


Getting Valid and Useful Educational Results and Payoffs: We Are What We Say, Do, and Deliver

Roger Kaufman, Ryan Watkins, and Ingrid Guerra

 For professional educators, the increasing responsibility for results, consequences, and payoffs of their activities has led us into a new era of professionalism. Around the world this emerging era has brought with it a requirement for a renewed focus on the scientific basis for decision making, a system approach to quality improvement and technology, as well as a consistency in language that leaves no confusion regarding the value that our educational system adds for individuals, organizations, and society.

In this article we offer a common language for defining and achieving success now and in the future. Without a common set of terms to describe our activities, words can mean anything and thereby lose their usefulness. Through a glossary of terms that focuses on the results and payoffs for internal and external clients (instead of the process, activities, and interventions we commonly apply), we suggest that educators can be better prepared to define and achieve required results for the learners and shared community.¹

A Requirement to Deliver Value Added for External Clients and Society

When asked how they would describe education, just about any learner, parent, or neighbor will usually agree that it is an investment in our future. When asked what the expectations of the educational system of their community are, most will expect that they should be able to apply what they learned toward becoming a contributing citizen and good neighbor, as well as for improving the quality of life for themselves, their family, and others in our society. As educators, we talk about such results in glib generalities but do very little in precise, rigorous, disciplined terms to ensure that such results and consequences eventuate. We must get serious about defining, delivering, and validating the accomplishment of useful results.

We are increasingly responsible for results, consequences, and payoffs of our actions (and inactions). We no longer have the luxury of leaving the big questions and issues to leaders, politicians, supervisors, and educational executives.

As educators we must be able to demonstrate the value we added to the lives of learners as well as the life of the shared community. If either the learner or the shared community does not have valid evidence of our success in making a contribution, then in times of tight resources we could be left out of the equation. Or worse, we could be funded and continue to make unnecessary contributions to a community that could benefit greatly from the achievement of useful results.

The new era we have now entered has at its base the defining and achieving of useful results for all stakeholders, including both internal and external partners. We must prove the value we add in terms of empirical data about what we deliver, what it accomplished, and what value it added for all stakeholders, not just the value it added to our team, our department, or our institution, but to the entire system of internal and external partners.² We can no longer get away with “feel good” discussions of how we have increased the efficiency or effectiveness of a process that may or may not add value to all of our clients, our clients’ clients, and the society.

For example, educational as well as other governmental agencies³ are increasingly required to prove the value they add to citizens. Likewise, institutions worldwide are increasingly including societal value added as an integral ingredient of their institutional purpose (Kaufman, Herman, & Watters, 1996; Kaufman, Watkins, Triner, & Stith, 1998; Kaufman, Watkins, & Leigh, 2001). Unfortunately, when we do talk about institutional results we too often stop short of value added for societal and external clients. We glibly refer to client satisfaction or funding level and in so doing we miss the emerging paradigm (Kaufman 1972, 1992, 1998, 2000; Kaufman et al., 2001; Popcorn, 1991) that organizations—all organizations including educational ones—are means to societal ends.

Currently, our focus is often far too narrow. We tend to talk only about “systems”⁴ and not an overall and encompassing “system.” We call all results “outcomes,” and we start our planning as if the only benefactor of our efforts were the institution itself (Kaufman, 1992, 1998, 2000; Kaufman et al., 2001). We overly narrow our focus and limit our value added in both words and deeds.

Our Language—Terms We Use (and Abuse) Often Rob Us of Adding Value

Most of our approaches and methods, including the language we use in describing our profession, commonly leave questions concerning value added unanswered. We tend to talk about means (e.g., online education programs, learning and curriculum frameworks, student-centered learning, academic/learner support infrastructure, high-stakes testing, credentials of teachers, CD-ROMs, and so forth) and not ends (e.g., learner success in school and in life, productive and contributing citizens, reduction in poverty, client value added, and so forth). Our

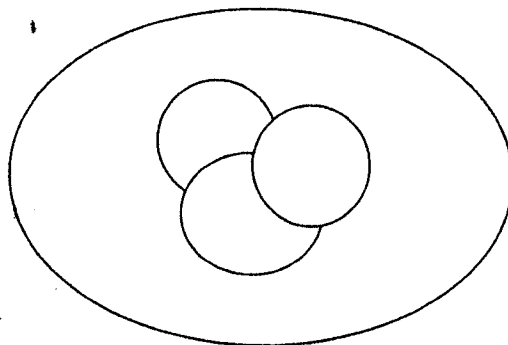
language seems almost to encourage a number of confusions that “allows” for lack of precision and consequences and a focus on means and resources instead of results and learner success in and after schooling.

