MULTI-YEAR STRATEGIC PLANNING

A Guide for School Board Trustees

2017

This document has benefited from feedback and input from a variety of organizations and individuals, both inside and outside the education sector. The Ministry of Education is grateful to the Multi-Year Planning Resource Guide Advisory Committee, to Ontario's school board associations, to the Council of Ontario Directors of Education, and to the many trustees, directors of education, and senior administrators who provided their advice and significant contributions to the materials in this guide.

Contents

Seeing Our Students

Our students come to us with a lifetime of different experiences, beliefs, hurts, hopes, fears, questions, and dreams. Some come with many successes. Some with many disappointments. We must see our students with all their talents, skills, differences, and potential.

Our students come to us with different connections to this land and place. Some of our students have ancestral ties to this land, and their Indigenous histories and ways of knowing have been disrupted and harmed in the creation of our country. Some of our students are the descendants of those who came here generations ago. Some came by choice as immigrants, some came as part of a slave trade, some came desperate for economic opportunity, some came as refugees. Some of our students are recent immigrants who are just beginning to call Ontario home.

Our students come to us speaking many different languages. Some of our students are children of French-language rights holders in our predominantly English-speaking province. Some speak in sign language. Some speak languages they do not hear at school or on television.

Our students are differently abled. Some come ready to learn independently. Some need greater levels of support to reach their potential. All need support from their teachers, families, and friends.

Our students have various affiliations with religion and religious practices. Some see their religion celebrated in the public sphere. Some experience prejudice because of their religion. Some do not follow a religion.

Our students come from families of different configurations. Some have parents who are accepted in our society. Some see their guardians questioned about their parenting roles. Some have stable families. Some have families that are struggling. Some students live in hospitals, foster homes, shelters, and group homes. Some students live in houses and apartments. Some live alone.

Our students have diverse gender identities and sexual orientations. Some of our students are racialized. Some experience closed doors and closed hearts because of

the colour of their skin, or the way they dress, or how they look. Some fit in easily to society's norms. Others struggle to find their place. Some experience bullying. Some act as bullies.

Our students are children, adolescents, and adults. They bring with them different experiences with scarcity and plenty, safety and violence, poverty and privilege, acceptance and discrimination, opportunity and rejection. Our students are reflections of their histories and experiences, as well as of their future potential and hope in the world. Some arrive ready to succeed. For others, the success is in arriving at all.

They all arrive on our doorstep.

Introduction

Every school board[1] in Ontario is governed by a board of trustees that has a legislated requirement to ensure the creation of a multi-year strategic plan (MYSP).[2] The MYSP is a visioning and policy document that sets the direction for the board. It is fundamental to ensuring good governance and to building public trust in boards of trustees not only to safeguard our schools, but also to ensure that they are caring, equitable, innovative, and flexible. While our schools make every effort to offer stability, they also strive to meet the changing needs and realities of our society. The operational and improvement plans created by the director of education[3] and senior administrators are based on the MYSP and map out how the MYSP will be implemented.

Creating a strong MYSP requires careful planning at every step in the process. **A thoughtful and robust plan reflects what has been learned from the past, not what has been done in the past.** It provides a solid framework for shared ownership and meaningful impact.

To help ensure the success and well-being of *every* child and student, boards of trustees should strive to create MYSPs that are courageous, hopeful, and resilient. A strong MYSP is a driver for positive change in the board. When developing their plans, they should be relentless in their efforts to address the needs of all students and changing communities. There are many realities to consider. Technology is affecting us all in significant and ever-changing ways. Parental expectations are growing broader and deeper. Provincial priorities for education are continuing to expand beyond academics. Our understanding of equity is becoming increasingly sophisticated, yet inequity of outcomes for students persists. Our demographics are

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1. The terms *school board* and *board* are used in this document to refer to district school boards and school authorities.
2. The Education Act requires that "every board shall develop a multi-year plan". In practice, a multi-year plan is a strategic plan. In this document, the term *multi-year strategic plan* (MYSP) is used to encompass both the legislated requirement and the strategic nature of multi-year planning.
3. In this document, *director* is used to refer to the director of education.

shifting due to immigration in some communities and population decline in others. These realities require that boards of trustees show leadership and drive, and that they collaborate closely with families, staff, and community members. The strategic planning process is the primary opportunity for boards to put leadership and collaboration into action.

A strong MYSP not only points the way forward, it provides a framework for how to get there by:

- detailing the allocation of the board's resources among its strategic priorities;
- functioning as a guide for the board of trustees and senior administrators when they are making difficult choices;
- illustrating to stakeholders how decisions are made;
- focusing the board's attention when it is dealing with unexpected challenges, and thus preventing reactive or short-sighted decision making;
- creating a shared vision for diverse internal and external stakeholders;
- motivating the board's staff and giving employees at every level of the organization a sense of purpose.

An effective MYSP will also:

- help boards to reach the renewed provincial goals for education outlined in *Achieving Excellence: A Renewed Vision for Education in Ontario* (2014);
- support the Ontario government's commitment to building a highly skilled workforce;
- help create coherence and cohesion for Ontario's publicly funded education system;
- encourage collaborative professionalism and a collective growth mindset[4] among educational stakeholders;
- engage communities in ongoing conversations about education;
- stand as a beacon for boards as they focus on creating a measurably better future for all children, students, and staff;
- not only protect, but promote human rights and ensure equity in achievement and well-being.

The Ministry of Education policy on collaborative professionalism, outlined in Policy/Program Memorandum No. 159, "Collaborative Professionalism" (2016), reflects the commitment of all education partners to work together on creating

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4. A growth mindset refers to the belief that people can acquire any given ability, provided they invest effort or study. Research shows that individuals and groups are more likely to be successful if they have a growth mindset rather than a fixed mindset. See Carol S. Dweck, *Mindset: The New Psychology of Success* (New York, NY: Random House, 2006).

the necessary conditions of trust and shared thinking required to improve student achievement and student and staff well-being. PPM No. 159 builds on the shared commitments summarized in *Achieving Excellence*.

Communication and engagement with internal and external stakeholders is vital throughout the strategic planning process in order to confirm respect for and inclusion of all voices. Effective communication and community engagement by the board of trustees should include providing regular updates; opening doors for discussion, feedback, and input; and ensuring that the planning process follows the principles of the Ontario government's Equity and Inclusive Education Strategy.[5] Transparency and collaboration will improve the quality of the MYSP and increase the likelihood that it will be wholly adopted by all members of the board community.

▶ About This Guide

This guide is designed to support boards of trustees in the process of developing and monitoring their MYSPs. It builds on the innovative and bold work that school boards have done to date. Ontario has one of the best publicly funded education systems in the world and this is due, in large part, to the **clear and flexible thinking** of boards of trustees across the province who have prioritized the success and well-being of *every* child and student.

To best serve the evolving needs of students, each board of trustees should recognize that even as their existing targets are being realized, new goals must be set. An appreciation that "the work is never done" enables children and students who are underserved or who are not meeting their full potential to experience real and tangible improvement.

The seventy-two district school boards in Ontario include English- and French-language boards, and public and Catholic boards. There are also ten school authorities. This guide strives to meet the needs of all of these boards but cannot address the particular nuances of each individual board. The MYSP is an opportunity for each board to demonstrate its identity and values in ways that drive the board forward.

Although this guide is written primarily for trustees, it will be useful for everyone involved in the strategic planning process. The director of education, who, under the Education Act, is the chief executive officer and the chief education officer of the board,

5. Ontario's Equity and Inclusive Education Strategy provides a framework for the education community to identify and remove discriminatory biases and systemic barriers that may limit access to, and opportunity for, effective student engagement and achievement.

must operationalize the MYSP. This guide identifies both the specific accountabilities of the director and the key moments when the director must support and work collaboratively with the board of trustees to develop the MYSP. Note that, in some cases, the director may delegate responsibilities to senior administrators (e.g., ask them to write reports for the board of trustees on the progress towards achieving the strategic goals or to develop aspects of the board operational plan), but the director remains accountable to the board of trustees for any functions so delegated.

The board chair, the director, and senior administrators play a pivotal role in the development of the MYSP, as do board support staff, parents,[6] students, and community partners. This collaboration ensures that the goals of the MYSP are deeply rooted in the realities of the children, students, families, and communities within the board.

