

# Multi-Year Strategic Planning

A Guide for School Board Trustees

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## Who Are Our Students?

Our students live in apartments, houses, hotels, shelters, foster homes, and group homes. They live in communities that are rural, urban, quiet, exuberant, fast-paced, connected, isolated, or somewhere in between.

Our students come from varied family structures, including those married or not, led by moms and dads, single parents, same-sex partners, elders, grandparents, aunts, uncles, siblings, guardians, or caregivers. Some live on their own.

Our students come with many experiences. Some have ancestral connections to land/place. Some have been here for generations, some were born here, and some have migrated or have come as refugees. Some of our students have long histories in our communities and some have made their way to our schools from places around the world. They have varying experiences, of wealth and privilege, political conflict, struggle and/or persecution.

Some of our students are Indigenous, and/or come from different racial, cultural, and ethno-cultural backgrounds. Some of our students practice their faith in places of worship such as temples, synagogues, churches, gurdwaras, and mosques; they engage their spirituality in our forests, fields, and in their homes and centres. For some, their faith is reflected in their manner of dress, the symbols they carry, their lived experiences or in their silent prayers. Some of our students do not follow any faith at all.

Our students are differently abled, young, early years, adolescent, and adult learners. They come to us in various degrees of mental, spiritual, physical, social, and/or emotional health. They speak many languages, and possess unique talents and skills. They do not come to school simply as individuals but as members of families and communities. Our students are reflections of histories and experiences, as well as the future potential and hope for themselves, their families, their communities, and our world. Some plan for survival and some for greatness. They all have hopes and dreams.

– Inclusive Education Branch, Leadership and Learning Environment Division,  
Ontario Ministry of Education



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## Introduction

Every school board in Ontario is governed by a board of trustees<sup>1</sup> that has the legislated responsibility to ensure the creation of a multi-year strategic plan (MYSP).<sup>2</sup> The MYSP drives the school board<sup>3</sup> forward and is a core building block of good governance. Unlike the annual plans created by the director of education,<sup>4</sup> the MYSP spans several years and sets direction at a high level. The annual plans must align with and support the larger vision of the MYSP. The MYSP is fundamental to building public trust in Boards to not only safeguard our schools, but to ensure that they are caring, equitable, innovative, and flexible. Our schools must offer stability at the same time as they meet the changing needs and realities of society.

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

To help ensure the success and well-being of *every* child and student, Boards should strive to create MYSPs that are courageous, hopeful, and resilient. The MYSP should be relentless in its efforts to meet the needs of individual 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 are continuing to expand beyond academics. Our understanding of equity is becoming increasingly sophisticated yet inequity of outcomes for students is persisting. Our demographics are shifting due to immigration in some communities and population decline in others. All these realities require that Boards show leadership and drive and that they collaborate closely with families, staff, and community members. The MYSP is the primary opportunity for Boards to put leadership and collaboration into action.

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

- detailing the allocation of the board’s resources, so that it can achieve its strategic priorities;
- functioning as a guide for the Board and senior administrators when they are making difficult choices;
- illustrating to stakeholders how choices were made;
- focusing the board’s attention when it is dealing with unexpected challenges, and preventing reactive or short-sighted decision making;
- being a source of unity and cohesion among diverse internal and external stakeholders;
- motivating the board’s staff and giving purpose and meaning to day-to-day responsibilities at every level of the organization.

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<sup>1</sup> In this document, *Board*, with a capital “B”, is used to refer to the board of trustees.

<sup>2</sup> 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.

<sup>3</sup> The terms *school board* and *board* are used in this document to refer to district school boards and school authorities.

<sup>4</sup> In this document, *director* is used to refer to the director of education.

An effective MYSP will also:

- help boards to reach the renewed provincial goals outlined in [Achieving Excellence \(2014\)](#);
- 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 among educational stakeholders;
- engage communities in ongoing conversations about education;
- stand as a beacon to create a measurably better future for all children, students, and staff.

The Ministry of Education’s 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 the necessary conditions of trust and shared thinking required to improve student achievement and the well-being of students and staff. PPM No. 159 builds on a shared commitment outlined in [Achieving Excellence \(2014\)](#).

Throughout the strategic planning process, communication and engagement with internal and external communities is vital and confirms respect for and inclusion of all voices. Effective communication and engagement should include providing regular updates; opening doors for discussion, feedback and input; and ensuring that the process follows the principles of the Ontario government’s Inclusive Design approach.<sup>5</sup> 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 in the process of developing and monitoring their MYSPs. It builds on the innovative and bold work Boards have done to date. Ontario has one of the best public education systems in the world and this is due, in large part, to the **clear and flexible thinking of Boards across the province**, which have prioritized the success and well-being of *every* child and student.

Boards should understand that even while existing targets are being realized, new goals are continually being considered. It is only when Boards recognize that “the work is never done” that underserved children and students and those who are not meeting their full potential experience real and tangible improvement.

The eighty-two school boards in Ontario include English and French school boards, public and Catholic school boards, and school authorities. This guide strives to meet the needs of all school 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.

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<sup>5</sup> Inclusive Design is a process and an approach focused on achieving inclusion at the design stage. It regards inclusion as an inherent aspect of everything a school board does, not just as an add-on. Inclusive Design is currently being developed by the Ministry of Education’s Inclusive Education Branch, in the Leadership and Learning Environment Division.