The professional educator of the future has to know how to both improve the performance of the learner and institution, as well as justify why an individual or institution should improve. For in addition to justifying what we use, do, accomplish, and deliver, the new reality is that we must validate that there are useful consequences in terms of results for both the clients and society. From a societal perspective, value added includes the survival, health, and well-being of all partners. Planning for and achieving results at the societal level (i.e., value added for tomorrow’s child) is termed mega planning or strategic thinking (Kaufman, 1992, 1998, 2000; Kaufman et al., 2001). It is this system or overarching system (society) that best begins our planning and serves as the basis for our evaluation and continuous improvement. But to be successful in planning for and demonstrating value added from educational initiatives, we must use words with rigor and precision. Language that is crisp, to the point, and focused on results (including societal payoffs) is essential for professional success. And then we must match our promises with deeds and payoffs that measurably add value.

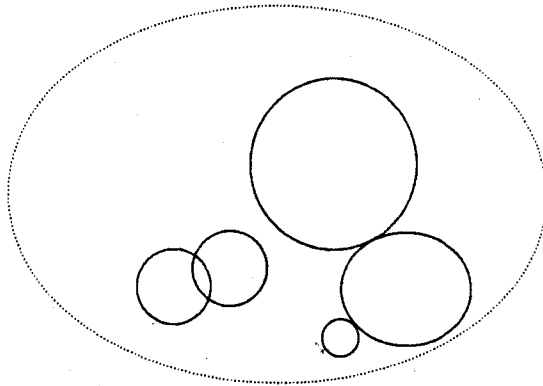
**System, Systems, Systematic, and Systemic:
Related but Not the Same**

To set the framework, let’s define these basic terms, relate them, and then use them to put other vocabulary in context.

System approach: Begins with the sum total of parts (i.e., the system or society), and then determines how its subsystems can work independently and together to achieve a useful set of results at the societal level (i.e., add value for all internal and external partners). We best think of it as the whole and we can show it thus:



Systems approach: Begins with, or focuses on, the parts of a system (i.e., subsystems), while linkages to the system are either not identified or assumed. We can show it thus:



It should be noted here that the “system” is made up of smaller elements, or subsystems, shown as “bubbles” imbedded in the larger system. If we start at this smaller level, we will start with a part and not the whole. So, when someone says they are using a “systems approach,” they are really focusing on one or more subsystems. They are, unfortunately, focusing on isolated parts and not the whole. When planning and doing at this level, they can only assume that the payoffs and consequences will add up to something useful to society and external clients, and this is usually a very big assumption.

Systematic approach: An approach that does things in an orderly, predictable, and controlled manner. It is a reproducible process. Doing things, however, in a systematic manner does not ensure the achievement of useful results.

Systemic approach: An approach that purposely and proactively affects everything in the system. Conventionally, however, the definition of “the system” is usually left up to the practitioner and may or may not (usually not) include external clients and society. Thus, the fact that something is referred to as systemic does not necessarily mean that it is useful.

Interestingly, these two terms, system and systems, are often used interchangeably. Yet they are not the same. Notice that when the words are used interchangeably and/or when one starts at the systems level and not the system level it will mean that we might not add value to external clients and society.

Semantic quibbling? We suggest just the opposite. If we talk about a “systems” approach and do not realize that we are focusing on splinters and not

on the whole, we usually degrade what we use, do, produce, and deliver in terms of adding value inside and outside of the educational organization. When we take a "systems" approach we risk losing a primary focus on societal survival, self-sufficiency, and quality of life. We risk staying shortsighted and delivering results that are less than useful for the future success of learners and educational operations.

A primary focus on survival, health, and well-being is critical and pragmatic for all institutions. Kaufman (2000)⁵ urges that we must focus on societal payoffs—on a "system" approach for both survival and ethical reasons. He asks: What organizations that you personally do business with do you expect to really put client health, safety, and well-being at the top of the list of what they must deliver?