This guide focuses on the four key phases involved in developing and monitoring the strategic plan. Recognizing that boards have different contexts, this guide provides guiding questions and considerations to account for differences in board size, geographic circumstances, and demographic trends. This guide also recognizes that boards of trustees are at different stages in the strategic planning process. While the strategic planning process is essentially the same for all boards of trustees, each one must determine the best way of using this guide. The MYSP process is not always linear and the phases may overlap and inform each other in various ways.

Some sections in this guide include electronic links to supplementary resources that provide more detailed information on aspects of the strategic planning process.

This guide strives to reflect current thinking and best practices in the strategic planning process of school boards. It will be updated periodically in response to emerging trends and changes in the sector.

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6. In this document, *parent(s)* refers to both parent(s) and guardian(s). It may also be taken to include caregivers or close family members who are responsible for raising the child.

Alignment with Effective Practices Outlined in *Strong Districts & Their Leadership*

Strong Districts & Their Leadership (2013) is a paper that was commissioned by the Council of Ontario Directors of Education (CODE) and the Institute for Education Leadership. Written by Kenneth Leithwood, it outlines the characteristics of strong districts and the specific leadership practices necessary to develop these characteristics. The strategic planning process offers many opportunities for boards of trustees to demonstrate these leadership practices and make these characteristics seen, felt, and heard. In this guide, the icon that appears below indicates where the guide's recommended strategic planning process is directly aligned with these characteristics.

As outlined on page 11 of *Strong Districts & Their Leadership*, strong districts have the following nine characteristics:

1. a broadly shared mission, vision, and goals founded on ambitious images of the educated person
2. a coherent instructional guidance system
3. deliberate and consistent use of multiple sources of evidence to inform decisions
4. learning-oriented organizational improvement processes
5. job-embedded professional development for all members
6. budgets, structures, personnel policies and procedures, and uses of time aligned with the district's mission, vision and goals
7. a comprehensive approach to leadership development
8. a policy-oriented board of trustees
9. productive working relationships with staff and other stakeholders
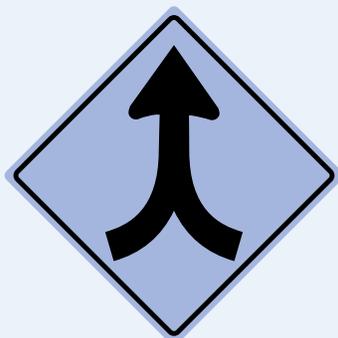
The MYSP Process

Under the Education Act, every school board must create a multi-year plan that spans a minimum of three years. The purpose of the MYSP is to help boards set long-term strategic priorities and goals. The plan must be based on evidence to ensure that it has a clear purpose and that it is effective. Once the MYSP is developed, all other short-term planning should be aligned with it and support progress towards its long-term vision.

It is important that both the board of trustees and the director create and maintain processes for capturing institutional memory of what's been learned in the development of the MYSP. This helps to ensure that the MYSP is understandable to incoming trustees and directors and to inform future strategic planning processes.

It is also important that boards use a collaborative process at every step in the MYSP's development, so that everyone can take ownership of the MYSP and feel responsible for its success.

The MYSP process involves four phases, as illustrated in this graphic.

Community Engagement • Reflection

Equity and Inclusion

Phase 1 Getting Organized

Phase 2 Gathering Information

Phase 3 Developing the MYSP

Phase 4 Implementing and Monitoring the MYSP

Student Achievement and Well-Being
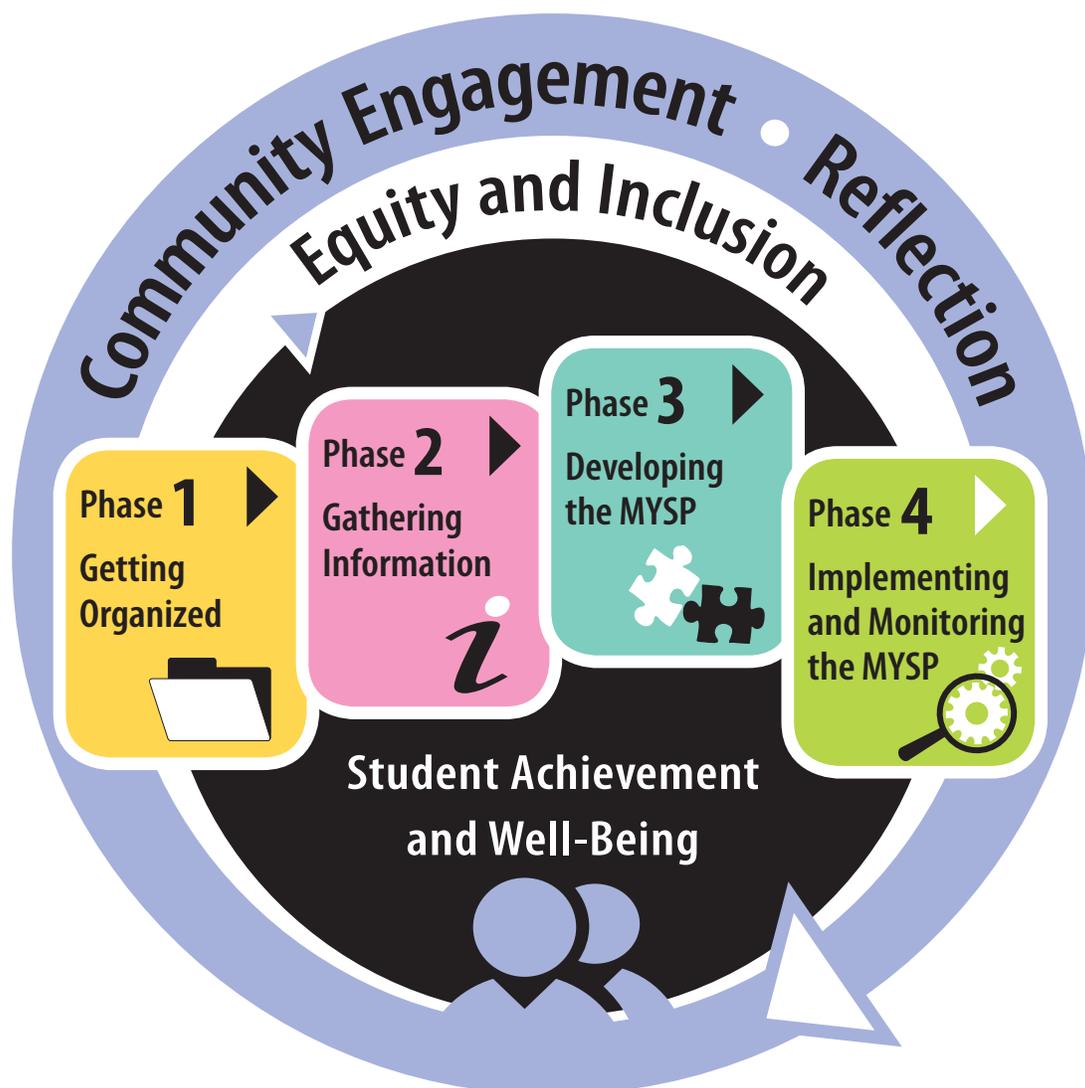
Phases 1, 2, and 3 can each take up to a few months to complete, while Phase 4 can last anywhere from three to five years, the duration of the plan itself. In this graphic, the white arrow in Phase 4 represents the longer time frame. Each phase in the process is discussed in detail in the following pages.

🔗 SUPPLEMENTARY RESOURCE:
Legal Obligations for Multi-Year Strategic Planning

Getting Organized

For the development of the MYSP to be effective and meaningful, it is important to first devote time and attention to getting organized. Reviewing and coordinating the strategic planning process at the outset will ensure that future discussions stay focused on the content of the MYSP, rather than veering off course to procedural questions or next steps. At this stage of the process, a number of questions will need to be addressed, including questions about how the board of trustees can best hone its strategic thinking and planning skills. Discussions about this question and others appear in the following pages.

▶ How Can We Best Build Capacity?

Building capacity in this context means improving both **strategic thinking** and **strategic planning** skills. These are different but connected activities. Strategic thinking is creative thinking that tackles the big issues facing an organization in clever, resourceful, and imaginative ways. Strategic thinking skills take dedicated time to develop. Like a muscle that needs to be used regularly and purposefully to make it strong, strategic thinking requires ongoing practice and refinement. An external facilitator (see the next section) can help the board of trustees to develop skills that strengthen strategic thinking.