Although this guide is written primarily for trustees, it will be useful for all those 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, is responsible for operationalizing the MYSP. This guide names the specific accountabilities the director has, and identifies the key moments when the director must support and work collaboratively with the Board. Note that, in some cases, the director may delegate responsibilities to senior administrators (e.g., ask them to write reports to the Board on the progress of strategic goals or to help develop the board operational plan), but the director remains accountable to the Board for the performance of any functions so delegated.

The Board chair, the director, and members of the senior administration all play a pivotal role in the development of the MYSP, as do board support staff, parents, 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 focusses on the key phases involved in developing and monitoring the strategic plan. Recognizing that different boards have very 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 different boards of trustees are at different stages in the strategic planning process. While the strategic planning process is essentially the same for all Boards, each individual Board can determine the best way to use this guide in the development of its MYSP. The process is not always linear and the various phases may well overlap and inform each other in circuitous ways.

Most sections in this document include electronic links to Ministry of Education support documents or resources that can be useful in the strategic planning process.

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

Finally, it is important to note that the strategic planning process, and the MYSP itself, are most effective when they act in concert with the leadership framework outlined in [The Ontario Leadership Framework \(2013\)](#). This framework provides an overview of how leadership practices can best promote student achievement and well-being. One component of this framework is the document [Strong Districts & Their Leadership \(2013\)](#), which defines a strong district as “successful at improving student achievement and well-being, and at closing gaps in both of these outcomes” (page 9). The document identifies nine characteristics of strong districts:

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 strategic planning process for the MYSP offers many opportunities for Boards to make these nine characteristics seen, felt, and heard. The characteristics can each claim their place in the MYSP planning process. This guide does not explore the nine characteristics, but does note points of coherence.

## The MYSP Process

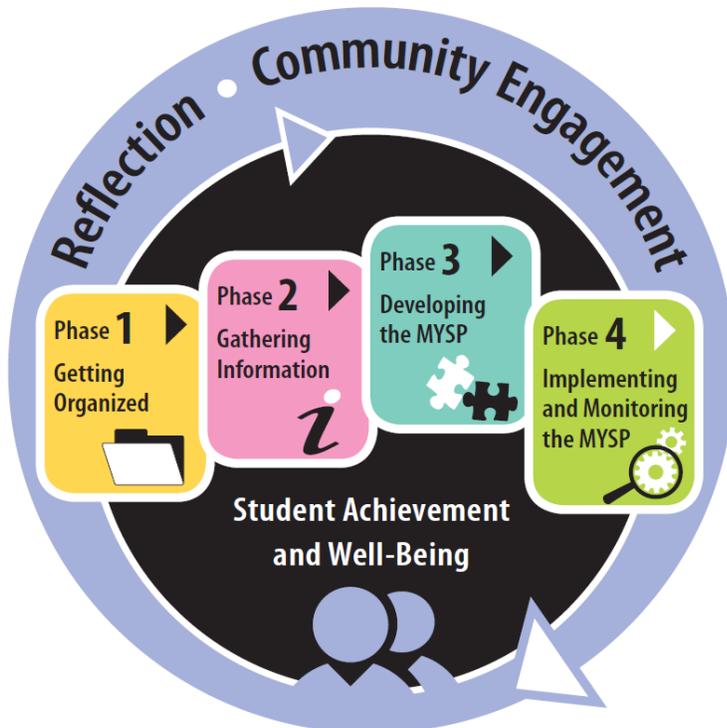
As set out in the Education Act, every school board must create a multi-year plan that spans a minimum of three years. The purpose of this plan is to help school boards set long-term strategic priorities and goals. Once the MYSP is developed, all other short-term planning must align with it and build towards its long-term vision.

The board of trustees sets the strategy for the school board's plan, keeping a keen eye on where the school board should be heading in order to best serve its student population. The strategy must be based on evidence to ensure that the plan has a clear purpose and that it is effective. It is then up to the director of education to make the MYSP an operational reality.

It is the responsibility of both the Board and the director to create and maintain processes for capturing institutional memory of what's been learned in the development of the MYSP. Finding a structure for this information will make the MYSP accessible to all incoming trustees and directors. This action is vital to informing all future strategic planning processes.

Throughout the MYSP process, it is important that good use is made of existing structures, such as special education advisory committees, parent involvement committees, and community partnerships, as well as existing gatherings, such as administration council meetings, principal meetings, school advisory council meetings, and student council meetings. The MYSP can be added to already existing agendas, and in this way, the information and personal know-how of already existent groups can be utilized.

The MYSP process involves four phases, presented in this MYSP overview graphic:



Phases 1, 2, and 3 can take up to a few months each to complete, while Phase 4 can last anywhere from three to five years, until the board is ready to develop a new plan.

Each phase in the process is discussed in detail in the following pages.

**Online Ministry Resource: Legal Obligations for Multi-Year Strategic Planning**

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

## Phase 1: Getting Organized

In order for the development of the MYSP to be efficient, effective, and meaningful, it is important to first devote time and attention to getting organized. Reviewing and defining the process at the outset will also ensure that future discussions stay focused on the content of the MYSP, rather than going off topic to procedural questions or next steps.



### How Can We Best Build Capacity?

Building capacity involves improving both strategic thinking and strategic planning. They 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 benefits from ongoing practice and reflection. An external facilitator can support the Board's skills development in 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 that will drive the whole organization forward. Through orientation sessions, workshops, and retreats, the trustees, the director, and senior administrators should review the planning process for the previous MYSP – what can be learned from it, and how it can be improved.

