

***Editor's note:** Teacher-Guided Professional Development is a democratic approach for those interested in a teacher-centered, partnership-based approach to professional development. TGPD incorporates a number of "process structures," or procedures that groups can use to organize or complete activities. Articles in the March and April issues of Stratenotes (Vol. 8, No. 6 and No. 7) described two process structures—interviews and vignettes—that can help professional developers understand their audiences' needs before a workshop begins. This article describes a process structure—dynamic planning—that can be used to help workshop participants develop implementation plans during the workshop. Other process structures enable learning and problem solving.*

## Dynamic Planning

*A process structure  
from Teacher-Guided  
Professional Development*

*Jim Knight, Research Associate  
KU-Center for Research on Learning*

### Calendar

January 26-27, 2001  
West Regional Update  
Meeting  
Las Vegas, Nevada

February 16-17, 2001  
Northeast Regional  
Update Meeting  
Baltimore, Maryland

March 8-10, 2001  
Southeast Regional  
Update Meeting  
Charleston, South  
Carolina

March 21-23, 2001  
Virgin Islands Update  
Meeting  
Maho Bay, St. John Island

June 21-23, 2001  
California Update Meeting  
Buena Park, California  
All SIM Trainers welcome

July 17, 2001  
Preconference Workshop  
Lawrence, Kansas

July 18-20, 2001  
International SIM Trainers'  
Conference  
Lawrence, Kansas

Dynamic planning is an open-ended, intuitive, easy-to-use process structure that teachers can use to create detailed implementation plans. This activity gives teachers a way to sort out all the details they need to think through to implement initiatives, ranging from simple, such as planning to teach a single strategy, to complicated, such as schoolwide implementation of a strategic writing curriculum. Dynamic planning involves six simple steps: listing tasks, organizing task chronology, estimating time, naming task masters, using a Gantt chart, and identifying measures of success.

### Listing Tasks

The goal of this step is to identify all the tasks that a group of teachers need to complete for an intervention to be implemented once they have decided on a goal they hope to achieve. To start, groups of teachers clear off and gather around a large table. This works best with no more than 15 participants in each group. Group members then discuss



**Check page 5 for important information  
about the next International SIM  
Trainers' Conference.**

## StrateDirectory

StrateDirectory Information Forms are available on the Center's Web site at [www.ku-crl.org/trainers/forms/directory.html](http://www.ku-crl.org/trainers/forms/directory.html). A copy of the form also appeared in the September issue of *Stratenotes*. If you need to make changes to your directory information or if you have never before submitted a form and you want to be included in the directory, mail the completed form to us at KU-CRL, 521 Joseph R. Pearson Hall, 1122 West Campus Road, Lawrence, KS 66045 Attn: Julie Tollefson. The deadline for inclusion in the 2001 directory is **November 10**. StrateDirectory will be distributed to active SIM Trainers in January or February.

Send your news to Julie Tollefson at the Center for Research on Learning, 521 Joseph R. Pearson Hall, 1122 West Campus Road, Lawrence, KS 66045 or e-mail Julie at [jtollefson@ukans.edu](mailto:jtollefson@ukans.edu).

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tasks they believe need to be completed. For example, teachers planning to teach the Sentence Writing Strategy might identify such tasks as photocopying worksheets, reading the manual, creating student folders, scheduling peer-observation and coaching, creating overhead transparencies, and so on.

As each task is identified, a participant writes it on an index card or a self-sticking note, then lays it on the table. Participants continue to brainstorm additional tasks in this way until, eventually, a large number of cards or notes blankets the table, and most tasks are identified.

## Organizing Task Chronology

The goal of this step is to refine the task list and put the list into a chronological order. Teachers sort the cards or notes in order from the task they think should be completed first to the task they think should be completed last. As they organize the tasks, teachers look for gaps (tasks they have forgotten to complete) or redundancies (tasks they have stated more than once). If they notice gaps, the teachers fill them by writing additional tasks on cards or notes. If they notice redundancies, they remove duplicated tasks or rewrite cards to simplify tasks. Tasks to be completed on the same day can be stacked. Eventually, teachers will have organized all tasks in order on the table, creating a detailed, organized action plan for everyone to see.