> **"** Strategic thinking can be understood as being: (a) conceptual: reflecting ideas, models, and hypotheses, (b) systems-oriented: taking into account the interaction of the organization's parts as well as its relationship with the external environment, (c) directional: providing a sense of an aimed-for future state which is different from the present, and (d) opportunistic: taking advantage of the organization's past achievements and present competitive and environmental conditions.
>
> – Judi Mellon and Michael Kroth, "Experiences That Enable One to Become an Expert Strategic Thinker", *Journal of Adult Education* 42, no. 2 (2013), p. 71

Strategic planning puts big thinking into action. It involves putting the pieces together into one coherent plan that will drive the organization forward. To improve strategic planning skills, the trustees, the director, and senior administrators should review the planning process for the previous MYSP to determine what can be learned from it, and how it can be improved. This can be done through orientation sessions, workshops, and retreats.

At the same time, a workshop to discuss the nine characteristics of strong districts outlined in the document *Strong Districts & Their Leadership* could also be organized. The strategic planning process is an opportunity to foster strong and effective leadership practices.

QUESTIONS FOR REFLECTION

- How will our skills, expertise, and experiences inform the strategic planning process? Do individual trustees have experience with strategic planning and performance measurement?
- What gaps exist in our knowledge and competencies in terms of strategic planning and how will we fill them?
- What tools and resources do we have, and how can we use them efficiently to ensure we are well prepared for the strategic planning process?
- How can we build trustee capacity and ensure knowledge transfer to new trustees?

▶ Could Our Planning Process Benefit from the Perspective of a Third Party?

Some boards of trustees have found it helpful to engage an external consultant, facilitator, or coach, particularly if there has been a major change in the school board's operating environment, such as a high turnover of trustees or a change in provincial priorities. A third party can help identify trends and give a fresh, outside perspective. They can help with specific aspects of the planning process or with the overall process, to ensure that everyone is fully informed and prepared to participate. A third party can help a board of trustees to develop its own capacity and facilitate knowledge transfer. A third party should not do the work for the trustees, but rather support the trustees in doing their own work.

QUESTIONS FOR REFLECTION

- What part(s) of our strategic planning process might benefit from an external party's input?
- Does the third party under consideration demonstrate skill and experience at ensuring that equity and human rights are embedded in the strategic planning process?
- Will the third party be able to support us in identifying and mitigating our own unconscious biases[7] and in enhancing our understanding of systemic barriers to achievement and well-being in order to ensure equity of access and equity of outcomes for all students and staff?

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7. *Unconscious bias* is a term that refers to the tendency for all individuals and groups to unintentionally think and act in ways that perpetuate discrimination.

> " Equity and inclusive education aims to understand, identify, address, and eliminate the biases, barriers, and power dynamics that limit students' prospects for learning, growing, and fully contributing to society…. These barriers and biases, whether overt or subtle, intentional or unintentional, need to be identified and addressed.
>
> – *Equity and Inclusive Education in Ontario Schools: Guidelines for Policy Development and Implementation* (2014), p. 6

▶ How Will We Assign Responsibilities?

Strategic planning requires strong leadership to promote the process itself, to maintain momentum, and ultimately, to deliver an effective and inspiring MYSP. The director and the board of trustees should discuss who will be responsible for guiding the process and for ensuring that the strategic goals reflect the direction determined by the board of trustees.

Some boards of trustees may decide to establish a strategic planning committee[8] that dedicates time for strategic planning outside of regular monthly meetings. Smaller boards may choose to include all trustees on the committee and to rely heavily on senior administrators to support the plan's development. Larger boards may include only a few trustees on the committee. The committee should include, among others, those who have the greatest responsibility for carrying out the plan and reviewing its progress – the board chair, the director, and the senior administrators. First Nations trustees, as representatives of First Nations communities, must be fully engaged and should be considered for membership on the committee.

To fulfil the Ontario government's commitment to implementing the calls to action outlined in the Truth and Reconciliation report (*Truth and Reconciliation Commission of Canada: Calls to Action* [2015]), and the goals outlined in the *Ontario First Nation, Métis, and Inuit Education Policy Framework* (2007), the Indigenous Education Lead and/or another member of the Indigenous Education Advisory Council (IEAC) should be included as members of the committee. This ensures that the histories and current contexts of Indigenous communities in Ontario's publicly funded education system are considered throughout the strategic planning process.

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8 In this document, *committee* is used to refer to the group of individuals selected to oversee the board of trustees' strategic planning process.

> **❝** Mainstream Canada sees the dysfunction of Indigenous communities, but [has] no idea how that happened, what caused it, or how government contributed to that reality through the residential school policy. They do not realize that just as Indigenous children were taught that they were inferior, so were non-Indigenous children [taught that Indigenous children were inferior]. They do not realize that for the non-Indigenous child, this teaching had an insidious aspect – it reinforced a false belief in their own superiority. This too must be addressed. Most Canadians do not realize, therefore, that for there to be true reconciliation, they must be part of the solution.
>
> – The Honourable Justice Murray Sinclair, Chairperson of the Truth and Reconciliation Commission, speaking at the Ninth Session of the United Nations Permanent Forum on Indigenous Issues, New York, April 2010

Student trustees should also be fully engaged throughout the strategic planning process. As they are elected to represent the interests of students, they bring an important perspective to the table. The board may also wish to consider including members of the public on the committee, such as representatives from social service agencies and representatives in equity and/or human rights.

Whatever the structure and composition of the committee, it is important to clarify the roles and responsibilities at the outset (e.g. in a reference document). The committee should have the autonomy to make preliminary decisions and then seek input and approval from the board of trustees, as required.

QUESTIONS FOR REFLECTION

- How can we ensure that our committee is diverse and provides multiple perspectives?
- How will we make sure our committee includes individuals from outside the organization, such as business leaders, social service agency representatives, advisors with experience in equity and/or human rights, and community partners? Have we included service system managers of child care and early years programs?
- What will the mandate of our committee be during the strategic planning process?

▶ What Will Our Timelines Be?

The committee should determine both general and specific timelines – how long the plan will take to complete, and when to begin each step of the strategic planning process.

The time it takes to develop an MYSP varies widely. It can take as little as a few months or as long as a year, depending on the level of experience of the committee and senior administrators, their familiarity with the internal and external operating environments, and the extent of their plans for data gathering and formal stakeholder engagement.

The committee should determine specific timelines by establishing a final date for the new MYSP and then working backwards in the schedule until they arrive at the present. **There are no shortcuts in the process**. Each step is important. It takes time to create the plan, and this time needs to be planned for and protected from other competing priorities.

QUESTIONS FOR REFLECTION

- What staff capacity do we have to support the strategic planning process?
- Which parts of the process are dependent on predetermined timelines, such as budget submissions to the ministry? How can we plan accordingly?

▶ Have We Reviewed Our Mission, Vision, and Values Statements?

At this stage of the strategic planning process, the board of trustees should review its school board's mission, vision, and values statements. These statements are unique to each board and should reflect its beliefs, needs, and priorities. Mission, vision, and values statements guide the board in everything it does, including in the creation of the MYSP. They help ensure that the plan's strategic direction is aligned with the school board's purpose and its sense of who, and what, it represents. It is recommended that each board establish a regular and predictable review cycle for these statements. One recommended practice is to review them in the year prior to a new strategic planning cycle.

An organization's **mission** statement is a concise description of its purpose. Its **vision** statement is a vivid and engaging description of its idealized future state, and its **values** statement outlines its core beliefs.

A renewed vision is integral to the MYSP process. In response to the changing needs of the community and to evolving provincial priorities for education, a board's vision statement will probably change more frequently than its mission and values statements.

QUESTIONS FOR REFLECTION

- When was the last time we reviewed our mission, vision, and values statements? Do they still resonate?
- How do our mission, vision, and values statements reflect the legislated purpose and goals of public education in Ontario as well as our obligations under the Ontario Human Rights Code and related legislation? How do they reflect the specific circumstances of our school system and our schools? In Catholic and French-language school systems, for example, do the statements reflect the mandates of the respective systems?
- What are the views among our trustees and senior board staff members about the board's direction?
- To what extent will educators, principals, and other board staff and volunteers see themselves reflected in these statements?
- To what extent will everyone in the larger community see themselves reflected in these statements? How can we solicit community input?
- How can we create opportunities for our stakeholders to tell us what they expect from our board, based on our mission, vision, and values statements? What collaborative processes can we refine or create to support a fulsome review and refresh of these statements?
- Are the statements concise, clear, aspirational, and optimistic?