#### Questions for Reflection

- What skills, expertise, and experiences of our Board can inform the strategic planning process (e.g., individual trustees' experience with the board and/or from other organizations in strategic planning and the use of performance measurement for monitoring and evaluation)? What gaps exist and how will we fill them?
- What tools and resources do we have and how can we maximize efficient use of what we have to ensure that our Board is well prepared for the strategic planning process?
- How can we build capacity and ensure knowledge transfer from the existing Board to new members?

This is a perfect time to organize a workshop on the nine characteristics of strong districts outlined in [Strong Districts & Their Leadership \(2013\)](#). The strategic planning process offers the opportunity to provide structure to implementing strong leadership practices.

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

Some Boards 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 large turnover of trustees or a change in provincial or board goals. A third party can help identify trends and give a fresh, outside perspective. It can help with specific aspects of the planning process or with the overall process, so that trustees and senior administrators are fully prepared to participate. A third party can also help a Board develop its own capacity and facilitate knowledge transfer. A third party should not do the work for the Board, but rather support the Board in doing its own work.

### Questions for Reflection

- What part(s) of our Board's strategic planning process might benefit from an external party's input?
- How will engaging a third party help our capacity development for strategic planning? Does the third party under consideration:
  - demonstrate skill and experience at ensuring equity is at the forefront of the strategic planning process;
  - demonstrate competency to help the trustees name and understand their own emotional barriers to appropriately addressing equity and unconscious bias?

## How Will We Assign Responsibilities?

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

Boards ought to establish a strategic planning committee<sup>6</sup> to allow for dedicated time for strategic planning outside of monthly Board meetings. Smaller Boards may choose to include all trustees on the committee, and may choose to rely heavily on senior staff to support the plan's development. Larger Boards may select particular trustees to sit on the committee. The committee should include, among others, those who have the greatest responsibility for carrying out and reviewing progress on the plan – the Board chair, the director, and other senior administrators. First Nations trustees, as representatives of the board's students from First Nations communities, must be fully engaged and should be considered for membership on the committee.

In fulfilling the Ontario government's commitment to implementing the calls to action outlined in the [Truth and Reconciliation Commission of Canada \(2015\)](#), and the goals outlined in the [Ontario First Nation, Métis, and Inuit Education Policy Framework \(2007\)](#), it is strongly recommended that boards include the Indigenous Education Lead and/or another member of the Indigenous Education Advisory Council (IEAC) on the committee.

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<sup>6</sup> In this document, *committee* is used to refer to the group of individuals selected to oversee the Board's 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.

– Senator Murray Sinclair, Chair of the Indian Residential Schools 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 in Grades 7 to 12 and thus bring an important perspective to the table.

Whatever the structure and composition of the committee, it is important that the roles and responsibilities are articulated at the outset (e.g., in a terms of reference document) to avoid confusion later in the process. The committee should have the autonomy to make preliminary decisions about the process, and later seek input and approval from the Board, as required.

#### **Questions for Reflection**

- How can we ensure that our committee is intentionally diverse, to provide multiple perspectives?
- What knowledge, skill sets, and experience are needed on our committee?
- How will we make sure our committee includes individuals from outside the organization, such as business leaders, social service agency representatives, and community partners (e.g., municipal child care and early years service system managers)?
- What will be the mandate of our committee during the process?

#### **What Will Our Timelines Be?**

The committee needs to determine two things at this point – how long the plan will probably take to complete and when to begin each step of the strategic planning process.

The time it takes to develop the MYSP varies widely. It can take as little as a few months or as long as a year, depending on the experience of the Board and senior board staff, their familiarity with the internal and external operating environments, and the extent of their plans for data gathering and consultation.

It can be helpful for Boards to determine timelines by starting with a date for the new MYSP and working backwards in the schedule until they arrive at the present. There are no shortcuts to the process. Every step is necessary. It takes time to create the plan, and that time needs to be planned for and protected from other competing priorities.

#### **Questions for Reflection**

- What staff capacity do we have to support the process?

- Which parts of the process are dependent on pre-determined timelines, such as budget submissions to the ministry? How can our Board plan accordingly?

## Have We Reviewed Our Mission, Vision, and Values Statements?<sup>7</sup>

One of the most important things that a Board should do at this stage of the strategic planning process is to review its mission, vision, and values statements. These statements are unique to each board and should be reflective of each board's beliefs, needs, and priorities. Mission, vision, and values statements guide the organization in everything it does, not just in the creation of the MYSP. For the MYSP in particular, however, the mission, vision, and values statements help ensure that the direction the Board takes aligns 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 public education, a Board's vision statement will probably change more frequently than its mission and values statements. The mission, vision, and values are statements of shared identity within the board. They should be arrived at through a process of collaborative professionalism so that everyone knows their voices have been heard.

### Questions for Reflection

- What are the views among our Board and senior board staff members regarding the board's direction?
- When was the last time we reviewed our mission, vision, and values? Do they still resonate?
- 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? How can collaboration processes support a fulsome review and refresh of the mission, vision, and values?
- How do our mission, vision, and values statements reflect the legislated purpose and goals of public education in Ontario? How do they reflect the specific circumstances of our school system and our schools (e.g., in Catholic and French-language boards, do they reflect the mandates of their respective systems?)
- To what extent will *everyone* in the larger community see themselves reflected in these statements? How can we solicit community input?
- To what extent will teachers, early childhood educators, principals, and other board staff and volunteers see themselves reflected in these statements?
- Are the statements concise, clear, aspirational, and optimistic?