## Estimating Time

The goal of this step is to determine the date by which every task will be completed. Teachers write the dates when they think tasks should be completed on each card (on the upper-left corner, for example). Eventually, teachers will have estimated and recorded when each task will be completed.

Some computer programs can facilitate the use of the dynamic planning process structure. For example, Microsoft Project can be used to record tasks, set dates, assign responsibility, and create Gantt charts.

## Naming Task Masters

Once completion dates have been identified, the group needs to identify individuals who will be responsible for ensuring that tasks are completed in a timely manner. These people, the task masters, need not do all of the work necessary to complete the tasks, but they are empowered to keep track of the group's progress toward completion of the tasks.

## Using a Gantt Chart

The results of this dynamic planning process can be simply recorded through the use of a Gantt chart (see figure 1 on page 3). On the chart, a group member should list all of the tasks the group has identified, when the tasks will be completed, and who is responsible for ensuring each task is completed. A completed Gantt Chart provides a one-page summary of the group's plan of action.

## Identifying Measures of Success

Once a group of teachers has created a detailed implementation plan, a final step to consider is identifying measures of success. If group members identify exactly how they will know they have achieved their goals, they may be more focused and efficient in their efforts to achieve their goals than if they do not identify their measures of success. ➤

Additionally, measures of success also can serve as the point of departure for follow-up sessions with teams of teachers. When a team has achieved its identified goal, the session can begin with a celebration of success, and the group can dive into another challenge with renewed momentum. When a team has not achieved its identified goal, the group can spend time brainstorming, problem solving, and strategizing to refine implementation plans to ensure that the measures of success are achieved after a second attempt at implementation.


Effective measures of success should have certain characteristics. First, they should be achievable. Group members need to think carefully about whether or not they have created a plan that will enable them to achieve their identified goal. To be sure, ambitious goals are great if they spur a team on to achieve at a level that has never been achieved before, but goals that are beyond the scope of an initiative may serve only to frustrate all participants when they are not achieved.

Second, measures of success need to be tied to a timeline. A timeline says exactly when a goal will be accomplished, and thus everyone in the group knows that their efforts are to focus on achieving the goal by the deadline. When there is no timeline, the chances of a goal being accomplished are diminished simply because the goal then becomes something that can be postponed indefinitely.

Third, measures of success need to be "measurable." When a group sets out to ensure that "all students are motivated," although their goal is

admirable, the group's ability to know that they have achieved their goal is questionable. A measurable goal would be "By October 15, 90% of students will be able to write complete simple sentences."

## Conclusion

Dynamic planning is an easy-to-use, powerful method that enables teachers to plan how they will implement interventions. Obviously, this process structure won't guarantee that teachers will use the learning strategies and content enhancement routines in which they are trained, but by giving teachers a way to organize their plans for implementation, you will make it easier for teachers to make the changes they intend to make. 

*A blank copy of the Gantt chart shown above can be downloaded from the SIM Trainer Resources area of the Center's Web site.*

