The Problem with
Annual Improvement Planning

Robyn Jackson

Have you ever made a beautiful School Improvement Plan (SIP) for the year, detailing all the things you want to accomplish for your students, only for "life" to get in the way?

In fact, one of the biggest threats to most yearly SIP plans is "life." And that's the first problem with annual planning. While your SIP maps out a steady pathway to success, life is just not that predictable. Things crop up—an influx of new students you weren't expecting arrives, a key teacher unexpectedly takes leave in the middle of the year (or resigns), a global pandemic shuts down school. If you create a plan that expects success to take a predictable path, you are setting yourself up for failure. Even the mundane day-to-day challenges we face can threaten to derail our tidy, predictable plans.

The second problem is that annual planning situates improvement as something that's far off in the future. There's no sense of urgency. We often plan in the summer for success we won't reasonably expect to see until sometime the following spring. With no sense of urgency, we end up caught up in the day-to-day responsibilities and putting out fires. We end up "back burnering" those very tasks that would move us closest to achieving our vision.

The third problem is that annual planning fails to take into account all that we will learn along the way. When we create a yearly plan, we are working from the best data we have at the time. But as the year progresses, that data quickly becomes outdated. Once the plan is set, we rarely go back and make meaningful changes to it for fear of looking like we're hedging—or because we become too busy.

A More Realistic Way to Plan

For these reasons, I no longer teach school leaders how to create better SIP plans. Instead, I encourage everyone to plan in 90-day cycles. This

Shorter school planning cycles can boost focus and responsiveness.

has at least four big advantages.

First, 90-day cycles are way more predictable than annual plans. It's a lot easier to accurately forecast what actions you will need to take over the next 12 weeks than it is to predict what actions you will need to take over the next 12 months. So much can change over the course of a school year, from a sudden influx of new students to the district shifting directions and placing new demands on you. There's no way to predict what surprises will come your way or how you'll have to adjust. Planning in year-long cycles actually makes you vulnerable to every new challenge you face because once you create a plan for the year,

Regular, effective meetings are designed to help you reach your goals *despite* day-to-day demands.

you're saddled with it. Planning in 90-day cycles allows you to make adjustments without having to invent a whole new plan for a new reality.

Second, 90-day planning allows you to take advantage of what you're learning throughout the year. At the end of each 90-day cycle, you can take a step back, examine what you have learned—for instance, how the new scheduling plan is working—and use that knowledge to make your next 90-day plan even more effective. As a third advantage, 90-day planning allows a school staff to experience "wins" throughout the year—as some positive results surface—instead of waiting until the end of the year to acknowledge success. Rather than putting off celebrating improvement until June, school staff can see you're getting better and better throughout the year.

Fourth, a 90-day plan helps you focus on less so you can achieve more. Often, an SIP plan is so unwieldy, it's hard to get started. A 90-day

plan helps you focus on removing your biggest constraint so you can make *more* progress throughout the year.

Powering Up Your Plan

Not all 90-day plans are created equal. To create a powerful short-term improvement plan, you need the following elements.

A Goal that Tackles the Right Problem

Ask yourself, *what's the one problem or challenge that, if solved in the next 90 days, would have the biggest impact on your ability to achieve the school's ultimate vision for students*? Note that your biggest constraint may not be your biggest frustration; that frustration may simply be a symptom of your biggest constraint.

For instance, you may be very frustrated that your benchmark test scores aren't moving despite all the PD and resources you've given teachers. That's the symptom. But the real problem is always more complex. It might be that teachers aren't teaching to the standards or providing students with the right scaffolds to help them achieve the standards. Perhaps students don't understand the test vocabulary. Spend time investigating what's really holding you back—so you can eliminate it. That might mean watching students as they take the test to understand when they get stuck or conducting a focus group so students can tell you where they struggle. The idea is to go beyond the typical "data dives" to really understand what's keeping students from being more successful.

Once you've identified your biggest constraint, make *that* the focus of your 90-day plan. Often, we set a goal and ignore existing constraints that make achieving it impossible. Sure, we'd love to see all our students reading by grade 2 and we can implement all the new reading strategies we want. But if we don't understand what's currently keeping all our students from reading by grade 2, then adding a new strategy just means more work, more frustration, but few gains.

