

DURHAM DISTRICT SCHOOL BOARD ADMINISTRATIVE REPORT

REPORT TO: Durham District School Board

DATE: April 17, 2023

SUBJECT: Update: Strategic Planning Process

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1.0 Purpose

The purpose of this report is to provide the Board of Trustees with:

1. An update on activities related to the Strategic Planning process since the last update on November 21, 2022, and;
2. A recommendation to extend the existing Ignite Learning strategic plan through to December 31, 2023 to allow sufficient time for the consultation and development process of the new multi-year strategic plan.

2.0 Ignite Learning Strategic Priority/Operational Goals

Success – *Set high expectations and provide support to ensure all staff and students reach their potential every year.*

Well-being – *Create safe, welcoming, inclusive learning spaces to promote well-being for all students and staff.*

Leadership – *Identify future leaders, actively develop new leaders and responsively support current leaders.*

Equity – *Promote a sense of belonging and increase equitable outcomes for all by identifying and addressing barriers to success and engagement.*

Engagement – *Engage students, parents and community members to improve student outcomes and build public confidence.*

Innovation – *Re-imagine learning and teaching spaces through digital technologies and innovative resources.*

3.0 Background

School Boards in Ontario are responsible for the development, implementation and ongoing monitoring of a multi-year strategic plan. These plans set the direction for the District's work, based on the mandate of the Board of Trustees. They typically span 3-5 year timeframes and include an annual reporting component. The Durham District School Board's (DDSB) current multi-year strategic plan, Ignite Learning, was adopted in 2018. In 2020, due to the COVID-19 pandemic, the Ignite Learning strategic plan was extended through to September 2023 through a resolution of the Board. Initiatives aligned with the current strategic plan continue to be advanced by staff with a focus on student learning and well-being, and people and culture. Staff develop operational plans to implement the direction set by the multi-year strategic plan.

The work to establish a new strategic plan began in the fall of 2022. Reports were presented to the Board of Trustees for information on October 3 and November 21, 2022. The Request for Proposals (RFP), to select an external consultant, was published through December 2022 and January 2023. In February 2023 a working group was formed to consider proposals and select a consulting firm. The working group was made up of four trustee members, the Director of Education, the Executive Lead of Strategic Initiatives and External Relations, and the Manager of Purchasing and Distribution Services. Together the working group determined that external consultant Maximum City, was the best fit to support trustees through the strategic planning process.

4.0 Analysis

Introductory and Visioning Sessions

An introductory session for Trustees and Student Trustees with Maximum City took place on March 1, 2023, with a focus on the following:

- Fundamentals of multi-year strategic planning, including the role of trustees in the process, components of a strong strategic plan and the phases of strategic plan development;
- Best practices of strategic planning development and consultations;
- Timeline; and,
- Proposal for a path for the work.

Visioning sessions have since taken place on April 12, 2023, where Trustees, Student Trustees and senior staff had the opportunity to engage in workshops guided by the consultant to review the current plan, share aspirations, identify priorities for the next term, and work towards a draft direction for the new strategic plan.

Guiding Principles and Understanding the Strategic Planning Process

Module 6 of the Ontario Education Services Corporation's (OESC) Professional Development Program for School Board Trustees (included as Appendix A and referenced as 'Module 6' throughout this report) outlines the importance of understanding that a Board's strategic plan is more than just a mandated process. "An organization's strategic plan is the master of other plans – it provides an overall strategic direction to the organization. It also gives guidance for success in specific areas such as financial strategy, media and communications strategy, human rights compliance, organizational development strategy and human resources strategy." Further, "effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will assess its success."

Module 6 suggests the following for inclusion in an organization's strategic plan:

- A shared vision and mission;
- Clear values and beliefs that will drive actions;
- A small number of strategic priorities that will drive the organization;
- Results or outcomes congruent with these priorities;
- Respect for human rights and equity for staff and students;
- Accountabilities and performance measures for tracking progress in equity of outcomes for students and staff;
- Alignment of resources – a balance between strategies and budget;

- Key success indicators;
- Strategy for monitoring progress;
- A framework for leadership and accountability;
- Alignment of policy with strategic directions;
- An effective communication strategy; and
- Provision for continuous capacity building throughout the school board in order to obtain end results.

During the term of the previous strategic plan, the DDSB exercised bold leadership in the approval of the Human Rights, Anti-Discrimination Policy and the Indigenous Education Policy in the interest of securing high achievement, positive mental health and well-being, advancing equitable outcomes and ethical leadership and innovative practice.

Working Groups

Following discussion with trustees at the March 1, 2023 introductory session and April 12, 2023 visioning session, a trustee working group comprised of trustees, student trustees, the Director of Education, both Associate Directors, the Executive Lead, Strategic Initiatives and External Relations and coordinated by Maximum City as the consultants has been formed to guide the strategic plan consultation and development process.

The trustee working group through the Director of Education's role as Secretary to the Board will report to the Board of Trustees regularly throughout the strategic planning process. In addition, a staff working group with the consultant has been formed to ensure effective resourcing and coordination of the consultative process, communication plan, operational alignment and the back-end work required to develop the strategic plan.

