

EPISODE 328

How Leaders Can Track and Manage Pre-Actionable Information



INSTRUCTIONAL
LEADERSHIP SHOW



Essential Question



How can I deal with information I'm not ready or able to take action on yet?





Existing Documentation



- Emails, chats, & text messages
- Voicemails—transcribe
- Photos & screenshots
- Teacher observation notes
- Minutes, agendas, plans, & other documents

Forward All To One Place



- Email Inbox » Archive
- Forward to Evernote, OneNote, or similar
- Don't worry about organizing
- Use search to find later

Not Self-Documenting



- Overheard/observed incidents & comments
- Face-to-face conversations
- Gossip/rumor/hearsay
- Concerns, feelings, intuitions

Contemporaneous Notes



- After a face-to-face or phone conversation in which no recording is made and no notes are taken
- Based on memory, but captured immediately
- More credible if shared with other parties at the time, but usually not
- Sending a recap email is often helpful

Hardcopy Journal



- Generally private
- Good for thinking & reflection
- Risk of losing/not having when needed
- Risk of being read by others

Google Doc Journal



- Impossible to lose
- Protected with your login
- Risk of being seen by others on your device
- Risk of being discoverable

Slack/Teams/Discord Messaging



- Organizational or personal account
- Message yourself
- Link to apps like Evernote/OneNote
- Be mindful of limitations/automatic deletion
- Be mindful of discoverability if work account

FOIA/Sunshine Laws



- **Personal memory aids & transitory notes** are generally not considered public records
- **Substantive work records** are subject to retention and disclosure rules
- Where the information is stored is irrelevant to FOIA
- Using a personal device or account may open it to searches required by law or employer, rather than protecting info

General Guidelines



- Keep notes on a personal account, e.g. Evernote or Google
- Assume everything is discoverable
- Be realistic about risk of loss/disclosure
- Avoid single-platform technologies like phone voice memos



Spend Time Thinking



- Journal about your priorities for the day/week
- Reflect on new information you've gathered
- Search your notes for past incidents
- Think about new information that would trigger a next step
- Articulate if-then thinking about ambiguous issues