Your 90-day plan will focus on just one thing. I know there may be multiple issues at play, but by prioritizing your biggest constraint and removing it first, you'll see greater gains than if you try to attack several constraints at once. With everything else you have to deal with during the course of your day, focusing your 90-day plan on *one* thing will help you stick to it and not become overwhelmed.

A Scorecard

One of the biggest flaws I see in most planning processes is that a school community creates a plan, identifies a goal, and even zeroes in on specific data they want to move—but then doesn't keep score. In sports, the only way you know who won a game is to keep score. In school improvement, the only way you know you're making the right difference is to keep score. One of the first things I do with my clients is create a scorecard, a way to keep track of the data points they've chosen.

When many school leaders identify data points to reach, they make the mistake of only identifying *lagging* indicators—but if you really want to stay accountable to your goals, you need to identify and monitor *leading* indicators. Leading indicators are data that can lead to a result, data over which one has some control. For instance, if I wanted to lose weight, a leading indicator might be how many calories I eat each day. Lagging indicators are the results themselves—a lagging indicator might be how much weight, if any, I've lost each week. Lagging indicators are data after the fact that it's too late to change.

Many administrators only look at lagging indicators—student test results, suspension data, and so on. But if we looked at more leading indicators, such as how students are performing on formative assessments or how many non-academic touch points we have with students each week, we could possibly make adjustments in time to influence lagging indicators.

The more progress you make on moving your leading indicators, the more likely you'll see desired results on the lagging indicators. A

good scorecard needs both. If you focus only on leading indicators, you have no way of knowing whether your specific actions will make a *lasting* difference. Focusing only on lagging indicators, you won't find out whether you reached your goal until it's too late to do something about it.

A "Meeting Rhythm"

The secret weapon that will ensure you stick with your plan and see results is something so mundane, so boring, that I'm almost embarrassed to suggest it here. Yet I know nothing more powerful for helping you stay on track, keep focused, and actually hit your goals than

what I call a meeting rhythm, a regular and frequent cadence of meetings. It's the best way to keep you and your team committed to achieving your 90-day goals, even when "life" gets in the way. If you don't regularly revisit your plan, check progress, meet new challenges as they arise (instead of waiting for them to fester), and make necessary adjustments along the way, you will lose momentum. Even the best crafted plans will stagnate and die.

A meeting rhythm helps you and your core team take what you're learning during the process and immediately apply it to make the entire process better. Don't burden your entire

staff with these meetings; just include key team members who are guiding this effort. Keep the group small and focused. To stay accountable to your plan, here's the meeting rhythm I've found most valuable.

■ Daily (15 minutes): During this meeting, everyone on your key team checks in and reports on what they've done that day to advance the goals of your 90-day plan. Focus only on actions tied to your plan. This helps ensure that everyone is keeping their commitment to take daily action toward the goals.

■ Weekly (60–90 minutes): This meeting is where you'll surface and resolve any challenges that come up and where you'll review your scorecard and make any adjustments needed to ensure that your plan makes steady progress.

■ Monthly (60–90 minutes): Here is where you'll take a step back and look at whether you're making sufficient progress toward your goal. In this meeting you'll reflect on what is and isn't working and make significant adjustments based on that learning to better achieve your 90-day goals.

You may not think you have time for another meeting, and you may be right. *Make* the time by canceling other unproductive meetings. One big reason many of us are better at making plans than at executing them is that we get so distracted by the urgent that we lose sight of the important. Regular meetings keep you focused on what's vital. They're designed to help you reach your goals *despite* day-to-day demands.

90-Day Planning in Action

Let's explore what this looks like in an actual school. Keith (a pseudonym) was a principal at a large high school in South Carolina. Keith's district hired me to coach him and his leadership team because at the time, his school was very low performing. He and his team wrote a SIP plan each year as was required, and he worked hard to nudge his students' scores upward on the district's end-of-course exams (which were standards-aligned and mirrored the standardized tests students would face). The school's passing rate on these exams was around 45 percent, so on average, 55 percent of students failed end-of-course exams (and thus failed that course and had to repeat it or attend summer school). When Keith was being honest, he'd admit he usually chose SIP targets that were easily met so he wouldn't have to face his district in the spring having failed to hit his goals.