### Online Ministry Resource: Effective practices for developing mission, vision, and values statements

<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>

<sup>7</sup> The practices described in this section align with the effective school board practices identified in the document [Strong Districts & Their Leadership \(2013\)](#).

## Phase 2: Gathering Information

According to research, evidence-based decision making leads to better results for organizations because it allows them to be purposeful about where they are focussing their efforts and channelling their resources. This means that the strategic planning committee need to gather a great deal of information and weigh it carefully before setting the strategic direction for their MYSs.



Gathering information tends to be time- and resource-intensive, but careful planning, with purpose in mind, will facilitate the most efficient use of limited resources. The information gathered needs to be new, relevant, and the result of a discerning eye – thus helping to 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 periodically throughout the two stages of this phase: data collection and stakeholder consultation.**

### How Will We Collect and Analyse Data?<sup>8</sup>

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, regroup, 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](#)

Data collection can feel like an overwhelming and onerous task, but it does not have to be. 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 concerning equitable outcomes for all students. This can include identity-based data and student-level data. Such a data set would support an analysis of intersectionality<sup>9</sup> and the complex realities of how people experience discrimination. A common first step in collecting data is to conduct scans of the internal and external environments.

#### Questions for Reflection

- What do we already know and what more do we need to know?
- What type of evidence should we be gathering? How much and to what end?
- How will this evidence be used and shared by the board and relevant stakeholders?

#### 1. Scan the external and internal environments

It is crucial for the committee to understand the evolving nature of the external environment in which their schools operate. They should be aware of demographic shifts; immigration patterns; the current economic,

<sup>8</sup> The practices described in this section align with the effective school board practices identified in the document [Strong Districts & Their Leadership \(2013\)](#).

<sup>9</sup> Information on an intersectional approach to discrimination is available on the [Ontario Human Rights Commission website](#).

political, and social climate; changes in technology; legal requirements and Ministry of Education directives; trends in education; local developments in policies and procedures; new collective agreements; and global influences. Effective 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.

It is also important for the committee to understand the board's internal environment, including the impact of the previous MYSP, student achievement levels, student and staff well-being, employee satisfaction, parent engagement, school climates the general climate of the schools, the status of buildings and infrastructure, enrollment trends, succession planning patterns, and the projected retirement rates of school and system leaders. Indicators for quantitative and qualitative measurements, such as the early development instrument results, staff turnover rates, measures of well-being of students and staff, and reviews of the governance structure and processes of the Board, 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.

## **2. Analyse the data**

Data analysis is how sense is made of the information gathered. Effective data analysis ensures that the areas of need become the areas of focus. Priority areas will start to emerge as the committee works together to analyse the data. 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 is collaborative so that a common understanding emerges regarding the areas of focus.

There are three commonly used approaches for analysing external and internal factors affecting an organization: Appreciative Inquiry (AI), SOAR (Strengths, Opportunities, Aspirations, and Results) and SWOT (Strengths, Weaknesses, Opportunities, and Threats). With the help of one of these approaches, the committee scans their environments to develop a picture of where they currently are and where they want to go. More information on these approaches can be found by following the link on the next page, to the online resource.

### ***Find themes and outliers***

As they look through the data, the committee will see themes emerging that suggest a direction for the board. At the same time, it is important to identify the "outliers," or any evidence that may fall outside the primary strategic themes, as some of it may be significant.

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\*](#)

### ***Identify tentative strategic priorities***

Based on their analysis of the data, the committee can propose tentative strategic priorities for the board. These tentative priorities are the far-reaching results the board would like to achieve across different areas, such as academics, well-being, finance, employee relations, human resources, community partnerships, internal processes, 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 stakeholder consultations (see below) and the Board's process going forward.

## **Questions for Reflection**

### **External Environment**

- What are the current and expected trends in our community population and demographic composition (e.g., in immigration, urbanization, religion, ethnic composition, languages spoken), and how will a changing student composition affect equity and inclusion? What are the major economic and social justice issues affecting our community?
- How can we realize our commitment to reconciliation and contribute to the collective efforts to repair the relationship between Indigenous and non-Indigenous peoples in Canadian society?
- What are the current promising practices and emerging trends in education for each age group? For example, are there new global competencies and digital tools for high-school students?
- For hospital boards, what are the emerging trends in in-care settings that can be brought to bear on strategic planning?

### **Internal Environment**

- What is our performance record with respect to increasing equity of outcomes in student achievement and well-being? How are we measuring our impact both qualitatively (e.g., in terms of critical thinking, collaboration, creativity) and quantitatively?
- To what extent is our staff engaged and highly skilled? How have we included and honoured the voices of all education professionals and staff throughout our strategic planning process? How will we prepare for future human resources needs?
- How can data and input from the Indigenous Education Advisory Council be used to better support decision making of the committee?
- What is the status of parent and community engagement in our board? What have we done to identify and address barriers to achievement and well-being for underserved groups and those not meeting their full potential?
- In what ways is our Board's governance structure reflective of effective and transparent governance practices? How do we know?

