

Tactical Planning & Prioritisation Officer Workshops Toolkit

This toolkit is a summary of the content presented at the Officer Workshop delivered in January 2023. This workshop focused on helping officers be pragmatic with the time left in your terms, and aimed to support you in deciding how to prioritise work.

Toolkit Aims

The aims of this toolkit, (based on the original workshop's aims) are to:

- Present different techniques to help in planning for the rest of your term
- Support you in applying your own examples to the different techniques presented

Toolkit Content

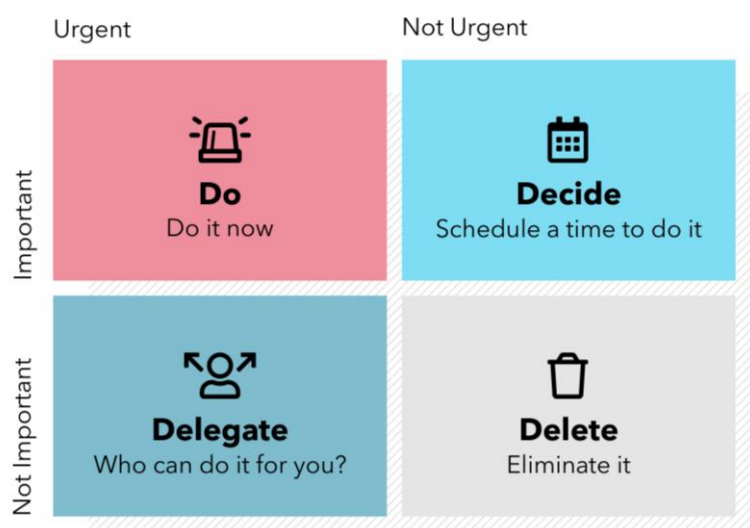
How to decide what to focus on?

- Checking in with your work is a useful approach in understanding your priorities, workload and aims.
- Certain point of the year can offer a natural opportunity to check in with this. Consider when is best for you and fellow officers if relevant.

💡 Some ideas are: post-Winter break in January, post-Easter break in Spring, during the Summer for re-elected officers, in August before the busy academic year starts.

- Be realistic about the amount of time you have left and what work or manifesto aims can be completed in that time.
- Consider your workload, how much of it is dedicated to working on your own manifesto? If this is important to you, but is often trumped by more urgent, or reactive type consider how you can carve out time for this.
- Consider if a legacy is important to you. Some officers like to aim to have one piece of work, campaign or change that lasts beyond their term. If this is a focus, consider how to prioritise this in the remaining time during your term.

Eisenhower Matrix



- The Eisenhower matrix is a great place to start with deciding what is worth prioritising or not, and can be applied to tasks, campaigns and other priorities. It is often used as a tool to prioritise a daily to do list, but can also be used for more mid and long term planning.
- The matrix essentially categorises tasks into four sections, based on both their urgency and importance.
- Tasks in each category are then allocated an action.

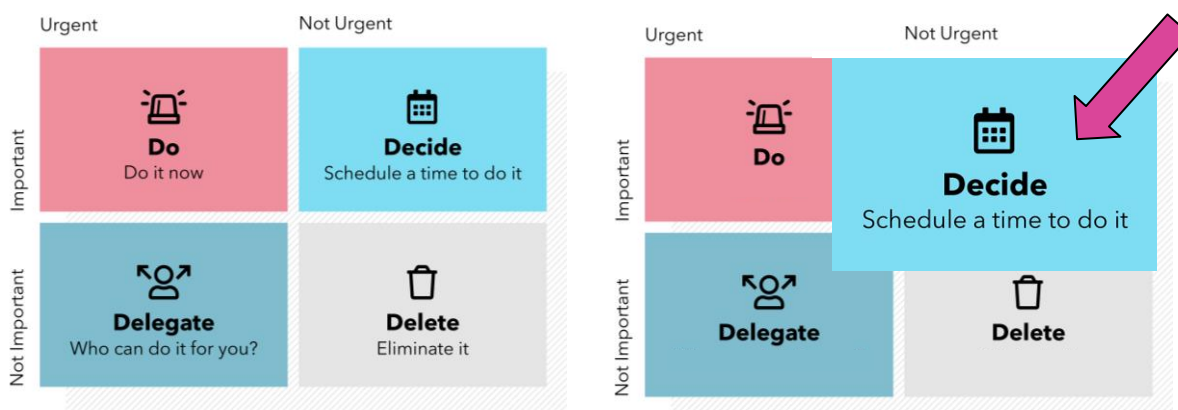
Do: Tasks that are both important and urgent are “Do” tasks and should be prioritised and completed as soon as possible.