🔗 **SUPPLEMENTARY RESOURCE:**
Characteristics of Effective Mission, Vision, and Values Statements

Phase 2
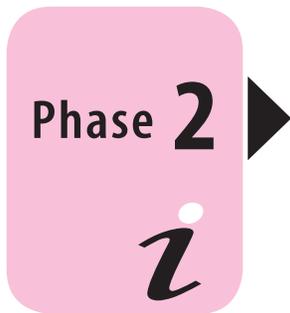
Gathering Information

When organizations make decisions that are grounded in the best available evidence, they are more purposeful about where they focus their efforts and channel their resources. For this reason, it is recommended that the committee gather a great deal of information and weigh it carefully before setting the strategic direction for its MYSP.

Gathering information tends to be time- and resource-intensive, but careful planning, with purpose in mind, will facilitate the most efficient use of resources. The information gathered needs to be current and relevant. New sources of information may also be needed. A discerning eye is required to sort through it and paint an accurate picture of what's really happening in the board. **Because it takes time to gather information, it is a good idea for the committee to update the board of trustees periodically throughout the two stages of this phase: data collection and formal stakeholder engagement.**

▶ How Will We Collect and Analyse Data?

Boards already have a wealth of existing data, so it is important to first understand what data is available and what data is needed for the strategic planning committee to do its work. The committee should prioritize gathering data that will support effective decision making on equitable outcomes for all students. This should include demographic data cross-referenced with student-level data on student achievement and well-being, and human

resources data on employment trends. Such a data set would support an analysis of intersectionality[9] and the complex realities of how people experience discrimination.

The first step in collecting data is to conduct scans of the board's internal and external environments. The second step is to analyse the data and identify the areas of greatest need. What follows is an overview of these two steps.

> " Educational leaders and school staffs who are committed to professional accountability and making informed professional judgments think of accountability not as a static numerical accounting but as a conversation, using data to stimulate discussion, challenge ideas, rethink directions, and monitor progress, providing an ongoing image of their school as it changes, progresses, stalls, regroups, and moves forward again.
>
> – Lorna Earl and Steven Katz, as quoted in "Using Data: Transforming Potential Into Practice", *Ideas Into Action for School and System Leaders*, no. 5 (2014), p. 4

QUESTIONS FOR REFLECTION

- What do we already know about students who face systemic barriers to achievement and well-being and are not thriving? What more do we need to know to support effective decision making?
- What type of evidence should we be gathering? How much? And to what end?
- How will the evidence we gather be used and shared by the board and relevant stakeholders?
- How can we collaborate with coterminous boards to gather data on the external environment?

9. Information on an intersectional approach to discrimination is available on the Ontario Human Rights Commission website.

Step 1. Scan the internal and external environments

It is important for the committee to understand the internal environment of the school board, including the impact of the previous MYSP, student achievement levels, student and staff well-being, employee satisfaction, parent engagement, school climates, student perceptions of safe environments and experiences of discrimination, the status of buildings and infrastructure, enrolment trends, succession planning patterns, and the projected retirement rates of school and board leaders. Indicators for quantitative and qualitative measurements, such as Early Development Instrument (EDI) data; trends in employee movement into, within, and out of the board – generally and according to demographics; the state of student and staff well-being; and reviews of board governance structures and processes, are all sources of relevant information for the internal environmental scan. It is also important to identify what is working well and to continue to support those areas.

It is equally crucial for the committee to understand the evolving nature of the external environment in which their school board operates. They should be aware of demographic shifts; immigration patterns; the economic, political, and social climates; changes in policies and legislation; changes in technology; legal requirements and Ministry of Education directives; education trends; local developments in policies and procedures; new collective agreements; and global influences. Effective external environmental scans consider the factors that may be contributing to the challenges faced by the most underserved students and those not meeting their full potential. In this regard, demographic data can be particularly instructive.

At this stage of the process, boards should leverage their relationships with municipal councils. When boards and councils share plans, data, and information, both are better equipped to provide enhanced services to the public they serve and to mutually support each other's initiatives. Boards are encouraged to maintain an ongoing responsive process with municipal councils within their jurisdiction as well as with municipal services organizations such as early childhood services, special needs services, mental health services, and police services. Such a partnership encourages wrap-around support for students who are struggling so that police, health care, and school officials can work together to support students and their families. Gathering information from municipal tables and sharing board data with those tables creates clearer thinking about the areas of the board's greatest need.

🔗 **SUPPLEMENTARY RESOURCE:**
Potential Sources of Information for Data Collection

Step 2. Analyse the data

Data analysis is how sense is made of the information gathered. Effective data analysis ensures that the areas of greatest need become the areas of focus. Some boards find that collaboration software helps them to identify and distil the areas of focus. However the data is analysed, it is important that the process be collaborative so that a common understanding emerges regarding the areas of focus.

Two commonly used approaches for analysing internal and external factors affecting an organization are: SOAR (Strengths, Opportunities, Aspirations, and Results) and SWOT (Strengths, Weaknesses, Opportunities, and Threats). The SWOT approach requires an organization to focus on both its strengths and weaknesses. SOAR is part of the Appreciative Inquiry (AI) school of thought, which maintains that looking at what an organization is doing well, and basing planning on its strengths, is a more effective way of creating successful new strategies. With the help of either of these approaches, the committee can develop an accurate picture of where the board is and where it should go. As they analyse the data, the committee should do the following:

- **Find the themes and outliers:** Themes that suggest a direction for the board will gradually emerge as the committee analyses the data. At the same time, it is important for the committee to identify the "outliers", or any evidence that may fall outside the primary strategic themes, as some of it may be significant.
- **Identify the tentative strategic priorities:** The committee sets the tentative strategic priorities that reflect the far-reaching results it would like to achieve across the board – in academics, well-being, equity, finance, employee relations, human resources, community partnerships, internal processes and procedures, and governance. These tentative strategic priorities will probably shift as the process unfolds, but having an initial set of priority areas provides a focus for the upcoming formal stakeholder engagement process (see the next section) and the planning process going forward.

QUESTIONS FOR REFLECTION

About the internal environment

- What progress have we made in realizing the four renewed goals for education outlined in *Achieving Excellence*? Consider achievement gaps; child and student well-being; safety and bullying prevention; global competencies and technology adoption; and parent engagement.
- What is our performance record for increasing equity of outcomes in student achievement? How are we measuring our impact, both

quantitatively (e.g., in terms of test scores) and qualitatively (e.g. in terms of critical thinking, collaboration, creativity)?

- What is our board's record in ensuring that its staff is demographically diverse and broadly representative of the public we serve?
- To what extent has our board been successful in using the principles of "targeted universalism"[10] in the development of all policies and practices?
- To what extent is our staff engaged and highly skilled? For example, in French-language boards, to what extent are staff members involved in enhancing the study and transmission of French language and francophone culture?
- How have we included and honoured the voices of all education professionals and staff throughout our strategic planning process?
- Do we have a strong Board Leadership Development Strategy (BLDS)? Does our BLDS ensure the hiring of high-quality staff and provide for their ongoing professional development? Does it support aspiring leaders from diverse backgrounds? What will be the board's future human resource needs?
- How can data and input from the Indigenous Education Advisory Council (IEAC) be used to better support decision making?
- What is the level of parent and community engagement in our board? What have we done to identify and remove barriers that prevent marginalized families from becoming more involved?
- Are we allocating our resources effectively to support the areas of greatest child and student need?
- In what ways does our governance structure reflect effective and transparent practices? (Consider legislative compliance, regular reviewing of board policies, trustee use of school board association professional development opportunities and other ministry supports, regular evaluation of the director's performance in realizing the goals of the MYSP.)

About the external environment

- How can we realize our commitment to reconciliation and contribute to the collective efforts necessary to repair the relationship between Indigenous and non-Indigenous peoples in Canadian society?

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10. Targeted universalism means finding the policy or process that would best serve the most marginalized groups, and then applying that policy or process to everyone. (john a. powell, Stephen Menendian and Jason Reece, "The Importance of Targeted Universalism", *Poverty & Race*, March/April 2009)

- What are the current and expected population and demographic trends in our community? Factors to consider include immigration and urbanization, religious and ethnic composition, socio-economic composition, and languages spoken. How will a changing student composition affect our equity and inclusion initiatives?
- What are the major economic and social justice issues affecting our community? Consider indicators such as housing, household income, employment, educational attainment of parents, the health and well-being of the broader community, child and family resources, and technology.
- What are the current and emerging trends in education? Do they address specific challenges facing students, children, staff members, trustees, and school communities (e.g., the new global competencies and digital tools required for secondary school students)?
- For hospital-based school authorities, what are the emerging trends for in-care settings?

