

Putting Family First: Strategic Life Planning

How do you really want to be remembered?

By Brian N. Moore, RSBS

Let me start by quoting actor Michael J. Fox: “Family is not an important thing, it’s everything.” As you read this piece, try to keep that in the back of your mind, we will return to it often!

A few years ago I wrote an article about strategic planning for your career. The highlight of the message was that you had to plan your career from the beginning on the basis of what you want your organization to look like when you leave, what people will say about you at your retirement dinner. It is a great exercise in visionary goal setting, and I still encourage new administrators to use it.

Now, I want you to try another set of visionary-planning exercises with a much more important life purpose. Instead of planning your career with its end in mind, let’s plan your life with *its* end in mind. Instead of a retirement dinner, I want you to plan a funeral. Now, before you get upset, I’m not asking you to pick out your favorite dress or suit and choose the music that will be played (although we all know some colleagues who

have done so!), I want you to think about what people will say at your funeral.

Will colleagues stand up and talk about what a great contribution you made to education? Will friends talk about what a great person you were? What about those folks sitting in the very front row? What will they say? And will they be surprised to hear some things from your colleagues that they didn’t know about you—because your colleagues spent more time with you than they did?

Let’s look at two possible scenarios:

- Your son stands up and says that he is proud of you for how much you gave to the community and to the schools.
- Your son stands up and says that he hopes to be as good a parent as you were to him, and you always seemed to be there for him and wanted to be an important part of his life.

Now take a minute and decide which scenario you’d like? I hope it didn’t take long—my answer was the second one.





We spend a lot of time focusing on time management skills, trying to break down large tasks into smaller achievable steps, which is a prudent way to plan and to accomplish our mission as school business officials. I suggest that another important aspect of the planning process is not just time management but priority management and, to complicate it a bit, some selfishness!

So we try to look at tasks with a high priority—tasks that will stop the wheels on the bus from rolling if we don't knock them out. Those are the big “rocks” and we need to take care of them. Next come the tasks that we really should address because it's our job and it's part of our vision for our departments and organizations. Finally, there are tasks that others have asked us to do and, politically, that we really should do to maintain positive relationships with

Planning with the Right Purpose

We are strategic thinkers and planners because of our chosen line of work. Planning is part of our daily routine. Does your daily planner include *every* important aspect of your life, not just your work life? Many of us plan our week with regard to our various roles as business officials, personnel managers, budget coordinators, and advisers to the superintendent. We always begin by planning tasks that will meet the needs of each separate role. But are those the most important roles in our lives?

I always include two more roles, and I start my weekly planning session by scheduling for them: father and husband. Its football season in my home, which means my son Brendan will be playing in football games and my daughter Megan will be cheering at some football games. What goes first on the calendar? Football games for both kids!

Creating separate calendars creates too much of a separation between your work life and your family life.

Some of my friendly readers say they record those activities on the family calendar on the refrigerator at home, but I must politely disagree. Even if it is subliminal, creating separate calendars creates too much of a separation between your work life and your family life. To quote President Reagan, “Tear down this wall!” Include family and social activities in your plan so it reminds you daily that a chief financial officer or school business official is not who you are, but what you do!

colleagues and stakeholders in our organization.

We have three distinct sets of priorities, and we know that failing to accomplish each may have a negative consequence, so we also think about consequence management. If we don't get the budget prepared and submitted on time—well, that's a no-brainer; it must be finished, period. The consequence is losing our job, which is not at all acceptable.

Now, let's consider the meeting that the deputy superintendent set up for you with a food service vendor to look at a new product line that could save money and offer enhanced services to the students. Good opportunity, right? However, at the same time, your fourth-grade son is having a writer's convention and has invited you to be an honored listener.

Looking at the outcome and positive effect, we know that your son's writer's convention will not save money or benefit the bottom line of the organization. But let's also look at the consequences. Will you feel guiltier missing the meeting or missing the convention? Who would you truly rather disappoint, the deputy superintendent or your son? The answer *should* be pretty obvious!

However, life is about framing things and thinking about win-win solutions. How about asking the deputy superintendent and the vendor to reschedule the meeting because you have an event with your child? Certainly no one, including the deputy superintendent, could argue with that without looking like an uncaring person.

Or take it as an opportunity to share the wealth with a supervisee whom you trust. Tell the deputy and the vendor that you think the meeting is a great starting point, and a member of your staff is looking forward to taking the lead on the project and will lay the

groundwork necessary for you and the staff to make a decision about the new service. Everyone wins: you are a hero to your child and your employee is thrilled that you trusted him or her to attend the meeting and take the lead on such an important project.

Some of us are planning junkies, so here are some cool things to add to your planner or Outlook calendar. Try them out and see what a difference they can make in your family life.

1. Let's say your daughter has a particularly hard test that she's been studying for all week. Mark your calendar with the time she gets home from school so you can call her just to check to see how she did! Don't tell her that you will be late or ask to speak to your spouse when you have finished talking to your daughter. Just focus on her, so she knows that you couldn't wait until you got home to find out how she did! Can you see the smile on her face over the phone knowing that you cared enough to take time out of your day to call?
2. How many of us text our spouse or significant other during the day just to check in? What about on really busy days when work is so hectic? Our employees constantly remind us about the importance of break time, so take advantage of the thought! Schedule a time on your calendar just to send a funny—or even romantic—text to let that special someone know that you are thinking about him or her. Try it and see how you feel. I bet you will work a little happier for the next hour or so.
3. Long before we had jobs and careers, we focused on having fun being kids and finding “the one.” But as soon as someone agrees to spend his or her life with us, we suddenly forget what was so important to us all those years ago.

When is the last time you planned and had a date night? Guys, remember the knot in your stomach staring at your phone and trying to get the nerve to call the girl of your dreams and ask her for a date? Remember how great you felt when she said yes?

If you are reading this article in your office right now, stop, pick up the phone, and ask your spouse or significant other to go out Friday night. Choose something that you haven't done in a while, like catching a romantic movie and dinner or drinks at a jazz club. If you just made that call, I bet you feel happier right now? Do you see the connection? If we are happy with our home life, it makes our work life even better!

What's Your Foundation?

Lee Iacocca once said, “The only rock I know that stays steady, the only institution I know that works, is the family.” We always focus on motivation as the reason for some of the things that we do, but does your motivation lie where your foundation should be? We can describe the many different reasons we work, but one of the most important is to provide for our families. No doubt, being a good provider is important, but being a good provider and an absent parent is detrimental to both your family's and your well-being.

What never changes is who we are and who our family is.

We will all change positions and possibly even careers during our working life, but what never changes is who we are and who our family is. They are the source of the stability in our lives. The biggest investment that we can make in our own children's futures is time. And believe me, the return on investment is well worth it!

Take time today to do that one simple exercise: ask yourself how you are viewed as a part of your family and how you want to be viewed. How do you want to be remembered and what lessons do you want the young people in your life to learn from the example that you are setting?

We are great at telling employees what is important to focus on when they are working; now, take a few minutes to ask yourself what is important in life, and are you focusing on it too? Remember, “Family is everything.”

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