are most awake and energetic.

Reflection Questions:

When do you do your hardest work that isn't teaching, such as writing lesson plans or grading those end-of-term essays?

Are there times when it takes you longer to get something done?

Rule 8: No tool is forever. Your job will change constantly. The organization system that worked in your last nonteaching job or in college is unlikely to hold up under the demands of being a teacher. If you are just starting out in this profession, you may have graduate school or certification responsibilities to juggle. If you are further along in your career, you may have to balance department-head duties with your teacher-coaching obligations. Regardless of the responsibilities on your plate, you must consistently adjust your system to meet your ever-evolving roles and responsibilities.

Reflection Questions:

What organization systems have you already tried? What has worked about them? Not worked?

Rule 9: Own your schedule. There are certain things you have to do every day, week, and month. They should not routinely take you by surprise and force you to stay up until 2 AM to complete them (let's save that scary situation for *real* emergencies, which hopefully will become few and far between). Grading, planning, and progress reports are known events. Why not reserve the time for them now? This step will ensure that the known work doesn't creep up on you, and it will help you pace the work to meet looming deadlines, such as progress report completion or unit plan writing. Let's make sure your calendar holds not only important deadlines but also your priorities.

Reflection Questions:

How do you plan time for those big projects you *know* are coming, like progress reports or the next field trip?

How do you nicely turn away colleagues who always want to chat during your prep period?

> **Rule 10: Pause to plan.** To maintain a high-functioning organization system you will need to take a little time each week and each month to define what needs to be done in the weeks ahead. This may feel unnecessary at first, but it will ensure that you know what deadlines, personal activities, and meetings you have coming up. Most important, it will allow you to feel in control of your time instead of at the mercy of it.

Reflection Questions:

Do you pause and figure out what you have to do before you start doing it?
What might be a good time to do this during your day or week?

It is important to remember that these rules rather than the concrete tools we are about to review are the keys to your becoming a Together Teacher. In fact, overreliance on a tool may give you a false sense of security. Sometimes teachers will come to me and say, "Maia, I tried everything you told me and bought what you said at Staples, but it just isn't working!" Once the person's problem is diagnosed, I often conclude that it is not the *tool* that is weak. Instead, it is our habits that are out of whack.

THE TOOLS

Although I am fairly neutral about *which* tools you use—whether index cards, paper planners, laptops, tablets, or clipboards—I do care that each of your chosen tools is utilized to its fullest. Each of the following chapters goes into great detail about various tools and skills to stay organized, but it will help you to become familiar with where we are headed on our personal organization journey. At the end of the day, your goal is to have created an hour-by-hour schedule for the upcoming week as the product of a weekly meeting with yourself, called *Weekly Round-Up*.

Where most of us fail is in ensuring that our to-do list is created with intentionality and accounts for the short-term and long-term as well as the proactive and reactive. Therefore, before we create your to-do list for the week, let me introduce you to the four tools that will lead you there and the key habits you will need to create a complete list. You can also see them listed in the center of Figure 1.1.

- The left-hand portion of the figure depicts all the places where to-dos can pop up—your e-mail, paper memos, text messages, meeting notes, phone calls, and more.
- The middle portion displays the main tools on which you will force all of your time, to-dos, thoughts, and notes to land.
  - **The Comprehensive Calendar** lays out all of your time meetings and deadlines in one easy-to-reference location. It is most often a monthly view of your calendar.

- **The Upcoming To-Do List** is a list of your long-term to-dos organized by the month in which you want to begin the task. This list is a combination of deadlines, interim steps, and rainy-day items.

- **Thought Catchers** provide you with a place to track nonurgent ideas related to specific people or areas of responsibility. You can then refer to your Thought Catchers whenever you have sufficient time to actually talk them through with someone else. Most teachers have Thought Catchers for people with whom they regularly interact, such as a co-teacher, a coach, or a department head, or for communications they write, such as a monthly parent update or a motivational letter to students.

- **Meeting/Professional Development (PD) Notes** enable you to organize your professional learnings so that you can reference and implement them more easily in the future.

- The right portion of Figure 1.1 represents the short list of what you intend to accomplish in the coming week—the *Weekly* or *Daily Worksheet.*

   - The Daily or Weekly Worksheet is a very intentional and narrow view of your work for either a particular day or week. But how exactly do you actually get to that detailed to-do list? The answer lies in the Weekly Round-Up, described in great detail in Chapter Seven.