Timeline of Activities

Module 6 defines the strategic planning process using the following graphic:



DDSB's tentative timeline is noted below:

- April 2023: Establish Trustee-led working group to guide the critical path, including the approach to data strategy and broad consultation; establish staff working group to ensure effective resourcing, coordination and operational alignment;
- March/April: Conduct environmental scan to understand the direction of strategic plans across the province;
- Late April: Draft direction of strategic plan (staff working group to lead);
- May: First round consultative process (gather feedback from trustees, students, families, staff, partners, community);
- June/September: Re-draft direction based on data and feedback collected through the development and consultative process;
- September/October: Second round of consultation and feedback received from trustees, students, families, staff, partners, community;
- Final report to Board for approval in November 2023;
- Additionally, the Board will receive updates of the work at the April, May and June 2023 Board meetings.

Consultative Process

Identifying stakeholders, engaging them in the most appropriate way and using their feedback to inform development of the strategic plan are essential steps to the success of the development and consultative process.

DDSB is committed to seeking input and feedback throughout the process from the following working draft of groups:

- Students
- Staff
- Parents/guardians/caregivers
- Partners (includes unions, federations, associations)
- Community
- Others as deemed appropriate throughout the process

Using a variety of methodologies to ensure every member of the DDSB community who wishes to provide input has the opportunity to do so, including but not limited to:

- One on one conversations
- Surveys and other electronic feedback
- Small group settings
- Large group settings
- Others as deemed appropriate throughout the process

A detailed consultation strategy will be included in the next update report.

Extension of Current Ignite Learning Strategic Plan

In November 2020 the Board of Trustees approved a two-year extension of the current Ignite Learning Strategic Plan through to June 2023. With an anticipated completion date of November 2023 for development of the new Strategic Plan, staff are seeking Board approval to extend the

Ignite Learning Strategic Plan to December 2023. This will allow sufficient time for extensive consultation throughout the strategic planning process.

5.0 Financial Implications

A budget of \$95,000 has been allocated and is estimated to include all costs associated with facilitation of consultations and the creation of the new strategic plan.

6.0 Evidence of impact

The development of a multi-year strategic plan is a fundamental statutory obligation established under the Education Act.

Once adopted, in the past, staff provide reports to the Board of Trustees for information at three points in time throughout each school year related to the operational side of the multi-year strategic plan:

1. Fall Report, Annual Operational Plan – outlines key initiatives that form the focus of work across the District for School Operations and Corporate Services staff).
2. Update Report, Annual Operational Plan – provides a status update on work related to key initiatives.
3. Year End Report, Annual Operational Plan – a detailed progress update including outcomes and data from each key initiative.

A new monitoring methodology and reporting schedule may be developed as part of the multi-year strategic plan implementation.

7.0 Communication Plan

In consultation with the Board and consultant, a communications and marketing plan will be created in parallel with the new multi-year strategic plan and will include extensive promotion across the DDSB website, social media platforms and internal and public meetings to ensure the DDSB community is aware of the vision, priorities and plans for the years to be covered by the strategic plan.

DDSB community members and partners will be informed of opportunities to become involved in the strategic planning process during consultation and feedback sessions through schools, the DDSB website, email and social media.

8.0 Conclusion and/or Recommendations

That the Board of Trustees extend the current Ignite Learning strategic plan through to December 31, 2023 to allow sufficient time for the consultation and development process of the new multi-year strategic plan.

9.0 Appendices

Appendix A: Module 6 of the Ontario Education Services Corporation's (OESC) Professional Development Program for School Board Trustees

Report reviewed and submitted by:

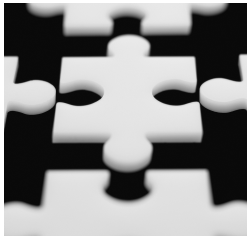


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6 The Strategic Role and Multi-Year Strategic Planning



ONTARIO EDUCATION SERVICES CORPORATION

Revised for 2017

Professional Development Program for School Board Trustees

Core Modules

A note about this Module

In 2017, Ontario's Ministry of Education released its new strategic planning guide, [Multi-Year Strategic Planning: A Guide for School Board Trustees](#). The Ministry's guide was created with the advice and input of many Ontario school board trustees and directors of education. The guide offers comprehensive information on the process of developing and monitoring multi-year strategic plans.

This Professional Development Module, Module #6 - The Strategic Role and Multi-Year Strategic Planning supports and enhances the Ministry of Education's new guide. Consider Module #6 as a pocket guide to multi-year strategic planning – it offers trustees a primer on the subject and provides a consolidated overview of the planning process. This module also introduces additional supports for school boards such as resource videos focusing on key areas of multi-year strategic planning and an online portal where school boards can view and share documents related to their plans.