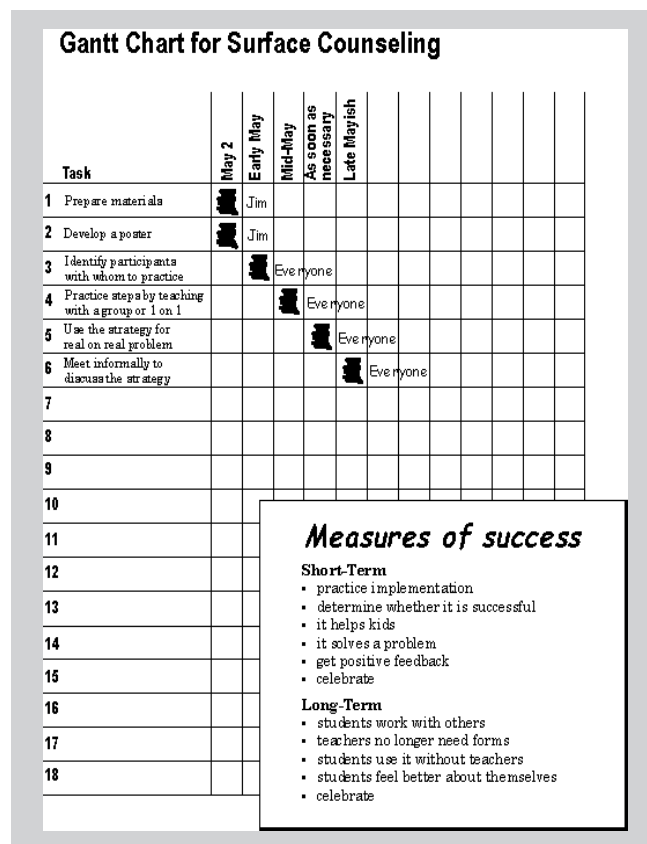


Figure 1

## Workshop canceled

A Learning Strategies workshop for preservice educators, scheduled for January, has been canceled. Individuals who were interested in attending this workshop are invited to attend the SIM Level I or SIM Level II workshop, depending on how much the individual already knows about the Strategic Instruction Model.

## Strateworks memberships

If you know a SIM Trainer who still needs to renew his or her Strateworks membership for 2000-2001, the renewal form is available on the Center's Web site at [www.ku-crl.org/trainers/forms/renew.html](http://www.ku-crl.org/trainers/forms/renew.html). A copy of the form also appeared in the September issue of *Stratenotes*.

## Content Enhancement models sought

Open Door is a three-year, federally funded grant that extends training in Content Enhancement Routines to university professors and graduate teaching assistants. The goal of the project is to provide at-risk, college-level students and those with learning disabilities access to college curricula. The project includes the development of five CD-ROM Content Enhancement modules (*Course Organizer*, *Unit Organizer*, *Concept Mastery*, *Concept Comparison*, and the SMARTER planning routine). These CD-ROMs will be used for professional development training at the higher education level.

We are searching for higher education level models of *Course Organizer*, *Unit Organizer*, *Concept Mastery*, and *Concept Comparison*. We know that students and teachers at the elementary and secondary levels have greatly benefited from the implementation and use of these routines. With your help, we can continue our efforts to make education accessible to individuals with learning disabilities beyond the high school level. Please send hard copies of models and materials to the address below. E-mail any questions, comments, or ideas to Barbara Higgins-Dover at bobilou@ukans.edu.

Barbara Higgins-Dover, GRA  
708 Joseph R. Pearson Hall  
1122 West Campus Road  
Lawrence, KS 66045

# Potential trainers complete summer 2000 workshops

Welcome to the following Learning Strategies and Content Enhancement potential trainers.

## Coco Beach, Florida, Learning Strategies Workshop

June 2000

Judy O' Malley, Debbie Cooke, and Patty Graner, trainers

**Florida:** Janis Slattery, Dunnellon; Jeannette Mosley, Lakeland; Caryl Halburian, Loxahatchee; Cheryl Hunter, Orlando; and Anne Pehrul, St. Petersburg.

## Bellingham, Washington, Content Enhancement Workshop

June 2000

Jerri Neduchal and Connie Gentle, trainers

**Washington:** Michelle Lane, Anacortes; Michelle Mathis, Arlington; Cindy Curan-Bamburg, Bellevue; Tracy Dabbs and David Elliot, Bellingham; Wendy Albright, Barbara Holmkrist, and Barbara Wesen, Bow; Melissa James, Burien; Marilyn Melville, Longview; Linda Ellis, Kay Hoffman, and Susan Stubben, Mount Vernon; Patricia Herzig, Seattle; Carl Bruner, Diana Hagan, Gay Hoerler, and Candace Smith, Sedro-Woolley; and Debra Semrite, Stanwood.