It is the rare individual who does not care whether the organizations that affect his or her life have a primary focus and accountability for survival, health, welfare, and societal payoffs. Most people, regardless of culture, want safety, health, and well-being to be the top priorities of everyone they deal with. From the airline industry to tire manufactures, from baby food producers to elementary schools, all institutions have both a direct impact on and a responsibility for the results that impact on their clients, clients' clients, and society.

Likewise, the results we deliver must be of the same utility as those that we demand of others. So, if we want mega planning (i.e., value added for society) to be at the top of the list for others (e.g., airlines,⁶ government, software manufactures), why aren't we willing to make it the primary guide for making decisions in our own work?

For many of us, at best we give lip service to striving for customer/learner/parent/community satisfaction, higher levels of funding, or approval, and then go on to work on splinters of the whole. We work on educational courses and curriculum for subjects, and then we hope that the sum total of all of the "educated" people adds up to organizational success as well as to their success and contribution in life. Too often we do not formally include external client (learner) survival and well-being in our educational plans, programs, and delivery. We rarely start our educational and program planning with an "outside-the-institution" perspective. When we do begin out of the institution, the pragmatic starting place is with an *outcome*⁷ statement that clearly and rigorously defines the contributions to society, before selecting the institutional specific results and resources (outputs, products, processes, and inputs).

The words we use in everyday communications can often get in the way of a societal value-added focus for educators and education. To keep our performance and value-added focus, we should adjust our perspective when reviewing the literature and as we listen to speakers at meetings. Far too often we read and hear key terms used with altering (or case specific) definitions. There seems to be many words that sound familiar, and because these words

are often so comfortable and identify us as professionals, we neglect to question the meaning or appropriateness of their use within a specific context. When we apply the words and concepts inconsistently, we find that their varying definitions can abridge success.

What we communicate through the words and phrases is important since they operationally define our profession. Additionally, they communicate our objectives and processes to others. They are symbols and signs with meaning. When our words lead us away, by implication or convention, from designing and delivering useful results for both internal and external educational clients, then we must consider changing our perspectives and our definitions.

If we don't agree on definitions and communicate with common and useful understandings, then we will likely get a "leveling" of the concepts (as well as our resulting efforts and contributions) to the lowest common denominator, a regression to the meaning of sorts.

Let's look as some frequently used words, define each, and see how a shift in focus to a more rigorous basis for our terms and definitions will help us add value to internal and external clients. The following definitions⁸ come from our review of the literature and other writings. Many of the references and related readings from a wide variety of sources are included at the end of the article. Italics provide some rationale for a possible perspective shift from conventional and comfortable to societal value added.⁹ In addition, each definition identifies if the word or phrase relates most to a system approach, systems approach, systematic approach, or systemic approach (or a combination). The level of approach (system, systems, and so forth) provides the unit of analysis for the words and terms as they are defined in this article. Alternative definitions should also be analyzed based on the unit of analysis. If we are going to apply system thinking (decision making that focuses on value added at the individual, organizational, and societal levels), then definitions from that perspective should be applied in our literature, presentations, workshops, and products.

ADDIE model (systems approach, systematic approach, systemic approach): A contraction of the conventional instructional systems steps of Analysis, Design, Development, Implementation, and Evaluation. *It ignores or assumes a front determination through assessment of what to analyze, and it also assumes that the evaluation data will be used for continuous improvement. Starting educational change or improvement with "analysis" assumes that existing objectives are useful and valid.*

A²DDIE model (Guerra, 2001a, 2001b) (system approach, systems approach, systematic approach, systemic approach): Based on the original ADDIE model, it requires that assessment, beginning at the system level, be added as the first step. *Assessing-identifying or verifying needs before analysis reduces, or eliminates, the potential risks of assuming that what is being analyzed is the root cause of performance deficiencies. This distinction*

allows professionals the opportunity to identify root problems and causes and thus, appropriate solutions, with a lower probability of being biased by familiar methods.