▶ How Will We Engage with Our Stakeholders?

Engaging with stakeholders is fundamental to developing the MYSP and to ensuring that it is adopted and supported by the community. This guide makes a distinction between two types of engagement with stakeholders: ongoing community engagement and formal stakeholder engagement.

Ongoing community engagement happens on a regular basis, regardless of what the board of trustees is working on. It may involve weekly or monthly blog posts or website postings, live streaming of board and committee meetings, meetings with community members, or an "open door" approach in which the community is invited to raise issues and in which trustees proactively engage with their constituents. Ongoing community engagement helps turn stakeholders into partners and builds the board's relationships with individual and group members of the public. Ongoing and effective community engagement paves the way for strong formal stakeholder engagement when developing the MYSP because stakeholders are kept abreast of board decisions and are able to participate in their development.

It is important to note that building and maintaining stakeholder relationships is not as simple as hosting an open meeting and expecting that people will come. Those who feel marginalized or disengaged may not attend these meetings because they may feel unwelcome or disempowered. **It is the responsibility of the board to build and maintain good relationships with its many diverse communities and utilize their preferred process for engagement.** Relationship building takes thoughtful and sustained effort.

Formal stakeholder engagement is a part of the strategic planning process that involves actively soliciting the views, concerns, ideas, and questions of the board's communities, so that the committee can make informed, thoughtful, and courageous decisions. It takes time, partly because it requires the committee to see things through the lens of what matters to diverse stakeholders. It is efficient to make good use of existing structures, such as special education advisory committees, parent involvement committees, and community partnerships, as well as existing gatherings, such as senior administrator meetings, principal meetings, school council meetings, and student council meetings. The MYSP can be added to the meeting agendas, and in this way, the information and knowledge of existing groups can be utilized.

For formal stakeholder engagement to be meaningful and authentic, the committee may want to consider inviting stakeholders to help develop engagement processes, rather than simply responding to questions. Stakeholders can help identify others who should be engaged, develop and frame the engagement questions, and facilitate

the discussions. A collaborative approach can increase stakeholder ownership of the process and strengthens relationships with the board of trustees.

The formal process of engaging with stakeholders can be broken down into four steps; an overview of each step follows.

Step 1. Identify the stakeholders

Community voices are crucial, and not only the loud voices, but the quiet ones, the minority ones, the under-represented ones. The voices of children and students are important. Indigenous voices are important. Newcomer voices are important. Parent voices are important. The committee should ensure its list of stakeholders is robust and inclusive. Board staff should be invited to be heard. The committee should actively seek to hear from all parent and community groups – those speaking for children and students who are not achieving their full potential and those speaking for children and students who are thriving.

The ministry's policy on collaborative professionalism, Policy/Program Memorandum No. 159, offers guidance on how to consider the key interests of multiple groups, including unions, teacher federations, and other partners.

Step 2. Determine the engagement approach and questions

A formal stakeholder engagement process can be conducted in various ways – through online surveys, collaboration software, teleconferencing, interviews and focus groups, and town hall or community meetings. The focus of the engagement will determine which approach is best. Whatever approach is used, it must be accessible. The Accessibility for Ontarians with Disabilities Act (AODA), 2005 requires organizations to ensure that events and materials are accessible and that accommodations are offered. Upon request, accommodations must be made available to the best of the board's ability.

The committee may decide to use a variety of approaches to deepen their understanding of the broader community issues and concerns. Again, it can be useful to invite stakeholders themselves to help determine the best approach and to play a role in crafting questions that will resonate with their constituents, invite conversation, and elicit useful information. Some boards have had tremendous success with increasing student engagement by using social media and mobile technology (e.g., by asking students one question per week for four weeks). It is an effective practice to conduct an engagement in the languages of the constituents.

Questions should be brief, straightforward, open-ended, unbiased, and meaningful to the stakeholders. They should be based on the tentative strategic priorities, so that the stakeholders can see the committee has done its research and is providing them with something concrete to respond to.

It is important for the committee to think through *how* it will gather the stakeholders' input. Ideally it will do this in a way that facilitates both the stakeholder discussions and analysis of these discussions. The committee should choose what is right for the board and its constituency, and dedicate its resources to where it perceives the greatest need to hear different perspectives. The use of online collaboration software has dramatically increased the number and diversity of respondents in several boards. This software often has an analysis function that can provide enhanced data analysis in a short amount of time.

Step 3. Conduct the engagement

The committee may lead the engagement itself, work with a third-party facilitator, or, as mentioned above, engage stakeholders from either within or outside the board to facilitate the engagement process. For some boards, this process may take a few weeks; for others, several months. Stakeholders should be provided with multiple ways and opportunities to participate.

It is vital to capture the feedback from stakeholders accurately. The feedback that the committee receives should be reflected back to each stakeholder group to confirm that they were heard correctly. Some collaboration software programs build in a feedback function. However the confirmation process is conducted, it must invite engagement and relationship building. Once accuracy is confirmed, the committee should review all the input.

🔗 SUPPLEMENTARY RESOURCE:
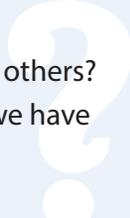**Guidelines for Formal Stakeholder Engagement**

Step 4. Analyse the findings

Effective analysis of stakeholder input is a vital step in the MYSP process. It allows the committee to translate stakeholder thinking into board action and ensures that all decisions are based on evidence. As part of its analysis of the feedback, the committee should do the following:

- **Find the themes and outliers:** Common themes that suggest a direction for the board will become apparent. It is also necessary for the committee to distinguish between popular opinion and important points made by sometimes unpopular, or minority, groups. The latter can bring to light real issues that need to be addressed.
- **Compare the stakeholder feedback to the research data:** The findings from the formal stakeholder engagement and the research data should be consistent. For example, if the data shows a widening achievement gap between certain student groups, the findings from the engagement should reveal the same concern. If there are significant inconsistencies, more research may need to be done. The problem may be misinformation, miscommunication, or poor data.

Finally, at this stage, it is important to revisit and refine the tentative strategic priorities, although they will remain tentative until Phase 3, "Developing the MYSP".

QUESTIONS FOR REFLECTION

- What were the notable variations in opinion across the stakeholder groups? Do these variations correlate with known or suspected systemic barriers to achievement and/or well-being?
- How can we make sense of any surprising or unexpected findings from the formal stakeholder engagement?
- In what ways do certain stakeholder groups seem more satisfied than others? What factors might be contributing to this? How can we ensure that we have considered how to meet everyone's needs?

Phase 3

Developing the MYSP

The research has been done. The formal stakeholder engagement has taken place. The information has been analysed. Now the committee must develop the MYSP. As it does so, it should periodically share the emerging plan with the board of trustees. Based on the evidence that has been gathered, the board of trustees and senior administrators must decide on the direction to take for the school board's future. **This phase requires some heavy lifting – everyone must engage together in reflection and strategic thinking.**

As the MYSP for the board is developed, the principles of equity and inclusion must be kept in mind. They need to be evident and visible throughout the plan. "Ensuring equity", one of the four renewed goals for education outlined in *Achieving Excellence*, must be woven into every aspect of the MYSP, including the strategic priorities and the strategic goals. Equity of outcomes sets the conditions for success in the other three renewed goals for education – achieving excellence, promoting well-being, and enhancing public confidence.

▶ What Would Be the Ideal Duration of Our MYSP?

Under the Education Act, the board of trustees is required to develop an MYSP that spans three or more school years. Boards of trustees should consider a four-year plan because it allows for short-term improvements to happen and for long-term improvements to begin to take shape. A four-year plan also aligns with the trustee

election cycle. One recommended practice is for the MYSP to run for the same duration as the trustee election cycle but offset by one year. This would allow incoming trustees to have a plan in place when they arrive and to participate in the creation of a new plan during their term of office.

▶ Which Strategic Priorities Should We Finalize?

A **strategic priority** is an area of high importance that an organization establishes in order to realize its vision. A strategic priority provides a framework for organizing, defining, and communicating strategic goals.