## University of Kansas, Lawrence, Learning Strategies Workshop

July-August 2000

Fran Clark and Vickie Cotsworth, trainers

**Florida:** Kate Kistler, Daytona Beach.

**Illinois:** James Baer, Dundee; and Mary Clements, Carol Curry, and Julie Young, Palatine. **Iowa:** Paula-

Hamp Nelson, Sioux City. **Kansas:** Patsy Wells, Erie; Yvonne Bui, Lawrence; Rebecca Schultz, Stillwell; and Kathy Karlin, Wichita. **Minnesota:** Frances Beversdorf and Norma Sciarra, Minneapolis. **Montana:** Lillian Hartung, Billings. **Ontario:** Nancy Leishman, Sault Ste. Marie. **Utah:** Frances Butler, Ogden. **Wisconsin:** Bonnie Barkelar, Weston.

## University of Kansas, Lawrence, Content Enhancement Workshop

July-August 2000

Jerri Neduchal and Connie Gentle, trainers

**Florida:** Nancy Baker and Lois Gregory, Orlando; and Susan Taylor, Tallahassee. **Kansas:** Bob Hubert, Lawrence. **Missouri:** Sharon Hughes, Wentzville. **Montana:** Mike O'Malley, Laurel. **New York:** Kate Sussman Reimer, New York City.

## Wenatchee, Washington, Learning Strategies Workshop

July-August 2000

Patty Graner and Judy O'Malley, trainers

**Washington:** Sharon Roy, Bellevue; Kitty Rucker, Kingston; Lisa Meehan, Port Orchard; and Cheryl Smith, Seattle.

## Virginia Content Enhancement Workshop

August 2000

Jerri Neduchal, trainer

**Virginia:** Lauri Brattain-Jones, Rachel Buell, Marie Ireland, Charlene Lee, Lisa Rockwell, Donna Schwab, and Sherrell Sherron, Richmond; and Carolyn Ito and Sue Land, Williamsburg.

# International conference to begin on a Wednesday

We're trying something new for the 2001 International SIM Trainers' Conference, so get out your calendars and reserve time now!

The conference will begin on **Wednesday**, July 18, and end on **Friday**, July 20. Traditionally, the conference has run Thursday through Saturday. We hope this change will allow more of you to stay with us throughout the entire conference, while still allowing time for you to spend

another day shopping in Lawrence or Kansas City or to return home for some quality time with your family.

In addition, please note that the conference will be later in the month than usual because of the Fourth of July holiday.

As you are planning for the conference, consider arriving a day early to participate in our preconference workshop on Tuesday, July 17. Jim Knight will facilitate.



The Center for Research on Learning offers a number of e-resources to help you keep in touch and find the support you need for your SIM endeavors.

## SIMTRAINER-L

To engage in discussions for SIM Trainers, subscribe to our e-mail discussion list. Send an e-mail message to

**listproc@ukans.edu**

In the body of the message, type

**sub SIMTRAINER-L Your Name**

Replace "Your Name" with your name. Note that SIMTRAINER-L is all one word; do not type any spaces in the list name. Do not type anything in the Subject line of the message.

## SIMville

SIMville is the first place to look for ideas for training and classroom activities. From the Center's Web site,

**www.ku-crl.org**

click on "SIM Trainer Resources." When you select the log on option, you will be

asked for a password. Type "strategic" in the box (do not type the quotation marks). The password is case-sensitive, so you must use all lowercase letters. Click on the "OK" button. To bypass the password screen in the future, bookmark the first SIMville page.

## Project needs ideas for 3 strategies

Reading Strategies Online is a three-year, federally funded grant that extends training in the use of reading comprehension strategies to teachers nationwide. Three CD-ROMs and web-based modules will offer teachers the advantage of being able to access training on how to teach the *Paraphrasing*, *Self-Questioning*, and *Visual Imagery* strategies. Along with the research data we are gathering, we would like to ask for input from those of you who have used these three strategies. We are searching specifically for enhancement materials, testimonials, and lesson plans that you or others may have created.

Your input will greatly enhance new teacher training and the achievements of children with learning disabilities as well as provide great tools for you to use in training. Please send hard copies of the models and other materials to the address below. If you have any questions, comments, or ideas, please e-mail Barbara Higgins-Dover at bobilou@ukans.edu.