In this module, you will explore:

- The importance of setting a strategic direction and developing a multi-year strategic plan
- How the governance role of the elected board is linked to the multi-year strategic plan
- The requirements of a strong multi-year strategic plan
- The four phases in the development of the multi-year strategic plan

All too often, school board members are like firefighters on the ground, battling the flames when they should be in a helicopter above the fire, able to see how extensive the blaze is, which way the wind is blowing and where the resources need to be deployed. –Anonymous

Introduction to Strategic Planning

The role of the board of trustees is not that of firefighter, but like that of helicopter pilot – to see the bigger picture, survey the environment, determine where resources are most needed, monitor progress, and adapt to meet changing needs and challenges. Engaging in strategic planning can often prevent “fires” and allows the board of trustees to proactively respond to external forces in the environment. Having a strategic plan in place creates the context for purposeful and meaningful work, helps reduce day-to-day obstacles, and allows trustees to direct their time and energy in support of student achievement and well-being.¹

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Introduction to Strategic Planning (continued)

Generally speaking, strategic planning is an organizational activity that is used to:

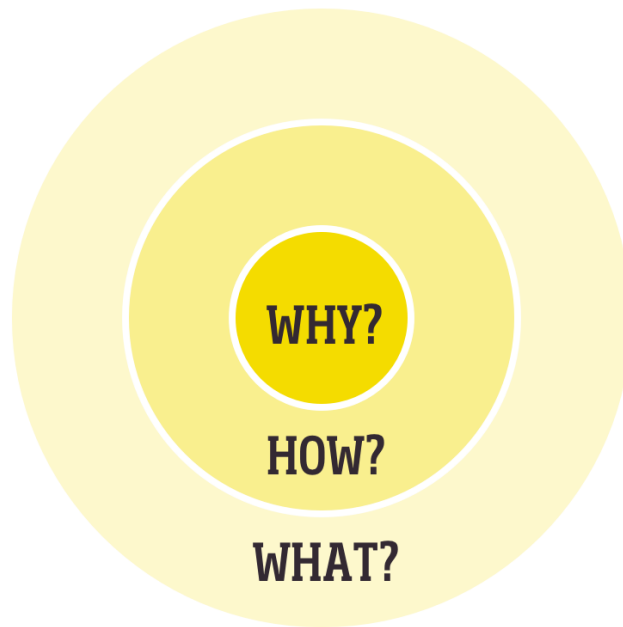
- set priorities
- ensure equity of access and in outcomes
- focus energy and resources
- strengthen operations
- ensure that employees and other stakeholders are working toward common goals
- establish agreement around intended outcomes and processes for monitoring results
- assess and adjust the organization's direction in response to a changing environment

Strategic planning takes disciplined effort, but it produces fundamental decisions and actions that shape and guide what an organization is, who it serves, what it does, and why it does it – always with a focus on an optimal future. In the case of school boards, that means equitable opportunities for all students, staff and families with a focus on student achievement and well-being. Effective strategic planning articulates not only where an organization is going and the actions needed to make progress, but also how it will assess its success.

An organization's strategic plan is the master of other plans – it provides an overall strategic direction to the organization. It also gives guidance for success in specific areas such as financial strategy, media and communications strategy, human rights compliance, organizational development strategy, and human resources strategy. These other strategies, some of which are confused with strategic planning, are intended for specific parts, functions or processes within the organization. All of these other types of planning should be guided and informed by an organization's strategic plan.

Engaging in strategic conversations is a developing role for many boards of trustees. To begin, school boards need to be able to clearly articulate why they exist and who they serve, and these questions need to frame all strategic decisions. Simon Sinek (2009, *Start with Why*) suggests that the most successful organizations use the “golden circle” model presented below in their planning. The inner and most important circle is “Why?” – this is the vision and mission of the board and the inspiration and purpose for its work. The second circle is “How?” and the third is “What?” Trustees can focus on the “Why?” and the “What?” while depending on their director of education to manage the “How?” – implementing the operational, day-to-day aspects of the board's work. As Sinek puts it, “The Golden Circle provides compelling evidence of how much more we can achieve if we remind ourselves to start everything we do by first asking why.”²

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Strategic Planning & Good Governance

Strategic planning is one of the most significant leadership roles of a board of trustees. Strategic planning begins with establishing a purpose and asking the question “Why?” and continues with understanding the bigger picture, determining the board’s goals and strategies, ensuring equity in every aspect of the board’s business, setting relevant and inclusive policy, ensuring effective stewardship of the board’s resources, and monitoring progress towards the realization of the board’s mission and vision. Strategic planning is fundamental to good governance. It supports accountability, transparency and public confidence in school boards. Most importantly, developing a strong plan and seeing it through will have a direct impact on student achievement and well-being for every student in the board.

Why is strategic planning important?