The **strategic goal(s)** are what an organization will achieve over the course of its strategic plan. Strategic goals are achieved through the initiatives that an organization implements.

It is now time for the committee to finalize its strategic priorities. A small number of ambitious priorities – three to five – is usually the most effective. Priorities identify the **direction** for the board. They should be courageous, focused, and unafraid to challenge the status quo. They should reflect all voices in the community and strive to transform the culture into one that supports higher achievement levels, a culture of respect for equity and human rights, and improved well-being for *every* child and student. They should be **responsible** and **responsive**. They should have the power to **motivate** every staff member, parent, child, and student.

QUESTIONS FOR REFLECTION

- Are our strategic priorities comprehensive and balanced – that is, concerned with *all* students, from their early years to adulthood, and with many facets of education (e.g., academics, equity, well-being, finance and governance, human resources, and community partnerships)?
- How can our strategic priorities be developed so that both internal and external stakeholders can see themselves reflected in them?
- Are our strategic priorities aligned with ministry priorities? Do they also address the local realities and mandates of our particular school system (e.g., French-language and Catholic school systems have particular interests and concerns)?
- Do our strategic priorities demonstrate the heart, mind, and identity of our board?
- Will our strategic priorities enhance public confidence in our board?

▶ What Criteria Should Determine Our Strategic Goals?

❝ Schools begin to change only when their leaders use equity as a lens to recognize the disparities that exist, and then intentionally develop, implement, and monitor clear, unambiguous action plans for producing the desired educational outcomes.

– Ontario Principals' Council, *Equity and Inclusive Education: Implementing Ontario's Equity and Inclusive Education Strategy* (2011), p. 5

Once the strategic priorities are finalized, the committee must develop the corresponding strategic goals that will provide focus to the priority areas and determine where to allocate the board's resources. Each strategic priority should have at least one strategic goal.

It is recommended that organizations adopt a small number of clearly defined goals that the board can focus on and achieve within the time frame of the MYSP. The goals should complement one another and present a unified vision of the future.

They should also be aligned with the vision, mission, and values statements of the board as well as with the ministry's renewed vision for education, outlined in *Achieving Excellence*.

Note that having a small number of goals also makes it easier for the trustees to monitor the board's progress and to appraise the performance of the director. (Phase 4, "Implementing and Monitoring the MYSP", provides more information on these reviews.)

The committee should strive to ensure that each strategic goal is:

- **Translatable** into short-term initiatives so that progress can be seen each year;
- **Enduring** over the multi-year period – not so specific or easily achieved that it becomes irrelevant after the first year of the plan;
- **Aligned** with the board's long-term vision;
- **Just within reach:** a stretch, but achievable.

QUESTIONS FOR REFLECTION

- Given our commitment to implementing the calls to action in the Truth and Reconciliation report, in what ways do our goals prioritize education and awareness about Canada's Indigenous histories and contemporary issues? In what ways will non-Indigenous students and staff fulfil their duties as treaty people? In what ways will the achievement and well-being of Indigenous children and students be demonstrated?
- How do our goals reflect a strong motivation to improve student achievement and the well-being of every child, student, and staff member?
- How do our goals reflect our commitment to ensuring equity for all?
- How have we utilized progress made on our previous MYSP to establish new aspirational, yet achievable, goals?

🔗 **SUPPLEMENTARY RESOURCE:**
A Framework for Assessing Strategic Goals

▶ How Will We Develop an Evaluation Framework?

Evaluation frameworks translate high-level strategic thinking into concrete plans of action. They do this by providing statements about what will be accomplished and how these accomplishments will be measured. They set clear and specific parameters

for implementation, and measurable metrics for monitoring and evaluating progress towards achieving the stated outcomes. Like a rubric a teacher uses to assess students' work, an evaluation framework provides clear expectations for the achievement of goals.

The primary structure for doing this work is the logic model. At this stage in the strategic planning process, the committee should work collaboratively to develop a high-level logic model for the MYSP as a whole. Later, in Phase 4, the director develops detailed logic models for each strategic goal in the MYSP.

Below is a template of a high-level logic model designed specifically for MYSP development. In the pages that follow, each step involved in creating this logic model is described.

Strategic Priority 1	Goal 1.1	Short-Term Outcome(s)	Intermediate Outcome(s)	Target(s)	Reporting Structure(s)
	Goal 1.2	Short-Term Outcome(s)	Intermediate Outcome(s)	Target(s)	Reporting Structure(s)
	Goal 1.3	Short-Term Outcome(s)	Intermediate Outcome(s)	Target(s)	Reporting Structure(s)
Strategic Priority 2	Goal 2.1	Short-Term Outcome(s)	Intermediate Outcome(s)	Target(s)	Reporting Structure(s)
	Goal 2.2	Short-Term Outcome(s)	Intermediate Outcome(s)	Target(s)	Reporting Structure(s)

Step 1. Articulate outcome statements for each goal

The committee should articulate a few outcome statements for each goal. Outcome statements are specific descriptions of what success will look like, so that the parameters are clear when the progress of each goal is measured. An outcome statement describes the desired impact of the goal.

When designing outcome statements, it is important to be explicit about equity. This keeps equitable results at the forefront of every strategic goal, embedding in the MYSP a focus on mitigating systemic barriers to student achievement and well-being. It also enables the monitoring and measuring of **adverse impact** – negative effects that seemingly neutral policies or practices have on a particular group(s).

Logic models often distinguish among short-term, intermediate, and long-term outcomes:

- **Short-term outcomes:** In the short term, changes can be expected in **learning, awareness, knowledge, and skills.** These outcomes are a direct result of the initiatives.
- **Intermediate outcomes:** In the intermediate term, an initiative will effect changes in **behaviours, practices, decision making, policies, and social action.**
- **Ultimate (or long-term) outcomes:** In time, an initiative will contribute to change in the **broader social sphere.** This type of change is seldom due to one initiative but, rather, to many factors. Generally, the ministry determines the ultimate outcomes (e.g., the key goals for education), so they do not need to be indicated in the logic model. However, school boards may decide to establish additional ultimate outcomes that reflect their specific contexts.

QUESTIONS FOR REFLECTION

- Do our outcome statements describe how our desired future state will be different from our current state?
- Do our outcome statements clearly show the skills and behaviours the MYSP will cultivate?
- To what extent do our intermediate outcomes (e.g., improvements in behaviors and practices) align with our strategic priorities and goals?
- Are our outcome statements hopeful and reachable? Do they make us smile?
- Are our goals SMART (Specific, Measurable, Attainable, Relevant, Time-based)? Do our outcome statements reflect our SMART goals?

Step 2. Determine targets for each goal

With a baseline in mind, the committee should use data to define targets that are a stretch, but reachable, for each goal. A target provides a stated objective to be achieved within a set period of time, against which results can be measured. In this way, targets help maintain progress towards achieving a goal.

Targets are not simple to set and must be carefully considered. Targets should be:

- **Achievable:** When designing challenging targets, it helps to visualize attaining the stated outcomes (described in Step 1).

- **Measurable:** It is important for those implementing and monitoring the initiatives that targets be based on real data.
- **Time-bound:** A specific time frame for each target provides a clear sense of when progress will be measured and assessed.

Targets can be set by comparing a board's current state to its ideal state. Based on the data, targets should be just within reach. In setting targets, it is useful to look at other successful boards in the province as well as at a board's past performance.

Step 3. Determine the reporting structures for each goal

It is important for the committee to indicate in the logic model *how* and *how often* the progress of each strategic goal will be reported to the board of trustees by the director or senior administrators. Some goals will require more regular tracking and reporting than others. Updating the board on progress towards a particular goal should be done in different ways – for example, in the form of stand-alone reports and as brief updates that are part of a larger item for discussion. The reporting structures established by the committee will provide the director with regular and reliable information on the status of goals, which will help the director develop the annual operational plan (in Phase 4).

QUESTIONS FOR REFLECTION

- How often will our community expect to hear updates on the progress of each strategic goal? How will the community provide feedback to us?
- Which strategic goals will require more time to show results? Which goals will show results more quickly?
- How can the Indigenous Education Advisory Council (IEAC) be utilized to best support and guide our monitoring and reporting structures?

Determining the reporting structures is the final step in the development of the high-level MYSP logic model. Once the MYSP logic model is completed, the building blocks of the MYSP are in place. Now it is time to write the narrative.

