*Planning for Success 2015 Case Study*

**Valley Collaborative Creates a Plan, Builds Community Support,**

**and Professionalizes Its Culture**

**Superintendent**: Chris Scott, [cscott@valleycollaborative.org](mailto:cscott@valleycollaborative.org)

***Planning for Success* Facilitator and Case Study Author**: Lori Likis, [lorilikis@ccoaching.com](mailto:lorilikis@ccoaching.com)

**Associate Commissioner, Office of Planning & Research**: Carrie Conaway, [cconaway@doe.mass.edu](mailto:cconaway@doe.mass.edu)

Valley Collaborative is an educational collaborative that provides special education services to students referred by the Collaborative’s nine member districts. The Collaborative consists of an elementary school, a middle school, and a transitional high school, and provides adult programs and transitional job placement services. Formerly known as the Merrimack Special Education Collaborative, Valley Collaborative has been redefining and rebuilding itself under the leadership of Superintendent Chris Scott. As Chris observed, “We were in a unique position to create something brand new that comes out of a rich history of doing good work for kids and adults with special needs. We had a blank slate and could start again, start fresh.”

Through the *Planning for Success* process, the Valley community created the district’s first five-year improvement plan. While creating this plan for the future, Chris seized on the planning process itself as an opportunity to build broader community support, inviting parents, Special Education Directors, and School Committee representatives from member districts to participate. As Chris observed, Valley’s inclusive planning process brought a “deeper level of understanding for the leadership team as we traditionally know it but also in a broader community. It helped gel the work, gave it legitimacy. Now that people are so clear on what the mission is, it helps to get buy-in.”

Chris also saw the planning process as an opportunity to build the capacity of her team: “Our mission is all about high-quality programming for students and adults. It was helpful for people to articulate the vision and it unites the team; it makes people more conscious of the work and why we do what we do.” Chris found the *Planning for Success* process “helpful as a tool to professionalize the culture of the organization,” noting that “you have to spend a lot of time thinking about processes and procedures so you can develop a smart plan.” As Chris observed, a good plan is the result of “a good process and a good way to think about the work.”

**The Planning Team**: Valley Collaborative’s Planning Team was an inclusive team composed of approximately 25 members, representing all Collaborative stakeholders—staff, parents, School Committee members, community partners, and several Special Education Directors from the Collaborative’s nine member districts. As Chris observed, “For those Directors that committed to the process with us—they’re part of the Leadership Team indirectly. This process gave us an opportunity to get to know each other and understand where we’ve been and why certain decisions were made.”

**The Planning Process**: Valley Collaborative’s planning process was approximately six months, beginning in January and concluding in June. The process began with an introductory meeting during which the Planning Team reviewed the *Planning for Success* model and process, and discussed some of the unique issues the Collaborative faced in developing a district plan. The Planning Team then met for five 3 hour retreats between March and June to develop the plan, a total of 15 hours. Planning

Team meetings were held between 9:00 a.m and 12:00 p.m., followed by lunch. The Planning Team presented the school’s final district plan to Valley Collaborative’s Board in June. 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, Valley Collaborative Planning Team members offered a range of insightful comments about the benefits of this planning work for the Valley 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 Valley Collaborative?* | * Focused the work. * Invaluable to our growth. * This work gives us a tangible document to work from. * New vision statement. * We now have a plan of action. * Communication among the Valley Collaborative community solidifies common goals, aspirations, and plans. The group bonded in our commitment to the students and adults! * United community members to identify common vision and identify joint problems. Given Valley a clear plan moving forward. |
| *Would you recommend this planning process and Planning Team approach to other districts? Why or why not?* | * Yes. Creative and productive. * Yes. Gets all the neurons firing and great ideas result. * Yes—very helpful to have such a diverse group. * Yes—it’s very organized and streamlines the process. * Yes—effective, varied exercises. * Yes. Open ideas without prying!! |
| *What, if anything, did you learn through this experience? Would you volunteer to participate in such a process again?* | * Yes—great partnership and collaboration. * Yes—collaboration works. * I would volunteer to participate in a similar experience again. I learned the value in a slow and methodical planning process. * I learned about my school and its dedicated staff; the challenges they face and their resilience, and overarching commitment to students/adults in the various programs. * Valley is on a very successful path. I sure would. |

**Superintendent’s Reflection**: When reflecting on her district’s *Planning for Success* experience and the *Planning for Success* effort to provide DIY resources for district use, Superintendent Chris Scott shared her belief that an external facilitator can help increase the likelihood of planning success. Citing the “difficult conversations” that are part of a planning process, Chris observed that it is difficult to lead some conversations “if I’m in the mix; I need to be a colleague in this process.”