- to bring everyone on board – to engage and to mobilize towards the vision, the “Why?”
- to motivate staff and to acknowledge the value of their work
- to be proactive rather than reactive to external forces of the environment
- to ensure human rights compliance and equity for all students and staff
- to guide decision making at all levels
- to ensure sustainability
- to be accountable to the key stakeholders and to the community
- to improve organizational learning and capacity
- to communicate and engage with the board’s diverse communities on what is important
- to move from board compliance to overall performance
- to fulfil a school board’s obligations under the Education Act ³, the [Ontario Human Rights Code](#) and other relevant legislation
- to provide a framework for allocating resources

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A School Board's Multi-Year Strategic Plan (MYSP)

Establishing and monitoring the implementation of a multi-year strategic plan (MYSP), with a budget that supports it, is a very important legislated responsibility of the board of trustees. Each Ontario school board is required under the Education Act to create a multi-year plan that spans a minimum of three years. The purpose of the plan is to assist school boards in setting long-term strategic priorities and goals. Once the MYSP is developed, all other short-term planning can then be aligned with the MYSP and support progress towards the plan's long-term vision.

The MYSP and its accompanying implementation and operations plans must address:

- Equity, student achievement and well-being
- Ensuring a safe and inclusive school environment and promoting anti-bullying initiatives
- Effective stewardship of the board's resources
- The delivery of effective and appropriate educational programs

More specifically, a MYSP includes:

- A shared vision and mission
- Clear values and beliefs that will drive actions
- A small number of strategic priorities that will drive the organization
- Results or outcomes congruent with these priorities
- Respect for human rights and equity for staff and students
- Accountabilities and performance measures for tracking progress in equity of outcomes for students and staff
- Alignment of resources – a balance between strategies and budget
- Key success indicators
- Strategy for monitoring progress
- A framework for leadership and accountability
- Alignment of policy with strategic directions
- An effective communication strategy
- Provision for continuous capacity building throughout the school board in order to obtain end results

A board's MYSP is its "face" to the community. It informs constituents of what the board intends to achieve, what its priorities are and how it plans to achieve them. It reflects the vision for the board including its overall purpose (mission statement), beliefs, and strategic directions. The local practices, traditions and cultures of boards will inform its goal-setting process.

While final decisions relating to the MYSP are the responsibility of the board of trustees, the plan is developed through a partnership involving the board of trustees, the director of education (and staff), students, and the community. It may take several months to develop and should be the result of consultation with all of the board's stakeholders - especially those who are marginalized, under-represented, or under-served. The public should have access to the board's MYSP. To promote community

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A School Board's Multi-Year Strategic Plan (continued)

engagement and enhance accountability, many boards also provide a more “user-friendly” summarized version of the MYSP on the board website, as well as the full plan with accompanying implementation and operations plans. A strong MYSP will shine the spotlight on a board's ability to govern and its commitment to its children and students.

What makes a strong MYSP?

A strong MYSP requires careful and detailed planning at every step of the process. A well-designed MYSP will create meaningful impact by reflecting what a board has learned and experienced in the past. It will move a board into the future and will be innovative, inclusive, and courageous by design – pointing the way forward and providing a framework to get there and for measuring progress against goals. The plan should engage the board's diverse communities, promote collaboration among stakeholders, and help integrate different points of view. A board's MYSP should be hopeful and address new realities such as changing communities, new technologies, and expanding parental and community expectations.

The Multi-Year Strategic Plan: A collaborative process

With a solid understanding of the concept of strategic planning and what is required of their school boards, trustees can confidently begin the strategic planning process. The requirement to create a MYSP is a legislated responsibility and boards have recognized for a long time that this is an important governance practice. The approach to multi-year strategic planning that follows is designed to assist boards as they develop their plans.

The following section summarizes the planning process and breaks it down into four phases:

1. Getting Organized
2. Gathering Information: Collecting Data & Engaging Key Stakeholders
3. Setting Strategic Direction: Developing the MYSP
4. Implementing the MYSP & Monitoring Progress

While the first three phases may take only a few months to complete, the final phase (implementing & monitoring the plan) will last between three to five years. Boards should be mindful that all phases of the strategic planning process should be framed by an overarching commitment to student achievement and well-being, equity, and the diverse needs of the board's communities.



The following graphic helps illustrate the phases involved in the MYSP process:

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The Multi-Year Strategic Planning Process



Phase 1. Getting Organized

Developing a strong MYSP begins with taking the time to get organized. A good place to start is reviewing the planning process from the previous MYSP and establishing what worked, areas for improvement, and what approach will be taken this time around. A commitment to good record keeping now will help to inform the next cycle of planning too.

This is also a good time for boards to take inventory of their collective strategic planning abilities, review the board's capacity to use their own staff and resources for strategic thinking and strategic planning, and design a process to include voices that were missing last time around. Some boards may discover that they could benefit from the help and perspective of an external consultant – a third party advisor who can assist the board with specific aspects of their plan or the entire process. Boards who have seen a large turnover in trustees or a change in their goals may find particular benefits in seeking the support of an outside facilitator to enhance the board's skills in strategic planning.