   - The Weekly Round-Up is a weekly routine that involves reviewing the work of the previous week, then planning your time and identifying the to-dos for the week ahead. Kerri K., a middle school special educator, describes the positive impact of being highly organized: "Taking the time to preplan your week and month is definitely worth the peace of mind and clarity of responsibilities that come later!"
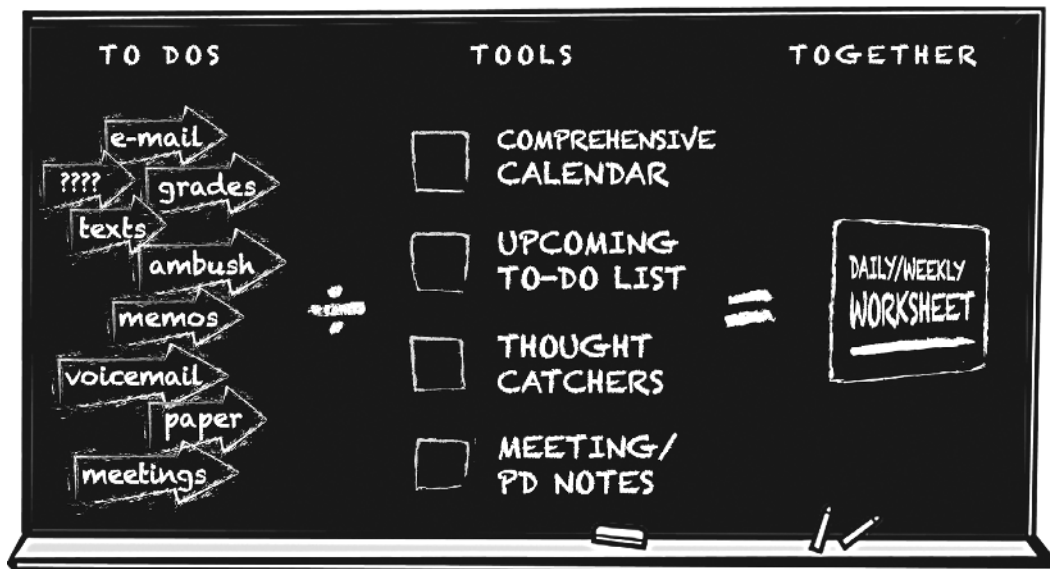

Figure 1.1 Together Teacher Organization Tools

Imagine Your Ideal Week

It is important that you establish how you would *ideally* spend your time in any given week, and you can do this using a combination of the rules and tools introduced in this chapter. The reason I want you to imagine your ideal week is that when I have worked with teachers who are struggling to keep their heads above water, the first questions I ask them are, "What work do you have to do?" "Where is your time going?" and "Where would you ideally like it to go?" Many of them are not able to answer that last question clearly. The following exercise will force you to consider how you would like to spend your time each week.

Let's consider what your ideal week would look like. The idea here is that you want to have a philosophical, big-picture view of your time so you can manage your calendar—before your calendar manages *you*! Doing so helps you to accomplish Rule 9—Own your schedule! This book is *not* a life-coaching-get-Zen guide. Julie Morgenstern, author of *Time Management from the Inside Out* (who started her career organizing *stuff*!) says it well: "The time you have in a day, week, or month is like the space in the top of your closet: only a certain amount of things can fit in it. Before you start dashing from one thing to the next, deliberately decide on how you want to fill the limited space of your day by creating a time map. A time map is a simple chart of your waking hours which displays how much time per day you devote to different areas of your life."

As you consider your ideal week, think about the following questions.

Reflection Questions:
When would you ideally go to sleep and wake up?
When are you teaching and when are your preparation periods?
What things must you do each week at a certain time, for example, student attendance submissions?
What meetings or events occur regularly, for example, staff meetings and coach meetings?
What things must you do each week at a time of your choosing, such as grading or planning?
When do you deal with answering communication, such as parent e-mails or student text messages?
What are some personal priorities that would enhance your week, such as exercise, church, and friends?
When are you ideally *not* working, for example, Saturdays or after 6 PM on weeknights?
What is something you *wish* you were better at planning?
When is your energy the highest? Lowest?
When, if at all, do you find yourself procrastinating?
What are some personal things you wish you had more time for?
What do you find yourself never, ever getting done?