## **Online Ministry Resource: Data Collection and Analysis to Support Strategic Planning**

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## How Will We Consult with Stakeholders?<sup>10</sup>

Consultations are fundamental to developing the MYSP, and to ensuring that the MYSP is adopted and supported by the community. Consultation is a broad term, so this guide makes a distinction between **community engagement** and **stakeholder consultation**.

**Community engagement** is what happens on a regular basis, regardless of what the Board is working on. It can take many forms, such as updates on how the Board has addressed issues raised by the community as well as other ongoing work. It may involve weekly or monthly blog posts or website updates, meetings with community members, or an “open door” approach for the community to raise issues.

**Stakeholder consultation** is a formal part of the strategic planning process, with the specific purpose of seeking out the ideas, concerns, 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. As mentioned earlier, in “The MYSP Process” section, many existing structures within the board can and should be used during stakeholder consultations. This process aligns directly with the ministry’s policy on collaborative professionalism. Consulting with these groups and taking advantage of their gatherings ensures that everyone in the board is invited to think strategically and to connect their purpose and the work they do directly with the MYSP.

For consultations to be meaningful and authentic, the committee may want to consider inviting stakeholders to help develop the process itself rather than simply responding to questions. Stakeholders can help identify other stakeholders, develop and frame the consultation questions, and/or facilitate the discussions. This collaborative approach increases stakeholder ownership of the process and strengthens Board and stakeholder relations.

Careful planning is required to identify all relevant stakeholders, determine the consultation approach, conduct the consultations, and analyse the findings.

### 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 be sure 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 parents and community groups – those speaking for the most underserved children and students, those speaking for students who are not achieving their full potential, and those speaking for students who are thriving.

The ministry’s policy on collaborative professionalism offers guidance on how to include key interests, such as unions, teacher federations, and other partners.

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<sup>10</sup> The practices described in this section align with the effective school board practices identified in the document [Strong Districts & Their Leadership \(2013\)](#).

## 2. Determine the consultation approach and questions

The focus of the consultation will determine which approach will be best. Consultations can be conducted through various means, including online surveys, collaboration software, teleconferencing, focus groups, interviews, and town hall or community meetings. The committee can use a variety of consultation 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 constituents, invite conversation, and elicit useful information. Consideration should also be given to conducting consultations in the languages of constituents.

Consultation questions should be brief, straightforward, open, unbiased, and meaningful to the stakeholders. They should be based on the tentative strategic priority areas, so that the stakeholders can see the committee has done its research and is providing them with something to respond to. If the Board is in the process of reviewing its mission, vision, and values statements, questions about these should be included.

It is important for the committee to think through *how* it will gather the stakeholders' input – ideally in ways that will best facilitate both the stakeholders' input and the committee's analysis of the stakeholders' thoughts and concerns. The committee should choose what is right for the board and the 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.

## 3. Conduct the consultations

The committee may lead the consultations themselves, or engage others from either within or outside the board to facilitate them. For some boards, this process may take a few weeks; for others, several months. It can be useful to provide multiple ways and opportunities for people to participate.

It is vital to capture the feedback from stakeholders accurately. The feedback that committees receive should be reflected back to each stakeholder group to confirm that they were heard correctly. Some collaboration software programs have this type of feedback option built in. However it is conducted, this confirmation process helps support the relationship between the Board and the stakeholder groups. Once this confirmation is received, it is time for the committee to review all the input from the various stakeholder groups.

### Questions for Reflection

- How have we heard from all of our stakeholders, particularly from those representing underserved students and students who are not achieving their full potential? What else can we do to reach these stakeholders?
- How have we engaged Indigenous communities as partners?
- How did we engage all education professionals, at all levels, in fostering and sustaining the conditions for collaborative professionalism? What more should we do?
- Have we engaged stakeholders that have a particular interest in our system? For example, for French boards, have we heard from French-language and culture organizations and advocacy groups? For Catholic boards, have we heard from diocesan bishops, diocesan staff, and parish communities? For

hospital boards, have we heard from coterminous school boards and treatment facilities, including local hospitals?

#### 4. Analyse the findings

Effective analysis of the stakeholder input is a vital step in the MYSP process. It translates stakeholder thinking into board action and ensures decisions are made based on evidence.

##### *Find themes and outliers*

Analysis of the stakeholder feedback, like analysis of the data, will reveal themes and outliers. It is important 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.

##### *Cross-reference stakeholder feedback with data collected*

The research data and the findings from the consultations should align. For example, if the data shows a discrepancy in achievement levels and/or well-being for a particular demographic group, consultation with that group should have revealed the same concern. If there are significant inconsistencies between the input from stakeholders and the data collected, 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 identified earlier, although they will remain tentative until the plan is developed, in Phase 3.

##### **Questions for Reflection**

- What were the notable variations in opinion across stakeholder groups? Do these variations correlate with known or suspected systemic discrepancies in achievement and/or well-being?
- How can we make sense of any surprising or unexpected findings?
- In what ways do certain stakeholder groups seem more satisfied than others? What factors contribute to this?

##### **Online Ministry Resource: Conducting Stakeholder Consultations**

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

### Phase 3: Developing the MYSP<sup>11</sup>

The research has been done. The consultations have taken place. The information has been analysed. Now the Board and the senior administrators must work closely together to make the key decisions about where the school board needs to go over the coming years. **This involves some heavy lifting.** This is the time for the information from the MYSP committee to be brought to the Board, and for the members of the Board to engage together in reflection and strategic thinking.