▶ How Can We Tell Our MYSP Story?

In order for the board's communities to see themselves reflected in the plan and to understand how the MYSP came to be what it is, the committee should use story and narrative to transform the MYSP logic model into an accessible and engaging document. The story that is told should be one that everyone can relate to.

When the committee writes the MYSP document, it should balance facts and figures with student anecdotes, school descriptions, and invitations to the children, students, staff members, parents, and other community members to be part of bringing the MYSP to life. In this storytelling mode, the committee can tell what it learned in the information-gathering phase, why it chose the priorities and goals it did, and how it has put equity at the forefront of its process. In short, everyone should be made to feel as though they were at the table sharing in the decision making.

▶ When Should We Submit Our MYSP for Final Approval?

An MYSP is ready for the approval process when it meets the requirements outlined in the checklist below.

OUR MYSP:
- ☐ is aligned with relevant provincial legislative requirements and addresses local circumstances
- ☐ puts our mission, vision, and values statements into practice
- ☐ reflects the diverse perspectives of the children, students, parents, staff, and communities within the board
- ☐ reflects the interests of our educators, administrators, and support staff
- ☐ maps out continuous, focused improvement for the board
- ☐ is written in plain language
- ☐ has been reviewed by the Indigenous Education Advisory Council (IEAC), and the council has been given an opportunity to provide feedback
- ☐ is courageous, feasible, inclusive, and, above all, focused on improving student achievement and student and staff well-being
- ☐ has a strong likelihood of building public confidence in our board

Before submitting a final copy of the MYSP to the board of trustees, the committee should submit a copy for review. During the review process, the board of trustees may decide to revisit the views of the stakeholders to ensure that their feedback has been accurately captured. Other revisions may also be requested before the board of trustees gives its final approval of the MYSP. The process of refining and approving the plan should give the committee, and the board of trustees as a whole, a sense of delight and accomplishment.

▶ How Will We Create a Communications Plan?

The communications plan should name the multiple ways in which the board will communicate information about the MYSP, both at the plan's launch and throughout the life cycle of the plan. To launch the plan, a variety of communication tools and methods should be used, including posting the document online, hosting staff and advisory committee meetings, and sending a report home to parents.

As part of their communications plan, many boards create two versions of their MYSP – a full version with all the details included, and a streamlined version for broader publication. In the interest of transparency, each board should make its full plan publicly available on its website or at least be prepared to share the full version of its plan with the public upon request. Both versions should tell the MYSP story and invite everyone to participate in making the plan a living reality.

In all communications, the messaging of the plan must be consistent and clear. Communications should also be ongoing. The MYSP should be visible and communicated often at the school and board levels. In schools, the board should use posters, signs, and teacher and school email and website communications to clearly link classroom and school initiatives to the MYSP. This keeps everyone moving together towards shared goals.

At the board level, trustees and senior administrators should include MYSP language in all email and website communications. This will ensure that the MYSP guides their decision making and actions, and enhances the transparency of the board's operations. Board and school leaders should be encouraged to continually reinforce the priorities and goals of the MYSP – both internally (during meetings, as part of professional development, in classrooms and schools, at school assemblies), and externally (at community events). In this way, everyone is accountable for the plan's success and sees their contributions reflected in the plan.

QUESTIONS FOR REFLECTION

- How does our communications plan ensure that our stakeholders know they were heard and considered?
- What variety of communications methods will we use to provide all stakeholders with access to the MYSP, in both digital and non-digital formats?
- How can educators, school administrators, senior administrators, and trustees take advantage of communications opportunities to bring the MYSP to life?

🔗 **SUPPLEMENTARY RESOURCE:**

Key Considerations for the Communications Plan

Implementing and Monitoring the MYSP

The director and the board of trustees each have specific responsibilities for putting the MYSP into practice and monitoring it. These are outlined in the following pages as chronological steps. Alignment and coherence between the MYSP and board- and school-level operational and improvement plans is critical to ensuring that the MYSP vision and goals are realized.

▶ What Are the Director of Education's Responsibilities?

Step 1. Develop logic models for each strategic goal

In Phase 3, "Developing the MYSP", the committee developed the high-level logic model for the MYSP. Now, in Phase 4, the director works collaboratively with senior administrators to develop a detailed logic model for each strategic goal. While this is the director's responsibility, it is important that the board of trustees understands what is involved in developing these logic models. These detailed logic models help to organize board-level implementation and monitoring of each goal. They should include the initiatives, inputs, outputs, and outcomes, as well as performance measures, data collection tools, reporting structures, and champions. The template on the following page, which defines these terms in relation to one another, can be used when developing detailed logic models for each strategic goal.

Strategic Goal	Initiative(s)	Input(s)	Output(s)	Short-term Outcome(s)	Intermediate Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Reporting Structure(s)	Champion(s)
An achievable and realistic expression of the desired outcome(s)	What the board does – actions, processes, events – to achieve the desired outcome(s)	What the board requires to launch the initiative(s) – staff time, supplies, capital funds	What demonstrates to the board that the initiative(s) took place – materials produced, ideas generated, new processes developed	Directly attributable to an initiative's outputs *Lead to change in awareness, knowledge, skills, access*	Expected to logically occur once short-term outcome(s) are achieved *Lead to change in behaviour, action, decision making*	Indicate the effectiveness of an initiative – that is, whether it is achieving the desired outcome(s)	Facilitate reliable, regular, and easy collection of data	Provide regular and reliable tracking of the progress made towards each goal	Ensure individual accountability for each goal

Once the detailed logic models have been developed for *each goal*, it can be very helpful for additional performance measures and data collection tools to be developed for *each outcome*. This degree of attention to detail allows senior administrators and the director to see trouble spots and bright spots and to use the additional information to inform their decisions as the initiatives progress.

Note that the logic models for each strategic goal should be used at the board and school levels to ensure that all initiatives are aligned with the MYSP and will support progress towards the stated goals. As Step 5 explains, the director should "embed data collection mechanisms and reporting structures into all board and school operations."

🔗 SUPPLEMENTARY RESOURCE:
Tips on Understanding Detailed Logic Models

Step 2. Develop the annual operational plan

Under the Education Act, the director is responsible for the implementation of the MYSP. The director therefore works collaboratively with senior administrators to create an annual operational plan that identifies the key initiatives that will help advance the MYSP's strategic priorities and goals. This plan, which is also known as the Director's Annual Plan, translates the strategic policy direction of the MYSP into high-level procedural reality. It ensures that board planning is operationally aligned with the MYSP to support student achievement and well-being. The logic models created for each strategic goal (in Step 1 above) will greatly inform the development of the annual operational plan.

Step 3. Develop improvement plans

The annual operational plan provides a blueprint for the implementation of the MYSP throughout the board. Once the director has created this plan, the board and school improvement plans can be developed. These plans are also operational plans in the sense that they focus on the details of how to bring the MYSP to life.

In the creation of the **board improvement plan**, the director works collaboratively with senior administrators to further delineate how the strategic priorities and goals of the MYSP will be acted upon throughout the board. In the creation of **school improvement plans**, the director and senior administrators work collaboratively with school leaders, parents, teachers, and the broader community to transform the strategic priorities and goals of the MYSP into concrete school-level initiatives.

When the director ensures that *all* the plans are aligned with the MYSP (as in the graphic below), this increases the likelihood of consistent and sustained progress towards achieving the strategic priorities and goals of the board.

