*Planning for Success 2015 Case Study*

**North Andover Public Schools Creates an Action Plan and**

**Builds Leaders’ Capacity for Monitoring and Publicly Reporting Progress**

**Former Superintendent**: Kevin Hutchinson (retired)

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When Superintendent Kevin Hutchinson first learned about *Planning for Success*, he was one of the first Superintendents to sign up for a pilot project. As a Superintendent who valued cohesive district planning, Hutch was interested in further developing his leadership team’s capacity to successfully implement North Andover’s existing district plan. Superintendent Hutchinson and his team used the

*Planning for Success* process to develop an annual action plan for the district, and the monitoring and public reporting system that would support it. As Superintendent Hutchinson observed, “Our leadership team was looking for a better way to document our work and to improve monitoring action planning. We found it with these tools and with our workshop facilitator, Lori Likis.”

At the conclusion of the action planning process, Superintendent Hutchinson asserted his belief that “the action plan has the potential for high impact on our district’s improvement. First of all, it improves the documentation of our focus by actually providing ways to focus even more. Secondly, it improves our measureable outcome documentation. Thirdly, it provides us with better tools for making our work public and understandable.” For Superintendent Hutchinson, the *Planning for Success* process also built the capacity and culture of the District Leadership Team: “As we gained knowledge, we thought of other applications to our work which pushed our thinking—no better way to build capacity and culture.”

**The Action Planning Process**: North Andover’s action planning process was approximately four months, beginning in November 2014 and concluding in February 2015. Action planning was conducted by the District Leadership Team, which met for three 3.5 hour retreats over this period to develop the district action plan and monitoring and public reporting system, a total of 10.5 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 action planning process.

**District Leadership Team Feedback on the Action Planning Process**: In reflecting on the *Planning for Success* action planning process, North Andover’s District Leadership Team members offered a range of insightful comments about the benefits of this work both for their district and for others. 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 your district and/or leadership team?* | * This pilot has put us on the path to success and increased achievement. Makes us all collectively more accountable.
* Helped us to narrow our focus and clearly articulate our process and product.
* It worked in helping us relating as a preK-12 district.
* The monitoring and reporting process revision was excellent. I believe we can use this.
* Was helpful in finalizing plans that in the past were only half completed, and making it likely the plan will be acted on rather than “shelved.” We will be more likely to implement initiatives, and will better monitor progress as well as our effectiveness as a team.
* Very much—collaborative process increased our practical knowledge. Focus on action items, process benchmarks, and early evidence is critical to impact.
* Gave us a better idea of the process required to stay focused.
* This work brought our team together as a group in a very beneficial way to improve both our practice and our culture.
* This benefitted our district team by encouraging collaborative work as a team and the importance of each stakeholder.
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| *Would you recommend this planning process to other districts? Why or why not?* | * Yes! Some of the best Admin PD we have experienced that connects with our strategic plan work.
* Yes—gave us structure, process, and product.
* Yes. Helps focus efforts on a concrete plan and tie all initiatives together.
* Yes—helps develop a clearer and more consistent focus.
* Highly! Engaging, focused, and worthwhile.
* I would. It helped me clarify what I need to do.
* I would recommend—if for nothing more than bringing team together around how goals are written and met!
* Without hesitation or reservation.
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**Superintendent’s Reflection**: When reflecting on his district’s *Planning for Success* experience, Superintendent Kevin Hutchinson said that he and his team “had hoped to benefit from a format that would better enable us to set measureable targets and to use the format to improve our documentation and discussions with all stakeholders.” According to Hutch, “all expectations were met and we have a better direction in which to improve our strategic planning work.” When asked how the monitoring process his team developed changed the way they worked together, he observed, “What we’ve found is that the improved monitoring process helps our team follow up with better focus and documentation.”

Superintendent Hutchinson’s offered one suggestion for improvement to the action planning process he and his team participated in: an extended time period. As Hutch noted, “My only suggestion would be to increase the amount of meetings to improve follow-up over the course of the entire year. Perhaps the district meetings could be the same amount but smaller teams could meet with the facilitator and other district teams to share/critique work.”

When asked if he would recommend the *Planning for Success* action planning process to other Superintendents, Superintendent Hutchinson said “yes.” He said that he would recommend *Planning for Success* to other Superintendents by asking: “‘Want to improve the focus and effectiveness of your strategic planning? Then, get involved in this work.’”

**Appendix: North Andover Public Schools Case Study**

The following table identifies what the District Leadership 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** | * Analysis of current district planning practices and culture (SWOT Analysis)
* Early evidence of change benchmarks
 | * PRODUCTIVE conversation with other administrators in similar roles. Format in the groups led to very effective and reflective discussion around practice, culture, and early evidence of change.
* Well organized and purposeful presentation and group work. Helped us reflect personally and collectively on application to our strategic plan.
* Productive conversations. Appreciated the SWOT analysis—great to see common trends.
* Good honest conversation and feedback—enjoyed the group work—got us out of our comfort zone.
* Great to be with the entire leadership team to all get on the same page. Great discussions.
* Useful to our purpose.
* This was a good start to beginning to understand the “evidence of change” concept. I’m hoping that this new information will be valuable to our action planning.
* The activities helped me get closer to my work partners. During the school day it is hard to leave as principal but the time was well spent.
* My general impression confirmed that I need to have more clarity on how district planning transfers in my role as A.P.
* I was much more engaged after the initial 45 min presentation. The day went well after.
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| **Retreat 2** | * Designing the monitoring process
* Digging deeper into early evidence of change benchmarks
* Action planning workshop
 | * MUCH more productive than the first session. I felt that we left with a product and better understanding of the process. Action planning workshop was a great exercise!
* Excellent and productive.
* I think this was a great opportunity to continue our work!
* It felt good to have honesty in knowing each other’s strengths and weaknesses—through strong dialogue. Affinity protocol was interesting—I’d like to try it with my teachers!
* Very helpful to my thinking and enjoyed the ability of our team to focus.
* Group feeling like progress is being made, which is always a good indicator. Time allowed for group work was very effective.
* Within each of these activities it was very beneficial to have conversations to better my understanding and to hear different perspectives.
* Somewhat confused with initial introduction and activity but good support with team.
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| **Retreat 3** | * Refining the monitoring and public reporting processes
* Refining the action plan
 | * Positive and productive.
* Well organized and structured.
* Affirming and enlightening—we are improving our collective understanding—focused well to get us there.
* Well structured time—organized around useful activities that resulted in productive work!
* Today was worthwhile in helping to build greater communication around goals and feedback.
* The session got our leadership team to focus and re-assess the strategic plan and our goals.
* I felt like today was actually more concrete and now clearer how we move forward—I also liked the protocol.
* Today helped me to put all the pieces together to see the interrelatedness of all of our work. This set the structure for all future work and it was done in a thoughtful and complete manner.
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