With a keen appreciation for the importance of implementation in the planning process, Chris has committed Valley’s Planning Team to continue working together to create an annual action plan. As Chris observed, “Getting these plans to work isn’t an academic process.” Her belief is that successful implementation requires both leadership and changes in culture. Chris asserted that to implement successfully, leaders need to ask, “What are the political, financial obstacles? Who will be responsible

for removing them? It’s the glue that holds it all together—takes master strokes of understanding where your strengths and weaknesses are in the organization.”

When asked if she would recommend the *Planning for Success* model to other Superintendents, Chris said “yes.” “The process definitely met my expectations. I’d give it a 10/10.” Chris found the *Planning for Success* process to be “very streamlined, organized. There are different methodologies for planning; this one was easy, straightforward, not overly complicated or convoluted. It helped to focus people on what was manageable.” In terms of time efficiency, Chris also observed that the *Planning for Success* process “is very time-consuming and labor intensive, but compared to other processes it’s not. It didn’t take an inordinate amount of time.”

**Appendix: Valley Collaborative 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** | * Visioning for the future (in small groups) * Identifying common themes and relevant data (across small group visioning results) * Designing the planning process: a preliminary discussion about communication and stakeholder engagement in the planning process | * Enjoyable, informative, encouraging. * Very relevant, positive, and effective. * Touching on things we never would have! * I felt invigorated and encouraged. * Significant amount of work completed; beneficial to have so many points of view from various stakeholders. * I very much enjoyed working backwards from a goal. I actually implement the same technique when post-secondary planning with my students. * Great sharing of ideas; productive exercises; good use of time and effort to focus vision. * I particularly enjoyed the Back to the Future protocol as it helped me mentally visualize where I believe the Collaborative should/could be at the end of this process. * The structure of the activities allowed for strong input from all. |
| **Retreat 2** | * Designing an inclusive planning process * Planning Workshops   Group 1: Setting outcomes  Group 2: Future program development  Group 3: Communication  Group 4: Stakeholder engagement   * Cross-group review and revision of Planning Workshop results | * Productive and creative. * Interactive—enjoyed breakout sessions. * It was great to dig into the issues in more depth. * The format was nice as it allowed for different topics to be addressed in a timely manner. * A lot of information seemed to get digested. More importantly, recorded. * Today’s session was very productive as discussion went off on tangents which actually added substance to the planned discussions. * A feeling of “the wheels are in motion.” |
| **Retreat 3** | * Review of work to date * Planning Workshops   Groups 1-3: Strategic objectives  Group 4: Drafting the vision statement   * Next steps in stakeholder engagement: a discussion about how members of the Planning Team would communicate and gather stakeholder visioning feedback | * Very productive, open exchange. * Great! It is always difficult work getting the perspective from many passionate, invested stakeholders but so IMPORTANT! * It felt like we were more focused—it was exciting to take next step in this process. * Long for sure. We could do it in shorter time. * Went well—I enjoyed having an outcome to the work. * Looks like the team is working in the same direction—shared vision. |
| **Retreat 4** | * Review of work to date * Update on stakeholder engagement: discussion of stakeholder feedback process and incorporation of vision feedback gathered from community after Retreat 3 * Planning Workshops   Groups 1-3: Identifying strategic initiatives  Group 4: Identifying outcomes | * No evaluation administered |
| **Retreat 5** | * Review of work to date * Quality review of the draft plan, including theory of action * Final revision of draft plan * Overview of the next step: action planning | * Heavy work!! * Exciting conversation. Left me with a lot to think about. * Very involved. Fantastic give and take. * Very thorough—in depth—could have been shorter. |