Board Vision

Operational and Improvement Plans

School and Board Initiatives

MYSP
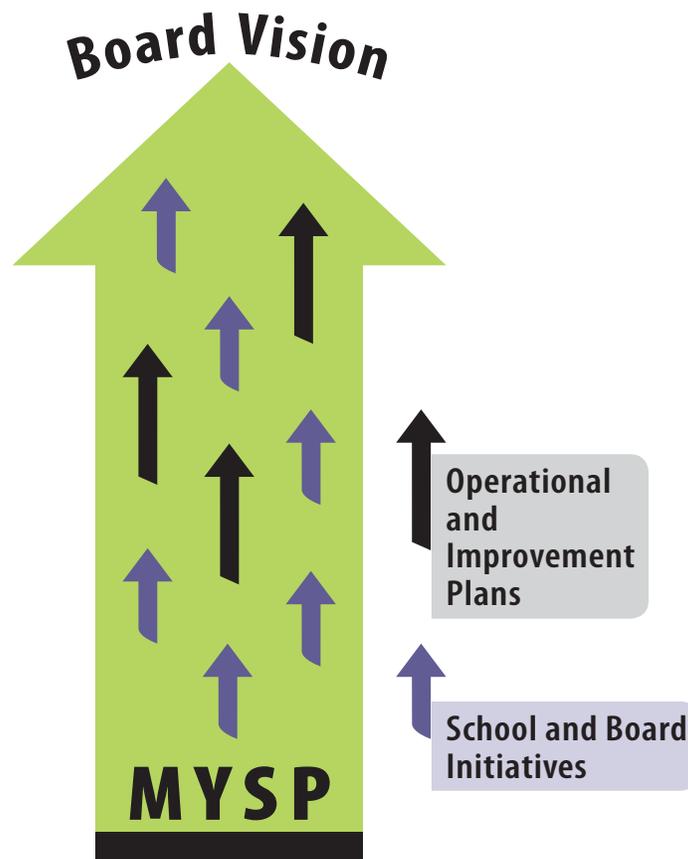
Step 4. Develop the annual board budget

The director, with the support of the senior administrators and the budget committee, develops the board budget, which is presented to the board of trustees for approval. **The board budget is a dollar-based reflection of the MYSP, with the same strategic priorities and goals identified and supported**. It ensures a strong stewardship of resources and a commitment to improving student achievement and well-being. The board budget development process must be trans-transparent and collaborative and involve key stakeholders. Note that the board budget also reflects the projected cost of the annual operational plan. Developing the budget is thus an iterative process, involving ongoing dialogue between the board of trustees and senior administrators.

The board of trustees must adhere to the budget submission date set by the ministry.

Step 5. Embed data collection mechanisms and reporting structures into all board and school operations

The director is responsible for ensuring that the data collection mechanisms and reporting structures identified in the logic models for each strategic goal and those identified for particular outcomes are embedded into all board and school operations, including the annual operational plan and the improvement plans. When data collection mechanisms and reporting structures are embedded into all operations, monitoring the MYSP is not additional work, but part of regular practice. There are three stages of this process:

- **Generating the data:** Once all the plans have been created, data collection tools should be identified and embedded into the initiatives. At every level of the board, from the classroom level up, data collection tools should support monitoring and evaluation of initiatives. For every initiative that is planned, the following question should be asked: "How will we know if we're succeeding?" The mechanisms for generating data, embedded into all the initiatives, will provide the answer to this question.
- **Storing the data:** The data that is generated needs to be collected and stored so that it can later be analysed and referenced. It is recommended that the director create repositories for the data. These repositories will be a reliable source of information when creating future operational and improvement plans, and during the next MYSP cycle, when conducting the internal environmental scan.
- **Analysing the data:** Directors should analyse the data themselves or ensure that they have sufficient staff to do this. Small boards may choose to share staff for this function or hire a consultant for a month or two each year to analyse the data. Boards may also purchase collaboration software that supports data collection and has an analysis function.

Step 6. Monitor the progress of the MYSP

With data regularly gathered, stored, and analysed, monitoring progress becomes more manageable for the director and senior administrators. The findings will provide them with an accurate and comprehensive flow of information from the ground up, and will allow for the evaluation of overall performance in an ongoing manner. The impact of each initiative can be assessed and each initiative can be refined as necessary. Board structural practices, student achievement, and the well-being of students and staff should all be evaluated and monitored.

Step 7. Report regularly to the board of trustees

Under the Education Act, the director must review the MYSP annually with the board of trustees. The director must also update the board of trustees on the progress of the MYSP. It is recommended that these updates be conducted semi-annually or quarterly so that the trustees are regularly kept up to date on the board's progress towards achieving its goals.

🔗 SUPPLEMENTARY RESOURCE:
Sample Templates for the Director of Education's Regular Reports

▶ What Are the Board of Trustees' Responsibilities?

Step 1. Approve the annual board budget

As mentioned above, the director, with the support of the senior administrators and the budget committee, develops the budget. The budget is then presented to the board of trustees for approval. **The budget reflects the proposed cost of implementing the strategic priorities of the MYSP, as outlined in the annual operational plan.**

Step 2. Share the MYSP with the community

Community interest and involvement in board planning varies. Some members of the public are very engaged and want to know what's going on in their schools and in their community. Others may feel disengaged or marginalized. Sharing the MYSP is an opportunity for outreach to the community and for building partnerships and shared ownership of public education. In this regard, it is important to demonstrate that the MYSP was developed through evidence-based decision making and has taken into account multiple voices within the community. But the data alone is not enough. The story of the MYSP must be told. Parents, students, children, and community

partners all need to know how *every* child and student is being supported to be successful – this includes those who are thriving and those who are struggling.

Step 3. Monitor progress of the MYSP

The board of trustees can practice its evaluative thinking skills by assessing how much progress has been made towards the achievement of the stated strategic goals. (The MYSP logic model, developed in Phase 3, identifies how often progress on these goals is to be reported on.) This reporting enables the trustees to monitor and evaluate the MYSP in an ongoing manner and to use evidence to think systemically and intentionally about how to move the school board to its desired future state. This is also a good time for the board of trustees to take stock of its performance as a governing body, specifically in relation to the MYSP, through a self-evaluation process. The director's annual report, submitted to the board of trustees each December, should be aligned with the MYSP and provide the board of trustees with measures that show progress towards the MYSP goals.

Step 4. Review the MYSP annually

Under the Education Act, the director must review the MYSP annually with the board of trustees. With this evaluation comes the opportunity to measure success, to determine what to do about strategic goals that have not been met, and to consider how to communicate any updates to the public. In some boards, the trustees' annual review of the MYSP is undertaken as part of the development of the director's annual report. In other boards, the two processes are separate, with information from one process informing the other.

The annual review of the MYSP provides an opportunity for the board of trustees to keep the MYSP at the forefront of all board decision making. With its final destination in view and with built-in structures to provide constant feedback on its progress, the MYSP is more like a GPS than a static map. If an initiative is not working, or something has taken the board off course, the MYSP can lead everyone back on track and keep them moving in the right direction. Annual reviews of the MYSP can also provide evidence to inform the review and updating of the board and school improvement plans and ensure that all operations are aligned with the MYSP. The director's regular reports (as discussed in the previous section) further support the annual review. Some boards may wish to review progress on the MYSP semi-annually or quarterly.

Step 5. Review the director of education's performance

The hiring and evaluation of the director, and the creation and monitoring of the MYSP, are among the most important roles of the board of trustees. The Education Act requires each board of trustees to review its director's performance. **Since one of the director's primary responsibilities is to operationalize the MYSP, it is incumbent on the board of trustees to base its appraisal of the director's performance on how much progress has been made towards the MYSP's priorities and goals.** It is strongly recommended that these reviews be conducted annually.

Step 6. Report regularly to the community on the progress of the MYSP

It is good practice for the board of trustees to report regularly to the broader community, providing the public with substantive information about the progress that has been made towards achieving the goals in the MYSP. Both the director's reports to the board of trustees and the board of trustees' reviews of the MYSP are excellent documents to use for this purpose.

It is important for the community to have access to information about student achievement and well-being. Since trustees are the point of access to the school board for members of the public, the ongoing communication that trustees provide will help build public trust in education and help each board to develop a stronger relationship with its community.

Looking Ahead

Our students and children have hopes and dreams. They strive to learn and do new things. They strive to have close relationships with their peers and with adults. They yearn for a sense of connection and belonging. They want to be valued and respected and to feel competent and capable. They want to contribute.

This is why our schools must be places where children and students feel safe to ask questions, to build friendships, to make their dreams a reality. They must feel accepted. They must feel confident in their identity and be proud of their cultural heritage, their beliefs and faiths, their first languages. We must foster their curiosity so that they can discover their own learning potential. We must make it easy for them to make smart choices.

To do all of this, our staff must have all the tools and support they need to put their good planning into action. Parents and families must be encouraged to become strong partners in the education of their children. In this way, our communities will benefit from the strength, resiliency, and innovative thinking of our students and children. Our students and children will bring the care, creativity, and integrity they learned at school into the workforce and into their roles as citizens.

All children and students deserve to be sustained in their efforts to pursue their own unique paths, to have equitable access to opportunity and achievement. Public education should be the great equalizer. It is our collective responsibility to make this happen and to ensure that each and every student experiences success.

It matters.

It makes a difference.

It is in our hands.