Change creation (Kaufman & Lick, 2000–2001) (system approach, systemic approach, systematic approach): The definition and justification, proactively, of new and justified as well as justifiable destinations. If this is done before change management, acceptance is more likely. *This is a proactive orientation for change and differs from the more usual “change management” in that it identifies in advance where individuals and organizations are headed rather than waiting for change to occur and be “managed.”*

Change management (systems approach, systemic approach, systematic approach): Ensuring that whatever change is selected will be accepted and implemented successfully by people in the educational institution. *Change management is reactive in that it waits until change requirements are either defined or imposed, and then moves to have the change accepted and used.*

Comfort zones (system approach, systematic approach, systemic approach): The psychological areas, in business or in life, where one feels secure and safe (regardless of the reality of that feeling). *Change is usually painful for most people. When faced with change, many people will find reasons (usually not rational) not to make modifications. This gives rise to Tom Peter's (1997) observation that “it is easier to kill an organization than it is to change it.”*

Competencies (systems approach): A job task or activity that when correctly carried out results in effective performance in a job (Guerra, 2001a, 2001b). *In order for competencies to add value, they should be linked to societal and organizational objectives. Another way to define competencies can be based on products that would indicate successful completion of required tasks.*

Costs-consequences analysis (system approach, systems approach): The process of estimating a return-on-investment in order to prioritize gaps in results (needs) before potential solutions are selected or implemented. It asks two basic questions simultaneously: what is the cost to close a gap in results versus what is the cost to ignore the need. *Most formulations of return on investment conform to an evaluation approach that only provides data after solutions have been finalized and implemented. This analysis of cost and consequences permits coarse-grain data at the mega, macro, and micro levels to be used by decision makers in determining priority needs and feasible solutions (Kaufman, 1998, 2000; Kaufman & Keller, 1994; Kaufman, Keller, & Watkins, 1995; Kaufman et al., 2001).*

Criteria (system approach, systems approach, systematic approach, systemic approach): Precise and rigorous specifications that allow one to demonstrate proof of what has been or has to be accomplished. Many processes in place today do not use rigorous indicators for expected

performance. If criteria are "loose" or unclear, there is no realistic basis for evaluation and continuous improvement. Loose criteria often meet the comfort test but do not illustrate a humanistic approach that cares enough about others to define, with stakeholders, where they are headed and how to tell when they have or have not arrived.

Deep change (system approach, systemic approach): Change that extends from mega (i.e., societal value added) downward into the institution to define and shape macro, micro, processes, and inputs. It is termed "deep change" to note that it is not superficial or just cosmetic, or even a splintered quick fix. *Most planning models do not include mega results in the change process, and thus miss the opportunity to find out what impact their contributions and results have on external clients and society. The other approaches might be termed "superficial change" or "limited change" in that they only focus on an organization or a small part of an organization.*

Desired results (system approach, systematic approach): Ends (or results) identified through needs assessments that are derived from soft data relating to "perceived needs." *"Desired" indicates these are perceptual and personal in nature.*

Ends (system approach, systematic approach): Results, achievements, consequences, payoffs, and/or impacts. The more precisely results are specified, the more likely that reasonable methods and means can be considered, implemented, and evaluated. *Without rigor for results statements, confusion can take the place of successful performance.*

Evaluation (systems approach, systematic approach): A process that assesses the efficiency and effectiveness of a program or intervention based on a comparison of "what did we give" and "what did we get," or put another way, current status (what is) versus intended status (what was intended). *Unfortunately, "evaluation" is used for blaming and not fixing or improving. When blame follows evaluation, people tend to avoid the means and criteria for evaluation or leave them so loose that any result can be explained away.*

External needs assessment (system approach): Determining and prioritizing gaps, then selecting problems to be resolved at the mega level. This level of needs assessment is most often missing from conventional approaches. *Without the data from it, one cannot be assured that there will be strategic alignment from internal results to external value added.*

Hard data (system approach, systems approach, systematic approach): Performance data that are based on objectives and are independently verifiable. *This type of data is critical. It should be used along with "soft" or perception data.*

Ideal vision (system approach, systematic approach, systemic approach): The measurable definition of the kind of world we, together with others, commit to help deliver for tomorrow's child. *An ideal vision defines the mega*

level of planning. It allows an organization and all of its partners to define where they are headed and how to tell when they are getting there or getting closer. It provides the rationality and reasons for an organizational mission objective.