As the plan is developed, it is important to keep in mind that the principles of equity and inclusion need to be evident and visible throughout its entirety. “Ensuring equity”, one of the four renewed goals for education outlined in *Achieving Excellence: A Renewed Vision for Education in Ontario (2014)*, must be woven into every aspect of the MYSP, including into the strategic priorities and the strategic goals, which are discussed below. Ensuring equity is a goal, as well as a driver, that helps the board to achieve the other three renewed goals for education – achieving excellence, promoting well-being, and enhancing public confidence.

### What Would Be the Ideal Duration of the MYSP?

The length of time a MYSP covers varies from board to board. Under the Education Act, the board of trustees is required to develop a multi-year plan that spans three or more school years. A four-year plan is considered a good length because it allows for short-term improvements to happen and for long-term improvements to take shape. A four-year plan also aligns with the trustee election cycle. One recommended practice is for the MYSP to run as a four-year cycle offset with the trustee election cycle. This allows 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.

#### Questions for Reflection:

- How can our strategic planning cycle be designed to support incoming trustees?
- How can the time frame for our MYSP be designed so that the annual review of the MYSP takes place when it can meaningfully inform the development of the annual system and school plans?
- What time frame or duration for our MYSP will allow us to be flexible and adaptive to changing needs while also enabling long-term progress?

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<sup>11</sup> The practices described in this section align with the effective school board practices identified in the document [Strong Districts & Their Leadership \(2013\)](#).

## Which Strategic Priorities Should We Finalize?

A **strategic priority** is an overarching, high-level priority that an organization establishes in order to realize its vision. A strategic priority provides the framework for organizing, defining, and communicating strategic goals. A **strategic goal** is what an organization will achieve over the course of the strategic plan. A strategic goal is achieved through activities and/or initiatives an organization implements in order to realize its vision.

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. These priorities point the **direction** for the board. They should be courageous, focused, and unafraid to challenge the status quo. They should reflect all the voices in the community and strive to transform the culture towards higher achievement levels 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

- How can our strategic priorities be comprehensive and balanced – concerned with all students, from the early years to adulthood, and with many facets of education (e.g., academics, equity, well-being, financial and governance issues, human resources, and community partnerships)?
- How can our strategic priorities be developed so that the internal and external stakeholders can see themselves reflected in them?
- Do our strategic priorities align with both ministry priorities and address local circumstances?
- Do they 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 can then develop the corresponding strategic goals. These goals will provide focus to specific priority areas and determine where resources will be allocated.

An effective practice is to have a manageable number of goals that the board can focus on and make significant progress towards. The committee should recommend the number of strategic goals, based on the board's context and resources. Each strategic priority should have at least one strategic goal. Generally, a small number of focused goals is recommended.

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

- **Translatable** into short-term initiatives and actions so that progress can be seen each year;

- **Enduring** over the multi-year period: goals should not be so specific or easily achieved that they become irrelevant after the first year of the plan;
- **Aligned** with the boards' long-term vision;
- **Just within reach:** goals should be a stretch, but achievable.

#### Questions for Reflection

- Given our commitment to implementing the calls to action of the *Truth and Reconciliation Commission*, 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 students be demonstrated?
- Are our strategic goals focused and courageous, showing significant internal motivation to ensure the achievement and well-being of every child, student, and staff member?
- Do our goals reflect a focus on achievement, equity, and well-being?

#### Online Ministry Resource: A Suggested Framework for Assessing Strategic Goals

<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>

### How Will We Develop an Evaluation Framework?

Evaluation frameworks translate high-level strategic thinking into concrete plans of action, with statements about what will be accomplished and, most notably, how the Board will know it has been accomplished. They set clear and specific parameters for implementation, and articulate measurable metrics for monitoring and evaluating progress towards outcomes. Like a rubric a teacher uses with students, an evaluation framework provides clear expectations, and makes gathering data and monitoring it more focused, streamlined, and easier to manage.

Creating an evaluation framework requires a series of steps – some to be done by the director and some to be done by the committee in collaboration with the director.

The primary structure for doing this evaluative work is the logic model. Logic models are concise graphic representations of how an organization does its work; it links activities to the outcomes that help reach the goals. Developing logic models is an effective way of ensuring that the plan is implemented properly and that progress towards goals can be measured. Creating logic models also makes the research stage of the next strategic planning cycle simpler.

The chart below is a template of a logic model that was designed specifically for MYS development. Each step for completing the logic model is described in detail below.

Determined by the Committee				Determined by the Director of Education				
Strategic Priority 1	Goal 1	Target	Intermediate Outcome(s)	Short-Term Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Champion(s)	Reporting Structure
	Goal 2	Target	Intermediate Outcome(s)	Short-Term Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Champion(s)	Reporting Structure
	Goal 3	Target	Intermediate Outcome(s)	Short-Term Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Champion(s)	Reporting Structure
Strategic Priority 2	Goal 1	Target	Intermediate Outcome(s)	Short-Term Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Champion(s)	Reporting Structure
	Goal 2	Target	Intermediate Outcome(s)	Short-Term Outcome(s)	Performance Measure(s)	Data Collection Tool(s)	Champion(s)	Reporting Structure

### 1. Articulate outcome statements for each goal

What does success look like? Each goal should be accompanied by outcome statements – specific descriptions of what success looks like – so that when measuring the progress of each goal the parameters are clear. An outcome statement describes the desired impact.