Barbara Higgins-Dover, GRA  
708 Joseph R. Pearson Hall  
1122 West Campus Road  
Lawrence, KS 66045

## Downloads

- **Blank Gantt Chart**  
[www.ku-crl.org/trainers/forms/gantt.html](http://www.ku-crl.org/trainers/forms/gantt.html)
- **Regional meeting registration forms**  
[www.ku-crl.org/trainers/forms/regional.html](http://www.ku-crl.org/trainers/forms/regional.html)
- **St. John letter**  
[www.ku-crl.org/trainers/announce/stjohn.html](http://www.ku-crl.org/trainers/announce/stjohn.html)
- **Strateworks renewal form**  
[www.ku-crl.org/trainers/forms/renew.html](http://www.ku-crl.org/trainers/forms/renew.html)
- **StrateDirectory Information Form**  
[www.ku-crl.org/trainers/forms/directory.html](http://www.ku-crl.org/trainers/forms/directory.html)

## West Region

January 26-27, 2001, at the Las Vegas Tropicana Resort, Las Vegas, Nevada. Barbara Millikan will be the conference coordinator with Susan Miller's assistance.

The **room rate** for Sunday-Thursday is \$49.00 a night plus 9% tax, single or double occupancy. The Friday-Saturday rate is \$119.00 plus 9% tax, single or double occupancy. A block of rooms will be held until 5 p.m. (Pacific) December 27, 2000. After that, reservations will be accepted on a space-available basis. **To reserve a room**, call (800) 634-4000 and identify the name of the meeting as the West Region SIM Trainers Conference and the group code as SIM101 to ensure that you receive the group rate.

### Conference registration:

If you register by December 8, 2000, the cost will be \$100.00. After that, a late fee of \$10 will be added. Make your purchase order or check payable to KU-CRL. If your institution is making the payment and cannot send it by the deadline, send your registration with an explanation of how and when the payment will be made. Send your completed registration form with payment to the University of Kansas Center for Research on Learning, 521 Joseph R. Pearson Hall, 1122 West Campus Road, Lawrence, KS, 66045, Attention: Janet Roth.

We cannot guarantee that people registering after January 5 will have meals at the conference. Also, we may not be able to provide refunds to people who have preregistered but are unable to attend the conference.

## 2001 REGISTRATION FORM

### West Region SIM Trainers' Conference January 26 and 27, 2001

Las Vegas Tropicana, Las Vegas, NV  
3801 Las Vegas Blvd South  
1-800-634-4000 (Room Reservations)

Name: \_\_\_\_\_

Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

Position \_\_\_\_\_ School/Agency \_\_\_\_\_

Home Telephone: (\_\_\_\_) \_\_\_\_\_ e-mail address \_\_\_\_\_

Work Telephone: (\_\_\_\_) \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Make check or P. O. payable in full to:  
University of Kansas Center for Research on Learning

By **December 8, 2000**, send to:  
University of Kansas Center for Research on Learning  
Attn: Janet Roth  
521 Joseph R. Pearson Hall, 1122 West Campus Rd  
Lawrence, KS 66045

For registration postmarked after December 8, 2000, add a \$10 late fee. If your institution is paying your bill and is not able to meet this deadline, please send us the completed registration form by December 8 and indicate that payment will follow. A late fee will not be charged in this case.

### Amount Enclosed:

Registration	\$100.00 (U.S. funds)	_____
Late Fee	\$ 10.00 (U.S. funds)	_____
Total		_____

For anyone who registers after January 5, 2001, meals may not be available unless we have other cancellations. Conference payments to the hotel must be made in advance of the conference. Refunds to persons who have paid and are not able to attend may not be made unless other persons assume the reservation.