Now that you have considered these questions, let's get more specific. We are going to block out how Kate, a new teacher, would ideally spend her time. As you review Kate's Ideal Week Template (see Figure 1.2), consider the following questions:

- When does she plan?
- When does she grade?
- When does she do personal routine activities, such as cooking, cleaning, and commuting?
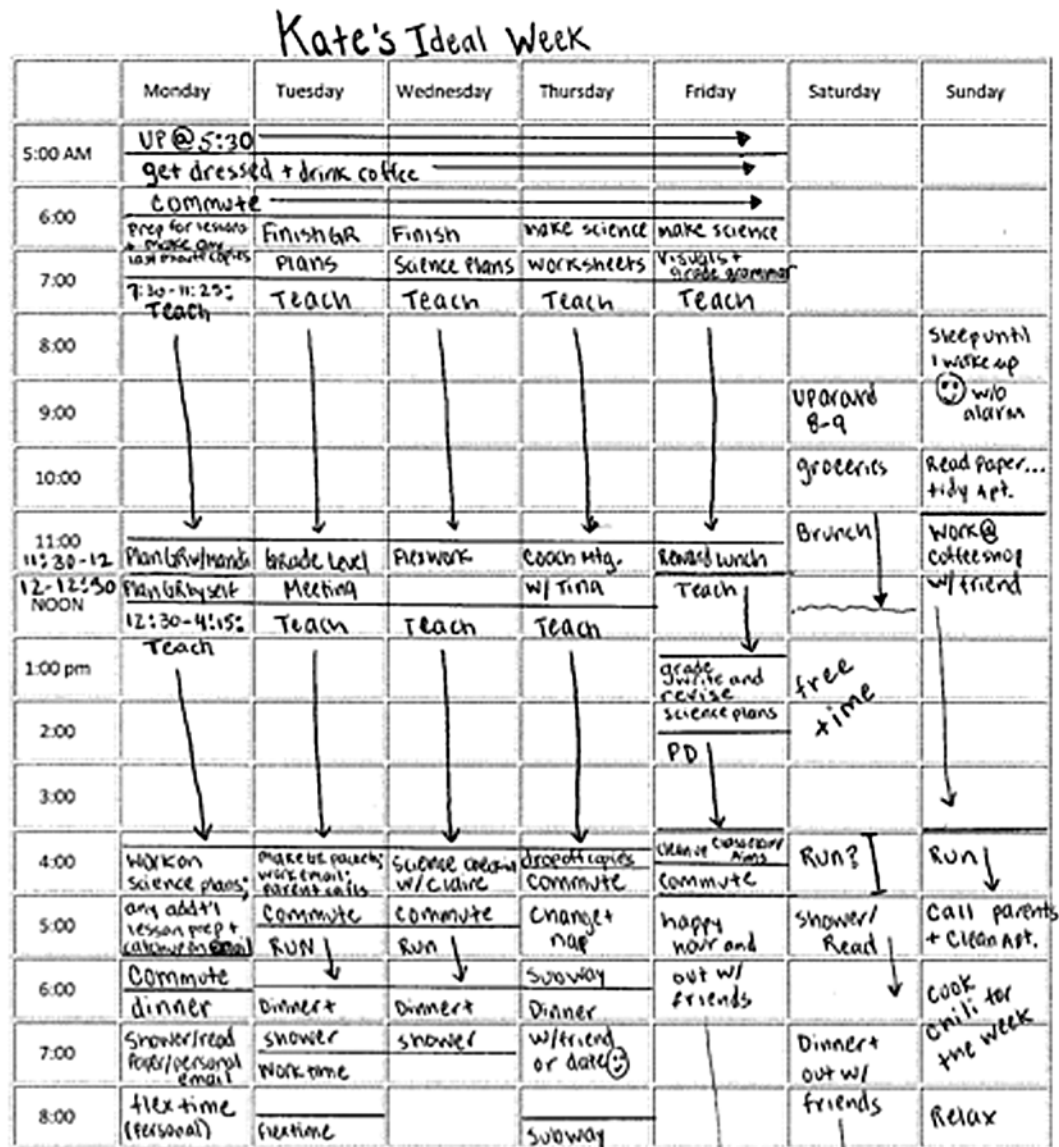- When is she not working?

Figure 1.2 Kate's Ideal Week Template

As you can see, Kate's Ideal Week Template is very, very full. Here is what she did to build it:

- She put in the times her alarm goes off in the morning and her lights go out at night. These boundaries ensure that she is operating with the maximum amount of sleep she needs to teach well. Have you ever tried teaching while tired? I have and it is not a pretty picture.
- She inserted her work—teaching, grade-level meetings, schoolwide professional development, and so on—along with each meeting's time commitments.
- She added buffer times and other necessary items, such as commuting and showering.
- She added when she would do her lesson planning, grading, and classroom materials preparation. This scheduling allows her to not feel like she is *always* grading, planning, and copying—and to maximize her limited prep time.
- She left some time unscheduled for simply not working or for doing whatever she felt like doing.
- She built in time for such things as happy hour on Fridays, cooking chili, running, brunch, and calling her family.