**When designing outcome statements, it is important to be explicit about equity.** This keeps equitable results at the forefront of every goal, embedding into the MYSP a focus on mitigating systemic discrepancies in student achievement and well-being. This also enables the monitoring and measuring of **adverse impact**.

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 directly associated with the program outputs, which indicate that the activities to achieve the goals have taken place. (Activities, inputs, and outputs, and their relation to outcomes are discussed in greater detail in Phase 4). The director, in collaboration with board staff, determines the short-term outcomes.
- **Intermediate outcomes:** In the intermediate term, an initiative will effect changes in **behaviours, practices, decision-making, policies, and social action**. The committee determines the intermediate outcomes, in collaboration with senior administrators.
- **Ultimate (or long-term) outcomes:** In time, an initiative will yield change in the **broader social sphere**. This change can seldom be directly attributed to a specific program, but rather has many contributing factors. For the most part, the ministry determines the ultimate outcomes. School boards may have 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 behaviours and skills the MYSP will cultivate?
- How do we know that our intermediate outcomes (e.g., improvements in behaviors and skills) align with the strategic priorities and goals of our MYSP?
- Are the outcome statements hopeful and reachable? Do they make us smile?
- Are our outcome statements SMART (Specific, Measureable, Attainable, Relevant, Time-based)?

## 2. Determine targets for each goal

For each goal, the committee should define a target that is a stretch but reachable. A target provides a stated objective to be achieved within a set period of time, against which results can be compared. Targets are typically used as motivation to achieve specific results. They are not simple to set and must be carefully considered. Here are the three main characteristics to keep in mind:

- **Achievable.** Targets should be motivational but attainable. They should be designed with an eye on achieving the stated outcomes.
- **Realistic.** Targets should be based on data. This is important for those responsible for implementing the activities that will produce the desired results.
- **Time-bound.** Targets should have a time frame that provides a clear sense of when progress will be measured and assessed.

Ideally, targets should be set according to baseline data, so that boards know the target is realistic. Targets are sometimes based on past performance (i.e., past data is used to forecast forward) or on results that other boards or similar jurisdictions have achieved. In many cases, a target may be that of a high-performing board in the province.

## 3. Determine performance measures and data collection tools

**How will the director know if progress is being made?** A performance measure is an indicator of a program's effectiveness – that is, whether a program is achieving what it was intended to achieve. To ensure focused and reliable monitoring, the director and senior administrators must make sure every outcome statement specifies multiple ways of assessment, through clearly identified performance measures. A number of existing measures provide **quantitative** data on student achievement, including Education Quality and Accountability Office (EQAO) scores, credit accumulation information, and pass rates. Other quantitative tools may be created. **Qualitative** measures involve monitoring students' development, learning, and well-being, which may not be easily evaluated. Qualitative measures may be available or may need to be created through surveys, online community boards, focus groups, or interviews.

**Performance measures demonstrate that the outcomes have been realized.** Once the performance measures have been articulated, the **data collection tools** for each performance measure need to be identified. It can save time and resources to leverage data collection tools already in use. The director can also develop new structures for collecting data at the operational level, thus embedding data collection tools into the board's operational and improvement plans.

## 4. Name a champion (or two) for each goal

Strategic goals frequently cross departments and functions within a board. However, when the MYSP is being developed, the director should name a person who is willing and able to be responsible for a strategic goal. The success of each strategic goal requires a champion to ensure progress towards the goal and accountability for it. In certain circumstances, where it is necessary to encourage coherence between and among board priorities and goals, it can be useful to assign more than one champion for each goal.

### Questions for Reflection

- How will we determine who has sufficient understanding of the strategic goal to champion it?
- Are staff members prepared to champion more than one strategic goal?
- What are the Board's expectations of the champion(s) – for both collaboration and reporting?

### 5. Determine the reporting structure for each strategic goal

It is important for the director to articulate in the MYSP the agreed-upon schedule for **how** and **how often** progress on each strategic goal will be reported to the Board. Some strategic goals will require more regular tracking and reporting to the Board than others. The frequency and type of reporting the Board requires will help the director develop the operational plan (discussed in Phase 4).

### Questions for Reflection

- How often will our community want to hear updates about our progress on each strategic goal? How can 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 be utilized to best support and guide our monitoring and reporting structures?

Once the MYSP logic model is completed, the building blocks of the MYSP are in place. Now it's time to write the narrative.

### Online Ministry Resource: More information on Evaluation Frameworks and Logic Models

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

### How Can We Tell the MYSP Story?

The MYSP will be shared within the board and with the public. In order for people to see themselves reflected in the MYSP and to understand how the MYSP came to be what it is, the committee should use story and narrative to shift the MYSP logic model into understandable descriptions, explanations, and invitations.

When the committee writes the MYSP document, it can be helpful to balance facts and figures, charts and structures, with student anecdotes, school descriptions, and invitations for children, students, staff members, parents, and other community members to be a part of bringing the MYSP to life. As part of this storytelling, the committee can tell what it learned in the information gathering phase, why it chose the priorities and goals it did, and how it 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 decision-making.