Strategic Planning Committees

When getting organized, the director and the board will also have to decide how they want to assign responsibility for guiding the MYSP process. Larger school boards usually establish strategic planning committees, while smaller boards may need all trustees on the strategic planning committee and work closely with senior staff in the plan's development. No matter the size of the board, committee members should include those with the greatest responsibility for carrying out the plan (e.g. the board chair, director, senior staff) and First Nation trustees and student trustees who can lend crucial voices to the plan's development. The committee should be sure to establish clear roles and responsibilities for its members from the outset and timelines for each stage of the plan's development.

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Mission, Vision and Values

Another crucial step to this initial phase of getting organized is conducting a review of the board's mission, vision and value statements. The mission statement is a statement of the board's "Why?" - the inspiration and purpose for its work. A vision statement will provide a vivid description of long-term success that answers the question, "if our board succeeds at its highest most equitable level – what would that look like?" Boards can ask themselves "What do we want for our students who are thriving? What do we want for those who are struggling? What do we want for our students when they leave school?" The board should also review its values statement – it outlines the board's shared values and beliefs.

All of these statements help the board make fundamental choices that will shape the board's future, drive action, and inform all aspects of the MYSP. When conducting the review, boards will need to ensure that the statements remain reflective of their beliefs and needs. A board's mission and values statements will likely remain stable over time. Establishing a renewed vision statement is critical to the MYSP process – the renewed vision should address equity, achievement and well-being in the ever-changing context of students, staff, and communities in Ontario.



Phase 2. Gathering Information: Collecting Data & Engaging Key Stakeholders

The second phase in the development of a successful MYSP begins with research. It's critical to establish a clear understanding of what is happening in the board. The strategic planning committee can accomplish this by gathering current and relevant information through an environmental scan and making recommendations based on the best available data they uncover. Engaging with key stakeholders (such as board staff, students, families, and community groups) is also essential to getting a clear snapshot of the state of the board and is a necessary step before setting the strategic direction for the MYSP. Particular attention should be paid to collecting the kind of data that may highlight systemic issues in the board specifically related to equity.

If you don't use data, you're making decisions in a fog.
–Shere Calouri, school board chair, Beaverton School District, Ore.

Scanning the Environment & Analyzing the Data

An environmental scan calls on the committee to gather and analyze information and data pertaining to the board's internal and external environments. The committee will work together to identify emerging issues, trends and challenges, and to recommend the areas where the school board needs to shift, change or improve.

To perform the environmental scan, the board can engage in a process of reflection, learning and open dialogue by using different approaches such as a SWOT analysis to identify Strengths, Weaknesses (pertains to the internal environment), Opportunities and Threats (pertains to the external environment). An alternative and very effective approach to SWOT is the Appreciative Inquiry method.⁴

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The core message of this approach is to lead an organization from a position of positive aspects and strengths and not from negativity and problems. With Appreciative Inquiry, the committee can look at what a board is doing well and take a strengths-based approach to planning.

In conducting the environmental scan, the committee must take into account a broad range of internal and external information and data such as:

Internal Environment

- The impact of the previous MYSP
- Academic achievement rates
- Student and staff well-being
- Parent engagement
- School climates
- Status of buildings and infrastructure
- Enrolment trends
- Human resources capacity
- Trends in rotation and retention of staff
- Results from provincial assessments
- Results of surveys to students, families, constituents and staff

The committee should gather demographic data and cross-reference that data with the information collected on the above areas. This analysis should uncover systemic issues and surface equity issues in the board. This process will allow the board to work toward full human rights compliance and ensure that equity is at the core of the educational services the board provides. The committee should both identify areas for improvement and confirm what is working well – globally and for marginalized groups – and set tentative strategic priorities accordingly.

External Environment

- Socio-economic and demographic characteristics
- Immigration patterns
- Changes in the political environment
- New provincial directives and legislative changes
- New collective agreements
- Economic and market trends
- Technological trends
- New approaches or changes in pedagogy

The committee must then interpret their data in the context of the schools, of the school board, and of the entire education system in order to understand how the information impacts on the multi-year strategic planning process. The committee will likely see common themes emerging that will begin to suggest a direction for the board. Attention should also be paid to any information that falls outside of the main themes that have emerged – this outlying information may be significant, particularly if it relates to issues of equity.

While analyzing the data, the committee will find through their collaborative process that areas of strategic priority begin to emerge. These priorities should highlight the general results the board would like to achieve. And while they will likely shift as the MYSP process moves forward, working with a set of priority areas will help drive the formal stakeholder engagement and planning processes to come.

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Stakeholder Engagement

Stakeholder engagement is an essential component in developing the MYSP. This is a special opportunity for the board to engage its stakeholders as valid, essential and interdependent members of a larger network. Unlike the process of community engagement (which is two-way communication that should be happening on a regular basis no matter what the board of trustees is working on) stakeholder engagement is a formal part of the MYSP process. It can be broken down into four steps:

1. Identify your board's stakeholders. Stakeholders will include students, board staff, families, and members of the community. An inclusive list encompasses the voices of Indigenous peoples, newcomers to Ontario, the LGBTQ community, the racialized community, organizations engaged with families of low socio-economic status, community groups engaged with special education needs, and other community groups speaking on behalf of underserved children. Staff and student members from these communities can help identify these groups and support trustees to develop ongoing relationships.