To be clear, this plan is not meant to be followed to the letter each week. It is simply to give you insight into when, ideally, you would accomplish all the work on your plate for a given week. Although you may feel that mapping out your time restricts you, I believe that this high degree of planning actually allows you to be *more* flexible. For example, one night a friend offered Kate tickets to a comedy show on a Wednesday evening. Although Kate had planned to go to bed early that evening and to go out on Thursday evening, she did a switcheroo and planned to go out that Wednesday evening instead of on Thursday. By knowing roughly what she would accomplish (or not accomplish) each evening, Kate could take advantage of opportunities that came her way. The same can be true for you! By becoming extremely aware of how you use your time, you actually gain a great degree of flexibility and relief. You can relax because you know you have time set aside later in the week to unit-plan. You have become more agile and spontaneous because you are aware of the work on your plate and how much time it will take to complete it.

Build Your Ideal Week Template

Now build your own Ideal Week Template using the following checklist. Do not worry about being very specific right now. Concern yourself only with including these essential components on your calendar:

- *Physical needs:* sleep, exercise, eating
- *Scheduled time:* teaching, lunch duty, staff meetings
- *Discretionary work time:* preparation periods, before and after school
- *Big work:* lesson planning, grading papers, writing a weekly parent update (This work usually requires a high-level of focus and brainpower.)
- *Little work:* entering attendance data, answering short e-mails (This work can most likely be done during lower-energy times.)
- *Discretionary personal time:* relaxing at home, reading, visiting a museum, writing letters
- *Emergency buffer:* It's unavoidable—emergencies happen in schools. This would be when you would make urgent phone calls.

Now complete the Ideal Week Template. (See the example in Figure 1.3.)

Inevitably conflicts will arise between what you hope to accomplish and what you absolutely must get done. Conflicts will also arise between how you ideally would like to spend your time—watching *The Office* with your partner and friends—and the work you are required to do to meet the deadlines you have for the week.

All of this is to be expected. What is important in creating your Ideal Week Template is not that everything fit within the seven-day parameter with which you're forced to reckon but that you provide yourself with a clear picture of your ideal schedule before you enter the weekly shuffle. You may not be able to make it to the gym three times this week because of meetings you must attend before and after school, but at least you'll be aware of the various sacrifices and compromises you're making as you chug along.

Rule 7: Mind Your Energy Levels

I am a morning person. To an annoying extreme. To the point where in college I used to call my girlfriends at 6 AM on Sunday mornings and ask if they were ready for brunch. Unsurprisingly, my inquiry was always met with a dial tone. (My husband finds my morning cheeriness annoying enough that when we used to commute together via train, he begged to put on his iPod to block out my jabbering as we crossed the East River.) I am beyond useless, however, after 8 PM. I have been known to sleep through Eric Clapton concerts at Madison Square Garden, to snooze through Al Pacino's Shylock soliloquies in *The Merchant of Venice*, and to take "disco naps" well before the ball drops on New Year's Eve. Thankfully I know when I am on my game and when I'll be too tired to lift a finger. I try not to do much work in the evenings beyond answering short e-mails, preparing invoices, processing receipts, and so on, and I save work that requires focused thinking for those early morning hours.

As you build your Ideal Week Template, be mindful of your energy levels. Corey, a middle school math teacher in her fourth year of teaching, hit a point where she felt overwhelmed

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
5:00 AM							
6:00 AM							
7:00 AM							
8:00 AM							
9:00 AM							
10:00 AM							
11:00 AM							
NOON							
1:00 PM							
2:00 PM							
3:00 PM							
4:00 PM							
5:00 PM							
6:00 PM							
7:00 PM							
8:00 PM							
9:00 PM							
10:00 PM							
11:00 PM							

Figure 1.3 Example of Your Ideal Week Template

at the amount of work she had to deal with on a daily basis. She worked with her principal to track and analyze her time, and soon realized that after daily lunch duty she could not focus sharply on lesson planning. Knowing that her energy level wanes after monitoring a cafeteria full of middle school students, Corey no longer plans lessons after lunch. Instead she uses that time to return parent phone calls and make photocopies. Although these tasks are small, they must still be completed and are now tackled at a strategic time that Corey has reserved for lower-energy, easy-to-accomplish tasks.

Some teachers have found that after creating their Ideal Week Template it is helpful to track their actual use of time against the ideal to see how they match up. Does grading take longer than they anticipated? What emergencies, if any, could they have prepared for? Did the unplanned visits to the teacher's lounge mean they had to make five parent phone calls at night instead of during the day? If you are interested in tracking your time, a template is provided on the accompanying CD.