Inputs (systems approach, systematic approach): The ingredients, raw materials, physical and human resources that an organization can use in its processes in order to deliver useful ends. *These ingredients and resources are often the only considerations made during planning without determining the value they add internally and externally to the organization.*

Internal needs assessment (systems approach): Determining and prioritizing gaps, then selecting problems to be resolved at the macro (organizational) and micro (small group/individual) levels. *Most needs assessment processes are of this variety (Watkins, Leigh, Platt, & Kaufman, 1998.)*

Learning organization (systems approach, systematic approach): An organization that sets measurable performance standards and constantly compares its results and their consequences with what is required. Learning organizations use performance data, related to an ideal vision and the primary mission objective, to decide what to change and what to continue. It learns from its performance and contributions. Learning organizations may obtain the highest level of success by strategic thinking: focusing everything that is used, done, produced, and delivered on mega results—societal value added. *Many conventional definitions do not link the “learning” to societal value added. If there is no external societal linking, than it could well guide one away from the new requirements.*

Macro level of planning (systems approach): Planning focused on the organization itself as the primary client and beneficiary of what is planned and delivered. *This is the conventional starting and stopping place for existing planning approaches.*

Means (systems approach, systematic approach): Processes, activities, resources, methods, or techniques used to deliver a result. *Means are only useful to the extent that they deliver useful results at all three levels of planned results: mega, macro, and micro.*

Mega level of planning (system approach): Planning focused on external clients, including customers/citizens and the community and society that the organization serves. Also termed “strategic planning plus.” *This is the usual missing planning level in most formulations. It is the only one that will focus on societal value added: survival, self-sufficiency, and quality of life of all partners. It is suggested that this type of planning is imperative for getting and proving useful results.*

Mega thinking (system approach): Thinking about every situation, problem, or opportunity in terms of what is used, done, produced, and delivered as having to add value to external clients and society. Same as strategic thinking.

Methods-means analysis (systems approach, systematic approach):

Identifies possible tactics and tools for meeting the needs identified in a "system analysis." The methods-means analysis identifies the possible ways and means to meet the needs and achieve the detailed objectives that are identified in this mega plan, but does not select them. *Interestingly, this is a comfortable place where some operational planning starts. Thus, it either assumes or ignores the requirement to measurably add value within and outside the organization.*

Micro level of planning (systems approach): Planning focused on individuals or small groups (such as desired and required competencies of associates or supplier competencies). Planning for building-block results. *This also is a comfortable place where some operational planning starts. Starting here usually assumes or ignores the requirement to measurably add value to the entire organization, and beyond—to society.*

Mission analysis (systems approach): Analysis step that identifies: (1) what results and consequences are to be achieved, (2) what criteria (in interval and/or ratio scale terms) will be used to determine success, and (3) what are the building-block results and the order of their completion (functions) required to move from the current results to the desired state of affairs. *Most mission objectives have not been formally linked to mega results and consequences, and thus strategic alignment with "where the clients are" are usually missing (Kaufman, Watkins, Triner, & Stith, 1998).*

Mission objective (systems approach): An exact, performance-based statement of an organization's overall intended results that it can and should deliver to external clients and society. *A mission objective is measurable on an interval or ratio scale and states not only "where are we headed" but also adds "how we will know when we have arrived." A mission objective is best linked to mega levels of planning and the ideal vision to ensure societal value added.*

Mission statement (systems approach): An organization's macro-level "general purpose." *A mission statement is only measurable on a nominal or ordinal scale of measurement and only states "where are we headed" and omits rigorous criteria for determining how one measures successful accomplishment. At best, conventional missions¹⁰ stop here.*

Need (system approach, systems approach, systematic approach, systemic approach): The gap between current results and desired or required results. *This is where a lot of planning "goes off the rails." By defining any gap as a "need" one fails to distinguish between gaps in means and gaps in ends, thus confusing how and what. If "need" is defined as a gap in results then there is a triple bonus: (1) it states the objectives (what should be), (2) it provides the evaluation and continuous improvement criteria, and (3) it provides a clear and documented basis for justifying any proposal. It does so by defining and documenting the results—distance between where we should be and where we actually are,*

thereby allowing one to estimate the cost to meet the need as well as the cost to ignore it—proof that the costs outlined in the proposal are accurate and justified.