Decide: Tasks that are important but not urgent are “Decide” tasks, and should be allocated a specific time to return to.

Delegate: Tasks that are urgent but aren’t important should be delegated to others, who can help you to complete this?

Finally, **Delete:** Tasks that are neither important nor urgent should not be prioritised. Consider why this is a task that needed to be completed in the first place?

- Some considerations to make this framework more useful include:
 - 1) Try and move away from working in the **Do** category all the time, as it can be exhausting to constantly be working on urgent tasks which are also important.
 - 2) Consider what tasks are in the **Delete** category. If a task simply is a waste of time, do not do it! However, if it contributes in another way – for example allows to you connect with students, or contributes to your wellbeing which in turn allows you be more successful or productive, decide how much time you’re willing to spend on this.
 - 3) Break down bigger tasks into sub-tasks. For example, producing a report might be in the **Decide** category. However, writing the first draft may be in the **Do** category, whilst the second draft is in the **Decide** category and creating graphs to add may be in the **Delegate** category.
- Moving away from the **Do** category to the **Decide** category will help in working in a more proactive rather than reactive way.



Activity

- Take the time to complete an Eisenhower matrix for your work. Think about what you'd like to complete during your term, breaking down big manifesto aims into tangible projects or tasks.
- You can use the matrix below, or any other format that best suits you; such as on flipchart paper, with post it notes, on a whiteboard or an online template.
- Some areas you may want to consider are:
 - Manifesto aims
 - Projects with your institution
 - Inherited work
 - Issues raised by students
 - Work from SUs democratic processes
 - What takes up your time in a typical week?

| | Urgent | Not Urgent |
|---------------|-----------------|---------------|
| Important | Do | Decide |
| Not Important | Delegate | Delete |

- An example, including some typical officer tasks

| | Urgent | Not Urgent |
|---------------|---|--|
| Important | Do <ul style="list-style-type: none"> - Prep for today's meeting. - Statement on controversial/current topic. - Stand in for fellow Officer during interviews. - Prioritising first step of Campaign planning. | Decide <ul style="list-style-type: none"> - Review how XYZ project went. - Write first draft report to Board. - Plan how to build relationship with certain stakeholder. - Reread minutes from Committee meeting. |
| Not Important | Delegate <ul style="list-style-type: none"> - Print minutes for meeting. - Menu choices for staff meal - deadline today! | Delete <ul style="list-style-type: none"> - Reading menu for staff meal for half an hour. |

Ok, I have a focus. What next?

- Once you've identified an area of focus, it's a good idea to break down exactly what it is and the steps needed to achieve this work.
- **Tip!** Instead of duplicating work, look for where you've written these down before to save yourself time. Maybe on your manifesto, during campaign planning, for an update to a committee, or presentation to a Board.
- One good technique is to go back to basics with the 5 Ws. This technique is useful in establishing the fundamentals of your aim and ensure its specific.

The 5 Ws (and 1 H)

- Consider these key questions in understanding your upcoming project or tasks.

What?



- What **specifically** do you want to do? What exactly is the change you'd like to see? What would a perfect vs 'good enough' outcome be? How will things look differently if you achieved this?

Why?



- Why do you want to achieve this? What change would this make? Why should students care? Why is it important? Is it worth your time?

When?



- How long will this take, and how are you going to structure your time effectively? Do you need to consider key committee meetings, dates in the student-year?

Who?



- Who needs to get on board? What support do you need from your SU? What expertise should you consult your Trustees about? How will you get your institution's & students' buy in?

Where?



- Does this work relate to a physical space? If so, how does this affect what you want to achieve? Do you have multiple campus, how does this affect your work? Are you close to another SU?







How?



- Once you've answered these key questions, you should be able to make more of a 'Plan of Attack'. Show this to SU colleagues and ask for further support and local ideas.

Activity

- Choose one of your aims (identified in previous Eisenhower matrix task) and complete a 5Ws activity.
- Feel free to use the empty template below, or any technique that works best for you.

| | |
|---|---------------|
|  | What? |
|  | Why? |
|  | When? |
|  | Who? |
|  | Where? |
|  | How? |

Summary

Once you've completed those two activities, you should feel more confident about prioritising your work and how to go about planning your time left in a pragmatic way. Other resources you may find useful are:

The [Officer Skills Audit](#) – this audit allows you to check in with your own skills, where your strengths are and where you like to improve.

[Officer Wellbeing Resources](#) – these toolkits are designed following research into officers' wellbeing and focus on key areas of support.

Feedback – if you have any feedback on the networking or workshop sessions, or on this toolkit please submit it [via this form](#).

Further Support

To receive invites to the officer networking and workshop sessions, or to get in touch for any further support, please email uniondevelopment@nus.org.uk.