*Planning for Success 2015 Case Study*

**Cape Cod Regional Technical High School Creates a Plan,**

**Shares Leadership, and Changes Culture**

**Superintendent**: Bob Sanborn, bsanborn@capetech.us

***Planning for Success* Facilitator and Case Study Author**: Lori Likis, lorilikis@ccoaching.com

**Associate Commissioner, Office of Planning & Research**: Carrie Conaway, cconaway@doe.mass.edu

When it was time to create a new improvement plan for Cape Cod Regional Technical High School, a single-school district, Superintendent Bob Sanborn knew he wanted a different approach. As Bob recalled, “We weren’t just trying to come up with a plan; we were trying to change culture at the same time.” When Bob learned about *Planning for Success*, he thought it might be the right model for his district: “I saw this presented in November at MASC (Massachusetts Association of School Committees). I was hoping to have a more focused, measurable strategic plan. At the same time, we were hoping to accomplish a far more collaborative process. We just didn’t do that the first time; [CCT’s previous plan was] administratively developed.”

CCT’s *Planning for Success* process yielded both a new district plan and a new focus on shared leadership at Cape Cod Tech. Encouraged by the successful work of the school’s inclusive Planning Team and the engagement of all school staff in this work, CCT created a new shared leadership structure at the school as a result of the planning process itself. The development of this shared leadership body, CCT’s Strategic Council, emerged as one of the district plan’s strategic initiatives that supported the new district plan objective, “Empower, develop, and retain staff.”

CCT’s Strategic Council, an outgrowth of the Planning Team, is a cross-functional team of teachers and staff members responsible for overseeing implementation of the district improvement plan. The Strategic Council will partner with the school’s Administrative Team, which consists of all administrators, to oversee the school’s annual action planning process and to monitor action plan implementation. At their first joint meeting, held at the conclusion of the planning process, the Strategic Council and Administrative Team established the norms, meeting structures, and decision-making processes that will guide these teams’ collaborative leadership work into the future.

**The Planning Team**: CCT’s Planning Team was an inclusive and representative one. The team included 16 members in total: two students, two parents, two administrators, two support staff members, three academic teachers, three vocational teachers, one guidance representative, and one school committee member.

**The Planning Process**: CCT’s planning process was approximately seven months, beginning in December and concluding in June. The process began with the Administrative Team, which met twice between December and January, for a total of 4 hours, vetting the *Planning for Success* model and process and participating in visioning about the future of the school. The Administrative Team then created the representative Planning Team and led visioning sessions with all staff of the school using the same protocol the *Planning for Success* facilitator had modeled with them.

The Planning Team, which was responsible for leading the development of the district plan and communicating with and engaging all stakeholders in that development, met four times over three months, between March and May. Planning Team meetings were held between 8:00 a.m and 2:00 p.m. with lunch, for a total of 20 working hours.

See the appendix to review the agendas for each retreat and participants’ reactions to the work at each stage—as well as their insights about the value and challenges of this inclusive planning process.

**Planning Team Feedback on the Planning Process**: In reflecting on the *Planning for Success* process at the conclusion of that process, CCT Planning Team members offered a range of insightful comments about the benefits of this planning work for the CCT community, the *Planning for Success* process itself, and team members’ own learning. A snapshot of these comments is included in the table below.

| **Evaluation Question** | **Selected Participant Evaluation Comments** |
| --- | --- |
| *In what ways, if any, do you believe this work benefitted CCT?* | * It gave an open forum to all stakeholders.
* I believe it will add cohesion to the staff.
* The process began the work of collaboration and empowerment.
* It sets a foundation for future planning.
* Gave the various constituencies a chance to voice opinions/concerns.
* I think this process allowed staff to voice concerns, commendations, and objectives for the future. Staff feel part of this process and are helping to “drive the bus!”
* I believe it gave some folks “back” their voice.
 |
| *Would you recommend this planning process and Planning Team approach to other districts? Why or why not?* | * As long as all voices would be heard and encouraged…YES!
* Yes. I believe it is simple to learn and difficult to go through.
* Yes – it took a gigantic process and broke it down.
* It is time consuming but can be beneficial to a district needing to reinvent itself.
* Absolutely, largely due to inclusive nature of the process
* Process is OK, but it needs (at least at CCT) another component that prepares the way for strategic planning.
* Yes. It has helped to rebuild trust and faith in the process of collaboration between admin and staff.
 |
| *What, if anything, did you learn through this experience? Would you volunteer to participate in such a process again?* | * Yes, I learned the power of a group to set a better course.
* How to work in a strong diverse group and maintain an active voice. Yes I would do it again.
* Again Yes! I learned much about teacher leadership and its importance.
* Perhaps.
* HOW to facilitate this process…which has been very interesting but complex!
* Not ALL educational processes are pointless acts of futility. Yes – I’d volunteer again.
* It is worth the hard work for the outcome.
* I learned I do not need to “go it alone.” Yes, I would volunteer.
 |

