

# Principles for School Leaders Using Handheld Technology

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Handheld technology provides powerful opportunities for school leaders who integrate them into their personal and professional lives. Learning to integrate new technology also brings new challenges. These principles are simply recommendations for school leaders learning to take advantage of handheld technology while retaining a focus on professional and personal goals. The principles expressed below are based upon research, interviews, and workshops conducted by the authors with school leaders.\* These principles reflect the authors' hope and commitment to help school leaders become the most connected, informed and caring people in their community of learners.

## 1) Document Everything

School leaders must be able to document interactions with people in their organizations for professional, legal, and personal reasons. Handheld technology provides unique options for increasing leaders' ability to record and recall documented interactions. School leaders should understand how to take advantage of these options to improve their documentation of events. The power of handheld technology comes from the ease of recording and recalling documented events. But these options are of little advantage if leaders don't take the time to put them into daily practice.

Because handheld technology is portable and easy to input information, leaders will want to consider developing the habit of carrying the technology with them throughout the day. As they interact with students, staff, and parents, the leader can record facts, comments, and statements that "tickle the hair on the

back of the neck.” The “tickling” pieces come from the leaders knowledge or instinct about what is important, what may be contested, and or items to be discussed in future meetings. School systems and individual leaders will have their own priorities for what should be documented. The important habit for leaders to develop is taking the technology with them and documenting interactions.

Besides being easy to carry around and input information, handheld technology makes it remarkably easy to recall documented interactions. Handheld technology uses a global “find” tool to search throughout all applications for key words or phrases. For example, if a leader wants to recall the date, time, or location of interactions with a parent challenging their decision on a tardy student, leaders simply input the name of the person or a key word like “tardy” into the FIND application. The handheld displays all occurrences of the name or word in the handheld’s memory. Leaders have instant, accurate, and objective recall of interactions, contents of conversations, and their recorded comments. This is useful for historic perspective and potential legal challenges. These documented events can be backed up on their computer when leaders synchronize it with their handheld. Handheld technology’s capacity for recall of critical information only becomes useful if leaders have the commitment and practice of documenting everything (within reason).

## 2) At First Don’t Give Up Existing Documentation

School leaders understand about not putting all their eggs in one basket. As secure and reliable as handheld technology has become, common sense suggests the importance of keeping a variety of methods for documentation in the early stages of learning handheld technology. This means keeping a solid analog and digital trail for legal and financial issues attached to school administration. While taking advantage of being in the halls, classrooms, and meetings with handheld technology, leaders will be all the more assured knowing that other storage and recording systems are in place.

Other principles describe the advantages of being digital and of constant documentation through handheld technology. This principle of continuing existing documentation speaks to staying within a comfort zone while growing handheld technology skills and more practical aspects of bringing people and

systems along. Timeframes for switching to handheld documentation systems will vary from leader to leader. Leaders will want to keep existing documentation as they move their teams and back-up system to handhelds.

As leaders learn to document critical information throughout the day using handheld technology, they'll want to grow from a "comfort zone" when altering professional habits. Keeping existing forms of documentation may mean more work at first, but ensure a natural growth curve as leaders switch to regular use of handheld technology. Many school leaders in our workshops have expressed their great pleasure at how quickly they have been able to learn to use handheld technology. Integrating handheld-based documentation with existing systems allows leaders to change at their own pace with little concern. Once leaders synchronize their digital documents (handheld, computer-based, etc) and analog (paper notes, files, etc) together, they are able to reduce documentation efforts to a single handheld strategy with secure information systems through digital media back-ups.

### 3) It's the Relationships

School leaders are in the relationship business. Every part of their job revolves around a relationship with other people. Handheld technology can get in the way of human-to-human interactions if leaders allow it. It can also be a fabulous aid to relationship building. By having key information about the people they work with at their fingertips, leaders can recall critical information to support and enhance interactions. The handheld technology, upon serving a short and/or long-term memory function, can then be put aside in a pocket to allow a caring dialogue to occur.

Relationships tend to be about people sharing ideas, experiences, and information. School leaders need to be able to communicate with different people at various levels about a plethora of topics. The way in which they conduct themselves and the information they are able to recall are critical to a leader's real and perceived success. Handheld technology allows the leader to enter and recall information specific to projects and people that can be applied to this interaction.

Stories we have gathered from handheld leaders workshops provide good examples. One high school principal shared that he and his assistant principal

record information/reflections about student interactions throughout the day. They exchange through “beaming” this information with each other at the end of the day. The next time they interact with a student, each has the ability to recall information from their handheld. They are able to incorporate this prior information about the student into their conversation. Knowing a student’s schedule, extracurricular interests, accomplishments, or discipline issues allows leaders to be more tuned into the student. Other examples include using handheld technology to recall a teacher’s professional learning goals prior to an evaluation, information about a parent’s children or previous concerns prior to a meeting, and/or special events (birthdays, etc) in a staff member’s life throughout the year.