2. Decide on the right approach to engagement. The committee should be mindful of the many diverse communities of the board and be sure to offer their preferred method for engagement. Stakeholders should be invited to create the engagement process itself – not just respond to it.

This could include community forums, town halls, online surveys, collaboration software, teleconferences, interviews or focus groups. Committees should consider using existing meetings and getting the MYSP on meeting agendas. In approaching the engagement, the committee can ask itself this question: “What method(s) will work best to obtain multiple perspectives from all stakeholders to identify common critical issues, needs, expectations and possibilities?”

Questions should be brief, unambiguous and meaningful to the stakeholders. They should be based on the potential strategic priority areas identified through the data analysis stage; this will assure stakeholders that the committee has prepared well and has a sound context for the discussions.

3. Conduct the Engagements. Actively engage stakeholders to share their views, concerns, ideas and questions on areas of strategic priority. This process may be led by the committee, a third-party facilitator or stakeholders themselves. Be sure to reflect back to stakeholders what the committee has heard so that all feedback is captured accurately in the record of the stakeholder sessions.

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4. Analyze the findings. Turn stakeholder thinking into evidence-based action by sifting through the feedback to find the common themes that can then shape the board's direction. Pay particular attention to the way some groups experience and interact with the board compared to others. If there are significant differences between demographic groups that can be seen, it likely flags real equity and human rights issues in the board that need to be addressed. Again be sure to look for the outlying points of view that may be unpopular but bring important information to light. The difference between the two can inform issues that need to be addressed. This step also includes comparing stakeholder feedback with the data the committee has gathered on its own. The findings should be similar – if they are not there may be a need for more research. Based on stakeholder feedback, this is also the time to review and refine the strategic priorities identified earlier.



Phase 3. Setting Strategic Direction: Developing the MYSP

The committee is now equipped with relevant, accurate and useful information and is well-positioned to finalize strategic priorities and goals. Together, with the board of trustees and senior staff, the committee will solidify the school board's strategic direction and decide on the steps to take in realizing the board's vision for the future.

Length of the MYSP

A key consideration now will be deciding on the duration of the MYSP. A plan typically lays out the direction for the board for a minimum of three years (as required by the Education Act) up to a maximum of five. Four years, however, can be considered as an ideal MYSP length as this provides enough time to achieve improvements over the short and long-term. A four-year plan also correlates with the trustee election cycle; offsetting the implementation of the MYSP by one year or two years before an election allows new trustees to come into a board with a plan firmly in place and also allows them to participate in the creation of a MYSP later during their term.

Setting Strategic Priorities and Corresponding Goals

The committee's next step is to affirm areas of strategic priority. An initial list has been developed during the earlier phases of planning – now it is time to finalize three to five major priorities for the school board. The selected strategic priorities should reflect the research, stakeholder engagements and analysis done to date; they should be representative of the needs of all stakeholders, seek to strengthen the achievement and well-being of every student, and enhance public confidence in the board. The goals should have equity at the fore. They should be ambitious, motivational, and be powerful enough to pave the way forward for the board.

The committee can now build goals around each area of strategic priority. These goals are the things the board plans to achieve over the course of its strategic plan. Goals will flow from the mission and vision

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and address each area of strategic priority. It's advisable to attach at least one clearly defined and measurable goal to each strategic priority. Goals focus on results and goals should be SMART: Specific, Measurable, Achievable, Realistic and Time-based.



Developing an Evaluation Framework

Evaluation frameworks are tools to answer the question, “How will we know if we’re succeeding?” Evaluation frameworks establish accountabilities, name performance measures, and identify the desired outcomes. They make evaluation easier and help turn high-level priorities into measurable goals. When done well, evaluation frameworks place equity at the forefront of the board’s success. The committee is tasked with developing a high-level evaluation framework to outline what needs to be done and how this will be measured. One tool for doing this is the logic model.

Logic models are ideal frameworks to use when laying out a MYSP. The template provided below would work well for a school board’s MYSP. It presents each strategic priority with its corresponding goals and sets out how the committee will:

- Establish outcome statements for each goal. These statements describe the goal’s desired impact – they are specific descriptions of what success would look like. Equity should be evident in the crafting of outcome statements. It is helpful to identify a short-term outcome for each goal (as a direct result of the MYSP) and intermediate outcomes where evidence of change in behaviours, practices, decision-making, policies and social action will become evident.
- Assign targets to each goal. These are key success indicators in the form of specific quantitative and qualitative data to indicate the progression or level of success in achieving a goal. Targets should be measurable and achievable within a set period of time. At the outset, every outcome statement should specify methods of assessment and data collection tools. Many quantitative measures already exist and others can be created as needed. These measures will track how progress is being made.
- Define the monitoring and reporting structure for each goal. The board is accountable to the public for the results achieved in the MYSP. How often will students, staff, families, community groups, and the larger community want to be updated on progress towards goals? The MYSP will also include a schedule for the director to report on progress for each strategic goal to demonstrate accountability for results achieved in the MYSP. The schedule would consider, for example, how to engage the Indigenous Education Advisory Council, the Special Education Advisory Council, the Parent Involvement Committee, the Equity Advisory Committee, and others in monitoring and reporting, and how often the board community will want to hear progress updates.