**Superintendent’s Reflection**: When asked to reflect on his district’s *Planning for Success* experience and the *Planning for Success* effort to make its DIY resources available for district use, Superintendent Bob Sanborn noted both his appreciation for that effort as well as his preference for an external facilitator leading this work. For Bob, having an external facilitator was critical and working with one as part of the piloting process had been an incentive for participation. “Someone from the outside to

help facilitate the process. Big selling point. Gives it some validity; in our case we had six teachers, support personnel, parents, students, administrators [all working on the planning]. To have another person up there rather than the administration was very symbolic. It puts everyone on the same playing field in the development process.”

When asked if he would recommend the *Planning for Success* model and process to other Superintendents, Bob said: “yes.” Bob described *Planning for Success* as a “very no-nonsense, intuitive way to go about it [district planning].” He described the plan CCT developed through its pilot project as “potentially the best one [plan] we’ve had. It wouldn’t have been the plan that came out of a meeting of the admin team. But that’s good.” When asked about the potential for impact of this district plan on student achievement, Bob commented, “I’m very, very hopeful that it will have high impact.” As Bob concluded, “In terms of quality—it hits all the areas we need to hit; now the devil is in the details.” Bob chose to continue the *Planning for Success* process at CCT by working with his staff to create the action plan that will guide implementation.

**Appendix: Cape Cod Regional Technical High School Case Study**

The following table identifies what the Planning Team did in each retreat and what some team members said about this work and specific activities.

|  | **Meeting Agenda** | **Selected Participant Evaluation Comments** |
| --- | --- | --- |
| **Retreat 1** | * Reflection on an inclusive planning process
* The *Planning for Success* model
* Planning process, team role, and schedule
* Visioning
* Synthesizing community visioning results to identify common themes
* School data presentation (by Superintendent)
 | * I thought it was valuable work. I like how your step-by-step approach formulated the process seamlessly. I feel it gave focus to our work and made the process powerful and effective.
* We are starting to hone in on the big issues facing our school through this process.
* I thought it was very informative and really enjoyed hearing what everyone had to say. It is good to have voice and be heard.
* It was much better than I had expected. I enjoyed the friendly conflict.
* Open honest dialogue.
* Extremely eye opening.
 |
| **Retreat 2** | * Root cause analysis of selected school data
* Identifying strategic objectives from the community’s feedback to the common themes identified in Retreat 1
 | * Tough but needed.
* Overwhelming. The process was excellent but nerve racking, but I hope it turns into a great plan.
* I loved the collaborative nature of the day. The insight and respect everyone displayed evolved into 5 powerful objectives.
* It was a great process to be a part of. Lots of great work done today getting to the five. Everybody had great input!
 |
| **Retreat 3** | * Debrief of the community engagement process conducted by the Planning Team after Retreat 2
* Identifying strategic initiatives from the community’s feedback
 | * Hard work, hard talk, but good day.
* It’s apparent that there have been more issues to discuss than were appreciated.
* Happy with the results! More work is needed though!
* Great – a lot of work in a small amount of time.
* Today could have been more productive.
* It was extremely productive.
* A lot of honesty was shared and a lot of details were discussed.
* Good “safe” place to talk.
* The conversation regarding what perceptions exist in this school was very important. Until we start being honest with each other, we will have difficulty moving forward.
 |
| **Retreat 4** | * Review/revision of draft strategic initiatives
* Quality review of the emerging plan draft
* Drafting the vision statement
 | * It was a large amount of work that requires a greater amount of feedback. It was good work!
* Covered a lot of territory.
* Productive and overwhelming.
* Productive but unclear of next step.
* Very positive.
 |