*Planning for Success 2015 Case Study*

**Whitman-Hanson Regional Public Schools Creates a Plan and Builds**

**Community Support to Achieve Its Vision for Students**

**Superintendent**: Ruth Gilbert-Whitner, [Ruth.Gilbert-Whitner@whrsd.k12.ma.us](mailto:Ruth.Gilbert-Whitner@whrsd.k12.ma.us)

***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)

When Superintendent Ruth Gilbert-Whitner was planning to move forward with creating a district improvement plan, she knew she was looking for a different type of planning process for her district.

“I’ve been through strategic planning in districts a half dozen times. I’ve seen it work well in some instances and not in others.” As Ruth concluded, “I knew I didn’t want to do what we did before…The last thing I wanted to do was to bring in 45 people over three days to develop a strategic plan.”

When Ruth learned about *Planning for Success* at the MASS/MASC (Massachusetts Association of School Superintendents/Massachusetts Association of School Committees) Conference in the fall of 2014, she recalled, “I was taken by the organized system for district planning.” Ruth observed that she was “impressed by the clarity of the *Planning for Success* model—it seemed less bogged down in paperwork and jargon [than some other approaches to planning]; it seemed to focus on what we’re trying to do here.” As she observed, “We’re not a well-funded district, so it’s extremely important for us to communicate our needs.”

Whitman-Hanson’s planning process is still underway at this time, as district leaders prepare to advance the process by taking a draft plan back to staff and into the Whitman and Hanson communities.

**The Planning Team**: Whitman-Hanson’s planning process thus far has engaged both the District Leadership Team and the district’s larger Administrative Team. The District Leadership Team consists of approximately 10 members, including principals and district academic administrators. The Administrative Team consists of approximately 35 members, including principals, assistant principals, curriculum coordinators, and all district administrators.

**The Planning Process**: Due to weather and other extenuating circumstances, Whitman-Hanson’s planning pilot spanned eight months, beginning in March 2014 and concluding in October 2015. The district will continue its work on the plan—engaging the Whitman and Hanson communities and staff members, setting outcomes, and identifying priorities for implementation—through the fall of 2015.

The planning process was shared between the District Leadership and Administrative Teams. The District Leadership Team met for three 2 hour sessions between March and early June, a total of 6 hours. The District Leadership Team launched the planning process and sessions to envision the district’s future. District leaders conducted visioning sessions with all schools and departments between April and June 2015.

The Administrative Team met for one 3 hour retreat at the end of June, and two 2 hour retreats in September and October, a total of 7 hours. The Administrative Team led the identification of strategic

objectives and initiatives, building the district plan in response to staff members’ visioning work. The team also closely examined which improvement issues were within district control and which were dependent on increased funding, and created a staff and community engagement process.

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.

**District Leadership Team and Administrative Team Feedback on the Planning Process**: In reflecting on the *Planning for Success* process at the conclusion of the pilot project, members of Whitman-Hanson’s leadership teams offered a range of insightful comments about the benefits of this planning work for the 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 the Whitman-Hanson public schools?* | * We have a draft district plan. * Amazing, established district strategic plan. * Given us a chance to establish our values and articulate what matters to us. * Provides us with a framework to organize our next steps. * A roadmap for growth and success. * Helped us focus our priorities. * Shared vision. * Refocused on the priorities, needs, and hopefully positive outcomes for our district. * Provided more defined focus on the direction of the entire district. * I believe it helped us find a common set of goals for the future. * Everyone is on the same page. Discussion was thought provoking. * I believe that all stakeholders were given an opportunity to be heard and to give feedback in all areas making this a true team effort. * This has enabled great conversations to occur among administration. * It has brought the whole admin team closer together. * It allowed input from many different levels. * We have tackled difficult and long standing questions/issues through our discussions. * Brought all leaders to be in support of one plan. * It has been a comprehensive inclusive process involving staff and administrators. * Kept it focused. * In the end, all the small pieces over the different meetings have been brought together for a comprehensive and well thought out plan. |
| *Would you recommend this planning process and approach to other districts? Why or why not?* | * Yes—it made people think about what is important. * Yes—methodical and well done. * Yes—it helps organize thinking and puts objectives in a priority based design. * Yes, the step by step approach made for a very clear objective. * Yes, streamlines the entire process. * Yes—streamlines the process and is inclusive (teachers, admin, leaders, etc.) * Yes. Because it offers other opinions. * Yes. All of the administration should have a say and share ideas on district policies. * Absolutely. I especially liked the self-select structure. * Yes. It seemed to be a comprehensive approach and brought a structure to the process. * Yes—valuable experience. Well focused. * Yes. Broke the process down into effective chunks. * This type of exercise is helpful for all organizations. * I think the organization model was well worth the time. * I would recommend the complete process. * Yes, I would recommend this because of the approach taken to get to the end result. |
| *What, if anything, did you learn through this experience? Would you volunteer to participate in such a process again?* | * Very reflective and multi-layered process. * Yes. * I would volunteer again. I think it was important to have an outside consultant. * Perhaps. * Show template at beginning of process, will align participants sooner and streamline focus/conversations. * Yes. * Sure. A positive process. * No—time commitment. * Yes. Importance of using protocols. * I learned the perspectives of different stakeholders. * I learned many things about putting together a strategic plan. * Take little steps and build all into big picture. |

**Superintendent’s Reflection**: When asked if she would recommend the *Planning for Success* model to other Superintendents, Ruth said, “I would—time has been well spent.” Ruth cited the value her leadership team found in the *Planning for Success* process, noting that “we have a diverse leadership team that was all willing to participate” because of that value.