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Logic Model Template

Strategic Priority 1	Goal 1	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures
	Goal 2	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures
	Goal 3	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures
Strategic Priority 2	Goal 1	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures
	Goal 2	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures
	Goal 3	Short-term Outcome(s)	Intermediate Outcome(s)	Target	Reporting Structures

Creating Logic Models may seem complex, but they can be relatively straightforward and highly useful tools. For excellent resources on evaluation frameworks and understanding logic models, please visit: [this guide](#).



Writing the MYSP

With the evaluation framework complete, the board can now draft the actual MYSP document and transform the logic model into a more relatable and engaging plan for the board and stakeholders. The MYSP document should feature the board's mission, vision and value statements, explain how the plan came to be, the research and stakeholder engagements that guided the selection of strategic priorities, and a refined presentation of the logic model itself. The final document should be ambitious, relatable and inspiring. It should be inclusive of diverse points of view and showcase the board's commitment to its students, staff and community, and point a positive way forward for all. Everyone should see themselves reflected in the MYSP.

When the final MYSP document has been drafted and before it is brought to the board for approval, the committee should provide it to the board of trustees for review. This review can lead to revisions that will improve the plan and ensure that the views of all stakeholders are well reflected. Following this review, it can be formally presented to the board for final approval, which is the final step in the creation of the MYSP.

The committee should also establish an effective communications strategy to promote the MYSP upon its launch, making it available to board staff, students, families, community organizations, and other stakeholders.

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The communications plan should include specific outreach to the board's marginalized communities. A summary on the board's website with a link to the full version of the MYSP is a first step in promoting the plan. It can also be shared through in-person presentations, printed summaries, news releases and electronic notices. The MYSP should be referenced regularly in board communications.

Online Strategy Portal

School boards are invited to peruse and upload documents associated with the multi-year strategic planning process on OESC's Online Strategy Portal. Documents will include multi-year strategic plans, board reports, annual reports, director appraisal templates/policies and evaluation frameworks. This is an excellent resource to share effective practices and collaborate on the the planning process. To view the Online Strategy Portal, please visit: [the OESC online strategy portal for board generated content](#).

4. Implementing the MYSP & Monitoring Progress

The MYSP is complete and now it's time to implement the plan and see it through. Both the board of trustees and the director of education have specific duties in implementing the MYSP and monitoring its progress.

Overview of Director's Responsibilities

Under the Education Act, the director is responsible for the implementation of the MYSP. The director, with senior staff, will transform the MYSP into concrete action plans for which they will own responsibility. More specifically, the director will:

- **Work with senior staff to build upon the existing logic model.** Each strategic goal identified in the MYSP will now require its own detailed logic model. Building this out will help with implementation and monitoring of each goal. Tip: To see the Ministry of Education's resources for creating detailed logic models visit [this guide](#).
- **Align the MYSP with board operational and improvement plans and school-level plans.** Working with the completed logic models, these plans will outline how to achieve the MYSP's priorities and goals and work to bring the MYSP to life. The director must pay careful attention to ensure that data collection tools from the logic models are woven into these plans. This will allow the director to track the success of each initiative.
- **Develop the annual board budget to support the MYSP.** The budget process involves multiple consultations between the board and senior staff. With the assistance of the finance committee, the director presents to the Board for approval a proposed board budget which is a financial reflection of the strategic priority areas and goals set out in the MYSP.

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- **Monitor the progress of the MYSP** by analyzing data collected, assessing the impact of each initiative, and adjusting implementation actions and resources to support these initiatives as required. This is when it is most important to track progress toward achieving academic excellence, equity of outcomes, and well-being of students and staff. If expected progress is not being made, the director and senior staff can make adjustments to ensure that the MYSP goals get back on track.
- **Report regularly to the board on the progress of the MYSP;** this allows trustees to keep their constituents up to date on achievements and setbacks. The director is required to review the plan annually with the board.

Overview of Board's Responsibilities

With the approval of the MYSP the board has provided its director and staff with a set of strategic priorities and goals to guide the work of the board. The board of trustees can then concentrate on progress and outcomes. The board should expect progress reports from the director and senior staff, seek cogent explanations about results, and insist on clear next steps in relation to the results being obtained. The board of trustees is responsible for:

- Approving the annual board budget
- Being accountable to key stakeholders and to the public for the results achieved and setbacks encountered in the implementation of the MYSP
- Developing a communications strategy to promote the MYSP, sharing it with the community, and reporting on achievements and progress regularly
- Monitoring the progress of the MYSP towards the achievement of strategic goals by referring back to the initial MYSP logic module
- Reviewing the MYSP annually with the director to measure success and maintain focus on the board's strategic direction
- Reviewing the director's performance based on the progress made toward realizing the MYSP's goals



Conclusion

A strong and well-implemented MYSP has the power to shape an optimal future for students and staff, and can have a positive and meaningful impact on the board's diverse communities. Trustees are leaders

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of publicly funded education and leaders in their communities and in the province. Together, they are responsible for creating the winning conditions within their school boards and beyond that enable every student to meet high standards of achievement, that foster cultures of well-being and inclusion, and that ensure equitable and healthy school environments. Setting a strategic direction is essential to this commitment and to the governance role of the elected board.