**Manuals on which I would like to receive training.** Please write your choices below.

## REGISTRATION FORM

SIM Trainers Update Meeting  
March 21, 22, and 23, 2001  
St. John Island, Virgin Islands

Name: \_\_\_\_\_

Address: \_\_\_\_\_

\_\_\_\_\_

E-mail address: \_\_\_\_\_

Home Telephone: \_\_\_\_\_

Work Telephone: \_\_\_\_\_

Social Security Number: \_\_\_\_\_

Number in my party attending the conference \_\_\_\_\_

Total number in my party \_\_\_\_\_

Persons rooming with me \_\_\_\_\_

Place I plan to stay: \_\_\_\_\_

I would like to have CRL give my name to other participants who are  
needing roommates \_\_\_\_\_ (check if yes)

Make check or P.O. payable in full to:  
University of Kansas Center for Research on Learning

By **December 1, 2000**, send registration and payment of \$90 to:

University of Kansas Center for Research on Learning  
521 Joseph R. Pearson Hall  
1122 West Campus Road  
Lawrence, KS 66045  
Attn: Janet Roth  
e-mail: jroth@ukans.edu  
Phone: (785)864-4780 Fax: 785-864-5728

Amount Enclosed:  
Registration \$90.00 \_\_\_\_\_

If your place of employment is unable to have your payment by this  
date, please send in the registration form with your best estimate of when  
payment can be expected.

Suggest topics that you would like to have addressed at the St. John  
meeting:

### St. John Update

St. John, Virgin Islands  
March 21-23, 2001. Ed Pieper  
is the meeting coordinator.

**If you plan to attend the  
SIM update meeting on St.  
John Island, it is urgent  
that you let us know imme-  
diately.**

The opening session will  
begin Wednesday, March 21,  
at 8 a.m. The closing session  
on Friday will end at noon.

**Registration:** The reg-  
istration fee of \$90 will  
pay for your materials (exclud-  
ing manuals) and some of  
the KU-CRL expenses. No  
meals will be provided. The  
completed registration form  
should be returned to Janet  
Roth at KU-CRL, 521 Joseph  
R. Pearson Hall, 1122 West  
Campus Road, Lawrence,  
KS 66045. Payments should  
be made to KU-CRL.

For more information about  
lodging, airline reservations,  
transportation on the island,  
and the planned program,  
download the complete **St.  
John letter** from the Cen-  
ter's Web site at **www.ku-  
crl.org/trainers/announce/  
stjohn.html**.

### California Update

The California Update  
Meeting will begin at 6 p.m.  
Thursday, June 21, 2001,  
and run through 3 p.m. Sat-  
urday, June 23, 2001. The  
location for the meeting is  
the Radisson Resort Knott's  
Berry Farm in Buena Park,  
California. Cost for rooms is  
\$84 plus 12% tax for single  
or double occupancy.

## Southeast Region update meeting information

The seventh annual Southeast Region SIM Trainers' Update will be March 8-10, 2001, in Charleston, South Carolina. The meeting begins at 12:30 p.m. March 8 at the Embassy Suites Historic Charleston. Center for Research on Learning personnel will offer new manual presentations, and Southeast Region SIM Trainers will present sessions.

Registration will be \$80 for each participant, due on **January 12, 2001**. Make checks payable to

KU-CRL, and mail to Jerri Neduchal at FDLRS Action Resource Center, 1200 W. Colonial Dr., Orlando, FL 32804. A late registration fee of \$90 will be due after January 12.

Hotel suites will be offered for a limited time at a rate of \$159 a night for Wednesday and Thursday nights and \$169 a night for Friday and Saturday nights. Both rates are for single or double occupancy. Parking is \$10 a day. To reserve a suite, call the hotel at (800)

362-2779 (800-EMBASSY) or (843) 723-6900. Please make your reservations by February 7, 2001, to guarantee the reduced rate. Be sure to mention the **University of Kansas Southeast Region SIM Trainers' Update** as your conference.

**If you intend to attend this conference, contact Jerri Neduchal at the address above immediately.** Jerri will send you a detailed letter containing specific information about the meeting.

FIRST CLASS

University of Kansas  
STRATENOTES Volume 9-Issue #2  
CENTER FOR RESEARCH ON LEARNING  
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