*Planning for Success 2015 Case Study*

**Webster Public Schools Redesigns its District Plan, Streamlines its Focus,**

**and Reenergizes its Leadership Team**

**Superintendent**: Barbara Malkas, [bmalkas@webster-schools.org](mailto:bmalkas@webster-schools.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)

**Central District and School Assistance Center (DSAC) Support Facilitator:** Tom Lamey

When Webster Superintendent Barbara Malkas learned about *Planning for Success* and the pilot opportunities available to districts, she was one of the first to sign up. The Webster Public Schools already had a district improvement plan but Barbara was interested in using the *Planning for Success* process to revise and redesign that plan with her District Leadership Team. As Barbara recalled, “This was truly revising the plan based on where the district is right now, without losing sight of the work we need to do.” As Barbara observed, “Revision is harder than starting from scratch; we’ve gotten some momentum to this point [with our original plan], but this [*Planning for Success* process] is about sustaining and getting the kind of traction that closes gaps.”

Barbara found that the *Planning for Success* process “served as a great way for the District Leadership Team (DLT) to have the opportunity to reflect on the work and to really think about the magnitude of the work they have accomplished as they decide what’s next, what’s the best way to service our students.” The redesign process resulted in a revised district plan that Barbara described as, “more streamlined; the conversation we’ve had so far has taken our strategic objectives and our indicators and really focused them. Instead of trying to do everything, we’re trying to create some focus.” The original plan’s five strategic objectives were redesigned to three.

In addition, Barbara found that the *Planning for Success* process not only helped streamline district focus but also helped build the capacity and morale of the District Leadership Team. When describing the impact of the plan redesign project on her district, Barbara recalled, “We were at a place where morale…it’s a lot of work. The district is in status, has higher levels of poverty. Hard and continuous work. We celebrate incremental progress but it doesn’t feel like you’re getting far enough fast enough.” In this context, Barbara found that the *Planning for Success* redesign process, “really reenergized the DLT, so we get away from the feeling of being a bureaucrat and checking things off the list.” As Barbara concluded “the *Planning for Success* model—diving into the data, really looking at where you’ve been and where you want to go—it taps into that passion for education. That goes a long way toward helping us with morale.”

In addition, Barbara observed that the planning process had her team “thinking in a different way,” and that “having the opportunity to think about the work in a different way has caused some growth and created some autonomy for decision making.” Barbara believes that the *Planning for Success* process impacted members of her team by prompting “an energy to want to learn how to apply the plan, according to the specific context of each school.”

**Partnering with DSAC**: A key partner in Webster’s redesign process was the Central DSAC, which provided support to Webster as a Level 3 district. Central DSAC’s Support Facilitator Tom Lamey

partnered with Webster’s Assistant Superintendent Andrew Kelley and the *Planning for Success* facilitator Lori Likis to organize and present a review of district data, and conduct root cause analysis of key data points with the District Leadership Team.

**The Plan Redesign Process**: Webster’s District Leadership Team, consisting of lead administrators, was the group charged with redesigning the district plan. The plan redesign process was approximately three months, beginning in March and concluding in May. The District Leadership Team met for three 3 hour retreats during this time to revise and redesign the existing district plan, a total of 9 hours. Additional work on the plan will continue in the 2015-16 school year.

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 planning process.

**District Leadership Team Feedback on the Planning Process**: In reflecting on the *Planning for Success* revision process, District Leadership Team members offered a range of insightful comments about the benefits of this planning work for the district 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 your district?* | * Provides a clearer path and next steps. * Much more organized. * I feel like the sessions helped us to better identify gaps that have been really hard for us to address. * It has helped us refocus and redefine what we think is important and how to get there. Our reconfigured model—the “stool”—feels much more doable and much clearer. * The work we did on this pilot gave us the time to rethink our work of the past. I feel we are reenergized to continue this hard work. * Re-evaluating some of the programs/policies we have had in place to talk about their effectiveness. * The time together provided us with the time we don’t often get to brainstorm our successes, failures, and challenges. * Time will tell. |
| *What, if anything, did you learn through this experience?* | * Trust the process and your colleagues. * Streamline and focus on community. * This DLT group is ready to tackle this project! * Our Admin Team still has it! * That issues and obstacles and challenges we face are not unique to any one school or one district. |

**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 Barbara Malkas commented on the benefits she experienced in working with an external facilitator: “Sometimes it’s easier to do that work with a facilitator who’s not from the district—that frees up people to be participants as opposed to being a facilitator. As a superintendent, I evaluate everyone

who’s sitting in the room. So their ability to speak freely and push back on anything I might say is dependent on the relationship.” As she concluded, “Having a TA facilitator/provider allowed me to release the outcome. That meant it’s not ‘Barbara’s plan’—it’s the district plan and weaves together a

lot of voices. So I was definitely looking for some support that would allow me to be an equal participant instead of a facilitator of the improvement planning.”

As Barbara stressed, district improvement “can’t just be ‘how will we improve achievement to get us out of accountability status’—it really needs to be about the environment you create in your district.” She appreciated the way in which the *Planning for Success* process tapped into the passions of her school leaders, noting, “Education is bigger than what level your district is.”

Barbara stressed the importance of the *Planning for Success* focus on “what matters” rather than compliance:

This isn’t my first time being involved in a planning process, but my experience has been that other processes were exercises in task completion instead of an opportunity to identify and specify what we are going to be about. That’s what *Planning for Success* has been able to do for us—say what is the MEANINGFUL work that’s going to get us where we want to be? As opposed to what we should be doing, which became about compliance as opposed to engagement. Compliance vs. engagement isn’t just about the kids; it’s about the adults, too!

When asked if she would recommend the *Planning for Success* model to other Superintendents, Barbara said, “Definitely. I would say it is a process for school Superintendents to develop district plans that will energize and focus their work for their entire district on what matters.”

**Appendix: Webster 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. Retreats are listed in chronological order.

|  | **Meeting Agenda** | **Selected Participant Evaluation Comments** |
| --- | --- | --- |
| **Retreat 1** | * Analysis of current district planning practices and culture (SWOT Analysis) | * Promoted good conversation. * Good conversation facilitated with opportunities for agreement/disagreement of questions. * Great conversations—what next? * It made me look differently at our decision making practices. * Well spoken concerns, opportunities, threats not voiced frequently. * The revision of work in progress may be more difficult than developing from scratch! * It is tough looking at the Improvement Plan—reminds us of all the work that needs to be done. |
| **Retreat 2** | * District data presentation * Root cause analysis * Inventorying the district’s current work | * Brain stretchers. * Informative, eye opening. * Insightful, meaningful, reflective. * Good discussions driven by data and very effective protocols. * I think it was a reality check and helped to re-focus attention to our areas of need in the district plan. * The data analysis was confusing. * We did great work! * Loved it! * I feel that it went well—it is good to get out the initiatives we work so hard on every day and see where they would land in the strategic plan. |
| **Retreat 3** | * Review of root cause analyses * Revising the plan’s strategic objectives and strategic initiatives | * Productive, reflective. * Inspired. * It provided us an opportunity to dig deeper into the challenges that are ahead of us. * The group was open and honest in collaborating about redesign plan. * The day’s focus and opportunity for collaboration was not only excellent and appreciated—but also well overdue and needed. * I thought the format and organization of the afternoon was conducive to expanding our thinking about the strategic planning process and revision. * It was difficult to figure out how to get started but we landed in a   great place.   * Slow start, great finish! Blueprint has been accomplished. |