Needs analysis or causal analysis (systems approach): Taking the determined gaps (i.e., needs), and finding the root causes of the inability for delivering required results. A needs analysis also identifies possible ways and means to close the gaps in results—needs—but does not select them. *Unfortunately, “needs analysis” is usually used interchangeably with “needs assessment.” They are not the same. How does one “analyze” something (such as a need) before one knows what the need actually is? First assess the needs, then analyze them.*

Needs assessment (system approach, systems approach): A formal process that identifies and documents gaps between current and desired and/or required results, arranges them in order of priority on basis of the cost to meet the need as compared to the cost of ignoring it, and selects problems to be resolved. *By starting with a needs assessment, justifiable performance data and the gaps between what is and what should be will provide the realistic and rational reason for both what to change as well as what to continue. When the needs assessment starts at the mega level then the “+” is appropriate.*

Objectives (system approach, systems approach): Precise statement of purpose, or destination of where are we headed and how will we be able to tell when we have arrived; the four parts to an objective are: (1) what result is to be demonstrated, (2) who or what will demonstrate the result, (3) under what circumstances will the result be observed, and (4) what interval or ratio scale criteria will be used. *Loose or process-oriented objectives will confuse everyone (cf. Mager, 1997). A mega-level result is best stated as an objective.*

Outcomes (system approach): Results and payoffs at the external client and societal levels. *Outcomes are results that add value to society, community, and external clients of the organization. These are results at the mega level of planning.*

Outputs (systems approach): The results and payoffs that an organization can or does deliver outside of itself to external clients and society. *These are results at the macro level of planning where the primary client and beneficiary is the organization itself. It does not formally link to outcomes and societal well-being unless it is derived from outcomes, results at the mega or societal level (i.e., the ideal vision).*

Paradigm (system approach, systems approach, systematic approach, systemic approach): The framework and ground rules individuals use to filter reality and understand the world around them (Barker, 1992). *It is vital that people have common paradigms that guide them. That is one of the functions of the ideal vision, that everyone is headed toward a common destination and may uniquely contribute to that journey.*

Performance (system approach): The results an individual or organization accomplishes in their progression toward measurable objectives or required results at the societal (mega), organizational (macro), and individual/team (micro) levels. *Performance is the measurable result of performing.*

- Performance accomplishment system (PAS) (system approach, systems approach, systemic approach):** A system that integrates results (i.e., performance) focused approaches of needs assessment, strategic planning, causal analysis, performance requirements analysis, and solution selection. *All planning and assessment begins at the mega level* (Kaufman, 2000).
- Performing (systems approach):** An alternative way of referring to individual and team behavior or effort. The focus is on the behaviors and/or processes of themselves and others, based on the assumption that increased efficiency, and perhaps effectiveness, of performing (e.g., productivity) will lead to valued performance. Such an approach remains focused on bettering existing performing and not necessarily the required performance. *Performing, then, is all the activities, interventions, and tactics we do to accomplish performance.*
- Processes (systems approach, systematic approach):** The means, processes, activities, procedures, interventions, programs, and initiatives an organization can or does use in order to deliver useful ends. *While most planners start here, it is dangerous not to derive the processes and inputs from what an organization must deliver and the payoffs for external clients.*
- Products (systems approach):** The building-block results and payoffs of individuals and small groups that form the basis of what an organization produces and delivers inside as well as outside of itself and the payoffs for external clients and society. *Products are results at the micro (small group/individual) level of planning.*
- Quasi-need (systems approach, systematic approach):** A gap in a method, resource, or process. *Many so-called needs assessments are really quasi-needs assessments since they tend to pay immediate attention to means (such as training) before defining and justifying the ends and consequences* (Watkins, Leigh, Platt, & Kaufman, 1998).
- Required results (system approach, systems approach, systematic approach, systemic approach):** Ends identified through needs assessment that are derived from hard data relating to objective performance measures. Results: ends, products, outputs, outcomes, accomplishments, and consequences. *Usually misses the outputs and outcomes.*
- SKAAs (systems approach):** Skills, knowledges, attitudes, and abilities. *The basic elements of individual performance and performance change.*
- Soft data (system approach, systems approach):** Personal perceptions of results. Soft data are not independently verifiable. *While people's perceptions are reality for them, they are not to be relied on without relating to hard—independently verifiable—data as well.*
- Strategic alignment (system approach):** The linking of mega/outcomes, macro/outputs, and micro/product-level planning and results with one another and with required processes and inputs. *By formally deriving what the*

organization uses, does, produces, and delivers to mega/external payoffs, strategic alignment is accurate and complete.