When I first started working with Keith, he was setting SIP goals like: "By the end of the 20XX school year, we will have increased the percentage of students who pass their end-of-course exams from 45 to 48 percent,

a 3 percent increase over the previous year." He'd have data meetings with his staff, identify the "bubble kids" who could be easily moved, institute some remedial measures to increase students' scores, do a little benchmark testing to ensure he was making progress (tweaking things if he wasn't), and pray it was enough to show gains on the state tests each year.

Once we worked to establish a school vision that included 100 percent of his students, Keith knew that a paltry three percent gain each year wasn't going to cut it. (For more on how a school leader can develop a powerful vision statement reflecting a concrete goal, see my article "The Most Powerful Tool in a Principal's Arsenal" in the April 2021 *Educational Leadership*.) Yet, writing a SIP plan that set a 25 percent increase on proficiency felt too daunting.

I urged Keith to simply focus on the next 90 days. We analyzed his student-achievement data, teacher-observation data, and school-climate data. Instead of looking for areas where the school or its data could grow, we looked for

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sources of friction stifling growth. That turned out to be the key difference. You see, Keith and his staff were working *very* hard; we counted 17 different initiatives that had been started in his school in the last 18 months alone, including a 9th grade academy, a schoolwide PBIS program, and new Advanced Placement and honors level courses. Plus, he and his staff were applying to become an International Baccalaureate school.

The biggest source of friction was that all these initiatives were operating independently, with no common focus driving the work. Not only were there many silos in the building, there were redundancies in the work people were doing. For instance, many of the strategies that helped students in the Advancement Via Individual Determination (AVID) program could've been helpful in the new honors and AP courses but weren't shared across the school.

So rather than spend the next 90 days adding a new strategy or tactic, Keith and his team spent the next 90 days *removing the biggest constraint* keeping Keith from his goals—the lack of coordinated efforts. A small team followed the meeting rhythm listed previously. They mapped out on a whiteboard all the initiatives they were working on at the time. Each program lead explained how their program worked, and everyone discussed areas of overlap. The team identified the "why" behind all their efforts—to build a rigorous instructional program accessible to all students—and combined all the initiatives under the umbrella of "rigor," using a definition of rigor I've developed. Whether a teacher taught AVID or AP classes or guided students

in a 9th grade academy, all educators were expected to do the four key things under this definition: ensure that students make meaning for themselves, impose structure on information, integrate individual skills into processes, and apply what they learn to real-world or novel contexts.

This team set as their first 90-day goal aligning all their programs and increasing the number of rigorous learning experiences. They created a scorecard measuring things like how many classrooms the team members visited weekly and whether they saw the four things depicting rigor in each classroom (their leading indicators). The scorecard helped them focus on what was really important, monitor progress, and make adjustments in real time during the 90 days.

If Keith's staff had spent a whole year trying to push through changes toward more rigor to meet some year-

end goal, they wouldn't likely have progressed much, because the lack of coordination among the initiatives presented a *huge* stumbling block. But by spending time early in their 90 days eliminating redundancies and getting everyone to work together in an organized way, they were able to find new energy and adopt strategies that made kids successful. Sharing work and ideas got more of the staff invested in the programs. They found ways to all work better on behalf of students and were able to beat their year-end goals for students passing end-of-course exams. Faculty felt energized to continue taking on challenges for the next 90 days—and the next.

Why Wait for Victory?

I've seen in working with schools that when a school shifts from year-long planning to 90-day planning, key practices and indicators of student learning in that school often get better every 90 days. Every 90 days, school adults together eliminate another big constraint and get closer to their set goals. When a group of educators sees a victory every 90 days, those victories are cumulative. Not only do educators see they're getting closer to the vision for their school, they learn important lessons along the way that can be leveraged during the next 90 days to get even better. ◉

Robyn Jackson (robyn@mindsteps. com) is the CEO of Mindsteps Inc. She is the host of the School Leadership Reimagined podcast and the founder of Buildership University, where she coaches school administrators worldwide. She is the author of 11 books, most recently *Stop Leading, Start Building* (ASCD, 2021).