COMPONENTS OF A GREAT ORGANIZATION SYSTEM

Now that you have a clear view of where you would ideally like your time to go, let's consider *how* you will get there. Remember the Trapper Keeper you had in third grade? The one covered in Lisa Frank and Tonka Truck stickers? There was a *reason* you loved that thing so much. All of your spelling lists, homework assignments, field trip permission slip, pens and pencils, and class work were in *one* neat place. No more racing to your locker to find that scrap of paper for your math teacher.

The problem is that most of us have not built an "adult" version of the Trapper Keeper. Instead we have allowed our organization system to spread out across pieces of paper, electronic notebooks, real notebooks, e-mail in-boxes, and real and electronic Post-it Notes. As you read each chapter of this book I want you to keep the concept of the Trapper Keeper front and center in your mind. Although I'm not asking you to keep an *actual* Trapper Keeper, I am asking you to work toward articulating clearly each component of your organization system. For some of you that system may be a one-inch binder containing all of your materials in hard copy; for others it may be a clipboard and a paper to-do list; and for others it may be simply an iPhone. Throughout the rest of this book I refer to the total system as your *Together Teacher System.*

What Your Together Teacher System Has to Do for You

As you go through the remainder of the book and I ask you to select the tools that work best for you, keep in mind that I don't have a preference for what you select. However, to be an effective system, your set of tools has to do *all* of the following things for you (consider this a way to ensure that you have an airtight system—and yes, there is a quiz at the end!):

- **Be portable.** Many of your to-dos come flying in when you are on an innocent walk to the restroom. Whatever you use to stay organized, be sure it can be on you at all times

as you move through your day. This means if you carry an iPhone you either have to wear clothing with pockets, carry a purse or satchel, or wear an apron with big pockets. This also means that a fat two-inch binder will likely not work.

- **Be readily accessible.** If you get stopped by one of your colleagues in the teacher's lounge who asks you to share a particular resource, I want you to have a place handy to write it down immediately so you can follow up. For many people, paper entry is faster, but for others, entering it into their smartphone works equally well. Whatever it is, it should be swift and simple.

- **Be forward looking.** Because you have only 168 hours in any given week and much of that time is spoken for by teaching and planning, I want your Together Teacher System to allow you to plan how you will use the discretionary time you have. For example, a single notebook wouldn't allow you to plan ahead because it is just lines of empty space with no scheduling format overlaying it.

- **Efficiently group.** I want your Together Teacher System to allow you to do the less important work incredibly quickly (I call this the "not run to the photocopier three times per day" syndrome) and to have time to do the more important work when you have larger chunks of time. An example of a nonefficient system is one in which your big to-dos are mixed with your small to-dos and your long-term ideas are mixed with what you have to get done right this minute.

- **Quickly capture papers and stuff.** Your Together Teacher System needs literal space in which you can grab the incoming work and immediately put it where it needs to go rather than recording everything in an e-mail draft, jumbling it in a notebook, or shoving it into a pocket. For many teachers, this place is a pouch or folder they constantly carry as part of their system.

- **Store stuff.** Most teachers will want to carry some "stuff," such as a pen or pencil, *plus* have a place to store stuff you collect throughout the day, whether a thoughtful thank-you note from a student whom you let re-take a test, a confiscated student cell phone, or a tardy slip handed to you as you are teaching.

As you go along the journey of creating and customizing your personal and classroom organization system, we will check your selection of tools against the components just listed.

LET'S GET STARTED

Let's get started on your journey to becoming a more Together Teacher. Remember, the purpose here is *not* to become an overscheduled robot who can never relax and who focuses only on your to-do list all day. The goal is to have a clear view of all of your work—both big and small items—and a system that allows you to juggle everything as it comes in.

As Gilbert, a pre-K teacher, notes, "When you start to look at your day a little differently, through the 'I have this amount of time, I could get something done' lens, it makes you more productive and more relaxed at the same time. I set deadlines for myself, and I know I will end my workday at 7:30 PM because I know the last two to three hours per day are with my girlfriend. I have literally blocked time for not working, and I force my school work into the allotted time." As you will see in the multiple examples throughout this book, careful planning of your time, organization of your to-dos and stuff, and figuring out what simply can be done faster or at different times of the day can make you noticeably better at your job—and a lot less overwhelmed and stressed.

Let's get started with our first tool—the *Comprehensive Calendar*—which will provide you with a practical way to record your appointments, deadlines, and *Time Blocks.*