District leaders’ participation was particularly noteworthy at the end of the last school year, as the team considered how to engage the greater school community in the planning process. As Ruth recalled, “we were trying to discern a way to gather stakeholder feedback. But we knew gathering a lot of people would be problematic at that point in the year.” So principals agreed to conduct a visioning protocol, which had been modeled for them during the planning process, with their faculties. As Ruth recalled, “seven different people, with different styles, did it [the visioning protocol] and did it well . . . And now everyone [in the district] knows what we’re talking about.” As Ruth reflected, “The fact that principals did this speaks to the power of the model.”

Ruth also commented on what she believed to be the value of learning about the *Planning for Success* process from colleagues who have experienced it: “You need people like me to be able to tell others: this is worth the time.” While appreciating the development of the *Planning for Success* resources that districts may use to facilitate their own planning process, Ruth also cited the value of an external facilitator for her. She observed, “People are overwhelmed by online resources; they don’t know where to start.”

As she reflected on her district’s *Planning for Success* experience, Ruth found that it has “been [even] better than expected.” She observed that the “tone was positive. People opened up and discussed issues and frustrations. And this has only gotten better over time.” Most importantly, Ruth found that the *Planning for Success* process “has been flexible enough to let me as a Superintendent do what our district needs.”

**Appendix: Whitman-Hanson Regional Public Schools Case Study**

The following table identifies what the District Leadership Team (DLT) and Administrator Team (AT) 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** |
| --- | --- | --- |
| **DLT**  **Retreat 1** | * *Planning for Success* model * Analyzing current district planning practices and culture (SWOT) * Designing the planning process | * A positive viewpoint of planning. The information at the beginning provides a good mindset of the process. Backwards design being the goal. * Organized and on task. Useful, thought provoking. * Cohesive, coherent, well planned, well paced. Excellent. Clear direction of where we need to go. * Gave time to reflect/share as a team and dialogue about what process could help WH. Good to think about “solutions” from this planning process. * It was better than expected. I wasn’t sure what to expect or where it was going. * The session was well organized. The objectives were explained clearly and the session stayed to the agenda. It was beneficial sharing the SWOT results with the Leadership Team. The SWOT activities were designed to evoke active and thoughtful responses. * Once we spoke about DRT (District Review Team) visit, group saw how we can take what we know to be good and work with that for something better. |
| **DLT**  **Retreat 2** | * Visioning the future of the district * Review of SWOT results | * Helpful, informative, and good discussion. * Very useful. Helped to create a focus of where to go. Hard to vision 3 years out knowing today’s realities. * Produced some ideas of engaging communities in a way I hadn’t thought of before. * Great activity for fostering conversation. Provided good format for open conversation. Provided the team with a foundation for future discussions at multiple levels and with a variety of stakeholders. * Good ideas, especially regarding how to include community members in planning. * Very useful. Super discussion. Good use of time. Felt great to respond and put real issues on the table for discussion. |
| **DLT**  **Retreat 3** | * Reflections on the community visioning process (which DLT members led with staff after Retreat 2) * Synthesizing visioning results and identifying common themes | * Today’s session was valuable. Great process. Discussions provided common goals. * Good opportunity to see all school results to get a better picture of WH. Good discussion around measures. Excellent. * Great to see all individuals’ input come together as one group of vision. * Important to synthesize district staff responses. A lot of district-wide info was produced today. How to address all of it. What’s priority—what’s first? * Well organized. A good use of time in collecting and analyzing data. The protocol format provides structure to our conversations and data for future decision making. |
| **AT**  **Retreat 1** | * *Planning for Success* model * Process to date * Review of common themes from community visioning (identified by DLT in Retreat 3) * Applying the Authority Bulls-eye to the common themes * Themes within our control * Planning workshops   Group 1: Strategic objectives  Group 2: Funding  Group 3: Community outreach | * Productive, well organized, and specific to our district. * Very informative. Excellent group exercises. Helped to think about district as a whole. * Organized and goal oriented. * Today’s session was a step of bridging the current state/practices of the district with the needs/wants of change within our control. * I have found each step of this process to be beneficial. * When I see the activities as written, it is hard to imagine how valuable each one is. In moving forward, I think it will be important to other districts not to “water down” the process. Each step brings us closer to a final process. * It was helpful to brainstorm in groups and hear what others in the district thought about the state of the district and how to move forward. * Good collaboration and creative thinking across district levels of administration. * Great, highly focused group exercises. Thought we accomplished quite a bit. Bulls eye was quality endeavor. |
| **AT**  **Retreat 2** | * Review of the process to date * Planning workshop: Strategic objectives * Planning workshop: Strategic initiatives | * Productive start to the creation of the plan. * Great conversations—helped me to begin to “see” the larger plan. * Becoming more detailed and “visible” as we get deeper into the process. * Very productive. Great interactions and input. Excellent use of time. A great deal accomplished in 2 hours. * I do think the overall goal is good. The amount of steps/time it is taking to get there is difficult at times to keep focused. * Once common languages and thoughts applicable to WH were established, things went well. Believe the “structure” of the plan has been built. * We were able to accomplish our overall objectives for moving forward and change the language to be more user friendly for the community. * Very valuable to think specifically about the words chosen and the stakeholders impacted by these decisions. |
| **AT**  **Retreat 3** | * Draft plan review and revision * Next steps in the planning process:   Engaging community  Engaging staff   * Planning for data and root cause analysis work | * Productive and worthwhile. * Clear and concise. * Very useful—great conversations. * Outstanding. * Productive, important, timely. A roadmap for growth. * Session was informative, collaborative, and great use of our time. * Today’s session was productive and I appreciated being part of the process. * This was the best of the workshops. * I felt that this was an opportunity for everyone to engage in conversation on equal turf. * It was well organized. A lot of us contributed great feedback and took ownership. * Went very well. All workshops that have been done have tied nicely into steps of plan. |