Strategic thinking (system approach): Approaching any problem, program, project, activity, or effort, noting that everything that is used, done, produced, and delivered must add value for external clients and society. *Strategic thinking starts with mega and is equivalent to mega thinking.*

System analysis (system approach): Identifies and justifies *what* should be accomplished based on an ideal/mega vision and is results-focused. It is a series of analytic steps that include mission analysis, function analysis, and (if selected) task analysis. It also identifies possible methods and means (methods-means analysis), but does not select the methods-means. *This starts with rolling-down (from outside to inside the organization) linkages to mega.*

Systems analysis (systems approach): Identifies the most effective and efficient ways and means to achieve required results. Solutions and tactics-focused. *This is an internal—inside the organization—process.*

Tactical planning (systems approach): Finding out what is available to get from what is to what should be at the organizational/macro level. *Tactics are best identified after the overall mission has been selected based on its linkages and contributions to external client and societal (ideal vision) results and consequences.*

Wants (systems approach): Preferred methods and means that are assumed to be capable of meeting needs.

What is (system approach, systems approach, systematic approach): Current operational results and consequences; these could be for an individual, an organization, and/or for society.

What should be (system approach, systems approach, systematic approach): Desired or required operational results and consequences; these could be for an individual, an organization, and/or society.

Wishes (systems approach): Desires usually concerning means and not ends. It is important not to confuse “wishes” with needs.

Making Sense of Definitions and Their Contribution to a Mega Perspective

What can we surmise by a close consideration of the above definitions and the consideration of the possible perspective (unit of analysis) differences between conventional use and what is suggested here?

1. System approach \neq systems approach \neq systematic approach \neq systemic approach.
2. Mega-level planning \neq macro-level planning \neq micro-level planning.
3. System analysis \neq systems analysis.
4. Means \neq ends.

5. Outcome \neq output \neq product \neq process \neq input.
6. There are three levels of planning: mega, macro, and micro and three related types of results: outcomes, outputs, products.
7. Need is a gap in results, not a gap in process or input.
8. Needs \neq wants \neq wishes.
9. Goals \neq objectives (objectives are goals that include measurable criteria).
10. Competence \neq performance.
11. Needs assessment \neq needs analysis (nor front-end analysis, or problem analysis).
12. Strategic planning \neq tactical planning \neq operational planning.
13. Strategic planning and strategic planning plus are terms also used to refer to mega planning.
14. Change creation \neq change management.
15. Hope \neq reality.

Nitpicking? No. In order to ensure that we help bring about positive change, we have to design, develop, and deliver that change, and we have to prove our contributions. Thus, the words and concepts we use are much too important to leave loose and open to confusion.

If we are to take education seriously, we must ensure that all we use, do, produce, and deliver adds value to society. We must agree on both a common destination and be able to correctly define and use concepts and tools to ensure that our contributions are useful. Our learners, parents, educators, and communities deserve no less. LJER

Notes

1. This article is based on an earlier writing by Kaufman and Watkins (2000) that appeared in *Performance Improvement*, the journal of the International Society for Performance Improvement. Based on feedback, the work has been reconceptualized for an international education audience.
2. See Kaufman, Watkins, & Leigh (2001) for additional information on internal and external partners and stakeholders.
3. The so-called U.S. Government Performance and Results Act (GPRA) does exactly this and demands links to a strategic plan. Evolving in this initiative is the linking of strategic planning to societal return on investment (Watkins, Leigh, Foshay, & Kaufman, 1998).
4. A mention of systems in common literature usually refers to subsystems, rather than an accurate focus or reference to the system (society).
5. Also see Watkins, Kaufman, & Leigh (2000) and Kaufman, Watkins, & Leigh (2001).
6. September 11, 2001, with the terrorists savage attack on democracies worldwide, shows the huge penalties of not linking everything that is used, done, and delivered to external safety and survival. Just focusing on one or more systems is painfully evident.