Ministry Resources

The Ministry of Education has created a new guide for school board trustees on multi-year strategic planning. The guide is designed to support boards of trustees in the process of developing and monitoring their MYSPs. The guide, and its accompanying resources, are very thorough and build on the work school boards have done to date. Excellent guidance and resources for areas such as data collection, evaluation frameworks, stakeholder engagement, and communications planning are [available here](#).

Board Professional learning Sessions

Skilled facilitators are available to assist boards in the development and review of their Multi-Year Strategic Plans. English and French speaking facilitators can offer professional learning around:

- Strategic Thinking
- Developing and Reviewing Mission, Vision and Value Statements
- Data Collection and Analysis
- Stakeholder Engagement
- Setting Strategic Priorities and Goals
- Evaluation and Monitoring Progress (including evaluation frameworks and logic models)
- Living the MYSP: Alignment & Implementation (including annual plans, communication strategy and director's performance appraisal)

For more information or to book a facilitated session for your board, please visit/contact the [OESC web site](#).

Notes

1. MacBeth, Theresa. "From scorecards to storyboards." Presentation, Public Education Symposium, Toronto, January, 2017
2. *Start with Why*, Simon Sinek, 2009, page 38
3. *Education Act*, s. 169.1(1)
4. *Appreciative Inquiry: A Positive Revolution in Change*, Cooperrider, David L. and Diana Whitney and <http://appreciativeinquiry.case.edu/>

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The Education Act, Section 169.1

Board responsibility for student achievement and effective stewardship of resources

169.1 (1) Every board shall,

- (a) promote student achievement and well-being;
 - (a.1) promote a positive school climate that is inclusive and accepting of all pupils, including pupils of any race, ancestry, place of origin, colour, ethnic origin, citizenship, creed, sex, sexual orientation, gender identity, gender expression, age, marital status, family status or disability;
 - (a.2) promote the prevention of bullying;
- (b) ensure effective stewardship of the board's resources;
- (c) deliver effective and appropriate education programs to its pupils;
- (d) develop and maintain policies and organizational structures that,
 - (i) promote the goals referred to in clauses (a) to (c), and
 - (ii) encourage pupils to pursue their educational goals;
- (e) monitor and evaluate the effectiveness of policies developed by the board under clause (d) in achieving the board's goals and the efficiency of the implementation of those policies;
- (f) develop a multi-year plan aimed at achieving the goals referred to in clauses (a) to (c);
- (g) annually review the plan referred to in clause (f) with the board's director of education or the supervisory officer acting as the board's director of education; and
- (h) monitor and evaluate the performance of the board's director of education, or the supervisory officer acting as the board's director of education, in meeting,
 - (i) his or her duties under this Act or any policy, guideline or regulation made under this Act, including duties under the plan referred to in clause (f), and
 - (ii) any other duties assigned by the board. 2009, c. 25, s. 15; 2012, c. 5, s. 3 (1).

Multi-year plan

(2) A multi-year plan is a plan for three or more school years. 2009, c. 25, s. 15.

School climate surveys

(2.1) In fulfilling its duties under clause (1) (e) with respect to the effectiveness of policies developed by the board to promote the goals referred to in clauses (1) (a.1) and (a.2), every board shall use surveys to collect information from its pupils and staff, and parents and guardians of its pupils at least once every two years in accordance with any policies and guidelines made under paragraph 31 of subsection 8 (1). 2012, c. 5, s. 3 (2).

Same

(2.2) In collecting information under subsection (2.1), a board shall not collect any name or any identifying number, symbol or other particular assigned to a person. 2012, c. 5, s. 3 (2).

Measures in plan

(3) Every board shall ensure that the plan referred to in clause (1) (f) includes measures respecting the allocation of resources to improve student outcomes that fall below the outcomes specified in regulations made under section 11.1. 2009, c. 25, s. 15.

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The Education Act, Section 169.1

Communications

(4) Every board shall take steps to,

(a) bring the plan referred to in clause (1) (f) to the attention of supporters and employees of the board;
and

(b) report to supporters and employees of the board about progress in implementing the plan referred to in clause (1) (f). 2009, c. 25, s. 15.

Effective stewardship

(5) Every board shall,

(a) effectively use the resources entrusted to it;

(b) use the resources entrusted to it for the purposes of delivering effective and appropriate education;
and

(c) manage the resources entrusted to it in a manner that upholds public confidence. 2009, c. 25, s. 15