Because relationships are built on trust, respect, and needs, school leaders can be more responsive through instant access to information about people. Applying that information through dialogue allows leaders to focus on important elements of the interaction. Behaviors such as listening, reflecting, and sharing with others create trust and respect. Handheld technology allows school leaders to be the most connected and informed person in the building. It’s up to the leader to use that information and connection to be the most caring as well. In the end, it’s about the relationships.

#### 4) Being Digital

Handheld technology uses digital elements to function. This means integrated circuits and a bunch of zeros/ones floating around through electrons rather than analog systems (pencil/paper) of pushing graphite atoms around from the end of a wooden stick on paper. Using zeros/ones has some unique advantages over atoms that handheld using leaders can use to work smarter, faster, and broader. It’s about using the advantages of being digital.

Information recorded in a digital format tends to be much easier to move around than in analog. A document, email message, or photo recorded in zeros/ones can be sent electronically to virtually anywhere in the world with the push of a button. This means information created or stored on handhelds can be sent to computers, cell phones email recipients, and/or web sites (or all of the above) instantly. Leaders can be more effective, confident, and communicative leaving digital rather than paper trails.

As described in the Document Everything principle above, the recall of information recorded digitally also provides a powerful tool for school administrators to save time and increase their effectiveness. Most handheld technology contains a “find” function embedded in its key operating system. In most cases school leaders can search ALL information within their handheld by simply typing/writing a key phrase or name. Documents, contacts, and schedules are easier to manage and recall as digital records. These can include policy, school goals, and/or legal information that have been stored on the handheld technology.

Being digital means instant recall and distribution of information at the leader’s fingertips. This is powerful if the leader understands and uses this capacity. Being digital also means that information in zeros/ones takes up very little space on the handheld. Handheld leaders who understand the power of being digital may want to put information such as student data/test scores, school policy, state regulations, staff professional goals, information/interactions with parents; many documents cumbersome in paper form onto their handhelds. These leaders then have the ability to recall, respond, add to, delete, and distribute information anywhere. Being digital is a powerful strategy for leaders who want to be more efficient, connected, and confident as they spend more time building relationships with their constituents.

##### 5) Make it Valuable to You

We tend to value those things that most directly relate to us. School leaders will value and use handheld technology more if it contains information most related to aspects of their professional and personal life. It matters that the information entered into the handheld be important to the user. It seems like such a simple concept, but it’s surprising how many handhelds out there contain files of useless data.

School leaders need to consider, enter, and manage the information most related to their effectiveness as a leader. This can include such items as school budgets, school handbooks, notes about students, special events in the staff’s lives, or personal information about the leader’s daily schedule or personal expenses. There should be a strong motivation to continue to use the handheld to make it relevant to daily events. Creating the positive habit of regularly using

the handheld for important tasks and valuable information will help ensure it's appropriate use.

Putting secure information, such as passwords or credit card information, is possible because of the high level of security protection in handheld software. We recommend leaders use their own judgment about incorporating secure data on their handhelds. Many leaders in our workshops report their experiences have been very positive once they understand and master the security features. It's important to be prudent and create back-ups to your information and passwords.

When leaders use valuable information on their handhelds, they begin fully integrating them into their daily practice. Having access to valuable information allows leaders to stay connected to the administrative task at hand, as well as their own personal and professional growth. Leaders who integrate handhelds into their daily practice report to us they tend to stop thinking about them as technology. It's simply the place they access mission critical information daily. Hence, we recommend school leaders begin and maintain the habit of using information most valuable to the leader on their handheld without neglecting proper back-ups and security.

In addition to the importance of managing data valuable to their leadership, school leaders can also manage personal information using handheld technology. The work of being a school leader can be very demanding. Job demands can sometimes challenge a leader's personal growth, health, and relationships. In addition to professional information, handheld leaders can call upon data related to their fitness, personal obligations, and/or budgets. Handheld technology offers the ability to integrate a variety of data into one tool.

The ability to call upon personal information saves time and worry. It's possible for a school leader to be immersed in some school lunch problem, and then remember through association that they need to get milk on the way home. In a matter of seconds they are able to jot a note to themselves about the milk and continue the problem solving. The same could be true for personal budgets, fitness schedule, a reminder for family events, reading e-books, keeping a personal journal, and/or calling card numbers. Knowing they have (and use)

instant access to personal information helps leaders be the most connected, informed, and caring person in their learning community.

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