7. As we will note later, this word is used in a fuzzy way by most people for any kind of result.
8. This section, at first, might sound a bit tedious. We feel it important to carefully consider each term, definition, and implications in order to make a rational decision on whether to participate in a perspective adjustment.
9. These are in alphabetical order. At first, some of the definitions won't "follow" but please scan the list for words not yet defined.
10. Conventional "missions" usually focus on means (what is done and used) rather than results (what is to be accomplished) and usually do not relate to value added for external clients and society.

References

- Barker, J. A. (1992). *Future edge: Discovering the new paradigms of success*. New York: William Morrow.
- Guerra, I. (2001a, January). Performance improvement based on results: Is our field interested in adding value? *Performance Improvement*, 40(1), 6-10.
- Guerra, I. (2001b). *A study to identify key competencies required of performance improvement professionals*. Unpublished doctoral dissertation, Department of Educational Research, Florida State University: Tallahassee, FL.
- Kaufman, R. (1972). *Educational system planning*. Englewood Cliffs, NJ: Prentice-Hall.
- Kaufman, R. (1992). *Strategic planning plus: An organizational guide* (rev. ed.). Newbury Park, CA: Sage.
- Kaufman, R. (1998). *Strategic thinking: A guide to identifying and solving problems* (rev. ed.). Arlington, VA & Washington, DC. Jointly published by the American Society for Training & Development and the International Society for Performance Improvement.
- Kaufman, R. (2000). *Mega planning: Practical tools for organizational success*. Thousand Oaks, CA: Sage Publications.
- Kaufman, R., Herman, J., & Watters, K. (1996). *Educational planning: Strategic, tactical, and operational*. Lancaster, PA: Technomic Publishing.
- Kaufman, R., & Keller, J. (1994, Winter). Levels of evaluation: Beyond Kirkpatrick. *Human Resources Quarterly*, 5(4), 371-380.
- Kaufman, R., Keller, J., & Watkins, R. (1995). What works and what doesn't: Evaluation beyond Kirkpatrick. *Performance and Instruction*, 35(2), 8-12.
- Kaufman, R., & Lick, D. (2000-2001, Winter). Change creation and change management: Partners in human performance improvement. *Planning for Higher Education*, 29(2), 24-26.
- Kaufman, R., & Watkins, R. (2000, April). Getting serious about results and payoffs: We are what we say, do, and deliver. *Performance Improvement*, 39(4), 23-32.
- Kaufman, R., Watkins, R., & Leigh, D. (2001). *Useful educational results: Defining, prioritizing, accomplishing*. Lancaster, PA: Proactive Press.
- Kaufman, R., Watkins, R., Triner, D., & Stith, M. (1998). The changing corporate mind: Organizations, visions, missions, purposes, and indicators on the move toward societal payoff. *Performance Improvement Quarterly* 11(3), 32-44.
- Mager, R. F. (1997). *Preparing instructional objectives: A critical tool in the development of effective instruction* (3rd ed.). Atlanta: Center for Effective Performance.

- Peters, T. (1997). *The circle of innovation: You can't shrink your way to greatness*. New York: Knopf.
- Popcorn, F. (1991). *The Popcorn report*. New York: Doubleday.
- Watkins, R., Kaufman, R., & Leigh, D. (2000, April). A performance accomplishment code of professional conduct. *Performance Improvement* 35(4), 17-22.
- Watkins, R., Leigh, D., Foshay, R., & Kaufman, R. (1998). Kirkpatrick plus: Evaluation and continuous improvement with a community focus. *Educational Technology Research and Development Journal*, 46(4), 90-96.
- Watkins, R., Leigh, D., Platt, W., & Kaufman, R. (1998). Needs assessment: A digest, review, and comparison of needs assessment literature. *Performance Improvement*, 37(7), 40-53.



Roger Kaufman, professor and director, Office for Needs Assessment & Planning, Learning Systems Institute and Department of Educational Research, Florida State University, Tallahassee, FL 32306; research professor of engineering management, Old Dominion University, Norfolk, VA. E-mail: rkaufman@onap.fsu.edu.

Ryan Watkins, assistant professor of education, George Washington University, Washington, DC 20052. E-mail: r Watkins@gwu.com.

Ingrid Guerra, assistant professor, University of Michigan, Dearborn, School of Education, 4901 Evergreen Road, Dearborn, MI 48128-1491. E-mail: iguerra@umd.umich.edu.