## MYSP Checklist

When reviewing the completed MYSP, here are some questions to keep in mind to ensure that the plan is ready to be approved by the Board:

- Does our MYSP align with legislative requirements and address local circumstances?
- Does our MYSP put the mission, vision, and values statements into practice?
- Does our MYSP reflect the diverse perspectives of our children, students, parents, staff, and the overall community of the board?
- Will our employees (educators, administrators, support staff) see themselves reflected in our MYSP?
- Does our MYSP map out continuous, focused improvement for the board?
- Is our MYSP written in plain, inclusive language to enable clear understanding by everyone?
- Has the Indigenous Education Advisory Council reviewed the MYSP and been given an opportunity to provide feedback?
- Is our MYSP courageous, feasible, inclusive, and, above all, focused on improving achievement and well-being?
- Will our MYSP build public confidence in our board?

## When Will We Submit the MYSP for Final Approval?

Before bringing the MYSP to the Board for final approval, the committee should give the Board a copy of it to review. During the review process, the Board may decide to revisit the views of the stakeholders to ensure that their feedback has been captured. The Board may also ask for other revisions before giving its final approval of the MYSP. The process of refining and approving the plan, should give the Board a sense of delight and accomplishment.

## How Will We Create a 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 be prepared to share the full version of its plan with the public upon request, or make the full plan publicly available on its website. In-person presentations, electronic notices, news releases, and printed summaries of the plan are all ways of ensuring the board’s plan becomes known to organizations, parents, and other stakeholders.

Senior administrators should also consider how they will share the MYSP with board staff, teachers, early childhood educators, students, and children. It is important that the MYSP be visible and communicated often at the school level, using posters, signs, and other supporting materials. System and school leaders should be encouraged to continually reinforce the priorities, goals, and actions of the MYSP – during meetings, in classrooms and schools, and throughout the board. In sum, everyone should see themselves and their work reflected in the MYSP.

### Questions for Reflection

- How does our communications plan ensure that our stakeholders know they were heard and considered?
- How does our communications plan tell a story that the community can relate to?
- What variety of communications methods does our communications plan use to ensure that all stakeholders can access the MYP, in both digital and non-digital formats?

### Online Ministry Resource: Key Considerations for the Communications Plan

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

## Phase 4: Implementing and Monitoring the MYSP<sup>12</sup>

The MYSP sets out a far-reaching vision and ambitious goals for the future. Implementing the MYSP – realizing its vision and goals – is a challenging process and requires coherence between the MYSP and the annual plans. The director and the Board each have specific responsibilities for putting the MYSP into practice and monitoring it. These responsibilities are outlined below.



### What Are the Director’s Responsibilities?

#### 1. Develop logic models for each goal

In Phase 3, the director worked with the Board to develop one overarching logic model for the MYSP. Now, in Phase 4, the director works collaboratively with board staff to develop a detailed logic model for each goal. These logic models organize system-level implementation and monitoring for each goal in service of achieving MYSP goals and priorities. They are detailed, and should include activities, inputs, and outputs, as well as short-term and intermediate outcomes, performance measures, data collection tools, reporting structures, and champions.

**Activities** are the actions taken to achieve the goals. **Inputs** are the resources used to implement activities. **Outputs** tell us that the activities have taken place. For example, “hosting a religious diversity workshop” is an **activity** designed to meet the goal of “increased religious inclusion”. The cost of the workshop is an **input**. “X number of students participated in the workshop” is an **output**, and “a decrease in the percentage of students who hide their religious identity at school” is an **outcome**.

These logic models can also be used at the school level to ensure that school-level activities and initiatives align and support system-level operations, and to provide schools with possible data collection mechanisms (see point 4 below).

#### 2. Develop annual plans and align them with the MYSP

One of the director’s main responsibilities is to create an annual operational plan for the MYSP and to make sure all the other system and school-level annual plans are working in concert with the MYSP to achieve the desired goals. This alignment of all the plans increases the likelihood of consistent and sustained progress.

#### *System/board operational plan*

As set out in the Education Act, the director is responsible for the implementation of the MYSP and therefore creates an annual operational plan for it. The director’s annual operational plan supports the implementation of the MYSP by identifying the key initiatives and activities that will help advance its strategic priorities and goals. This process ensures that the board is operationally aligned with the MYSP to support student achievement and well-being. The logic models created for each strategic goal will greatly inform the operational plan.

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<sup>12</sup> The practices described in this section align with the effective school board practices identified in the document [Strong Districts & Their Leadership \(2013\)](#).

### *System/board improvement plan*

The director and senior administrators develop an annual board improvement plan for student achievement. The director, however, is responsible for ensuring that this plan aligns with and supports the MYSP. While the improvement plan may contain goals beyond those in the MYSP, it is important that it be aligned with the MYSP. Misalignment indicates that the board may not have the required level of focus on its MYSP or that it has overlooked changing realities related to student achievement and well-being.

### *School improvement plan*

The director is responsible for making sure all the individual annual school improvement plans are aligned with the annual board improvement plan. This alignment of the school and board improvement plans supports overall progress towards achieving the strategic priorities and goals of the board, as outlined in the MYSP. It involves taking the overarching ideas of the MYSP and transforming them into concrete school-level actions.

### **3. Develop the budget**

The director, with the support of the senior administrators and the Board budget committee, develops the board budget, which is presented to the Board for approval. **The board budget is a dollar-based reflection of the MYSP, with the same strategic priority areas and goals identified and supported.** It ensures the strong stewardship of resources dedicated to promoting student achievement and well-being. The board budget development process must be transparent and should rely on collaborative professionalism. Note that the board budget also reflects the projected cost of the annual operational plan. Developing the budget is thus an iterative process involving multiple consultations between the Board and senior staff.

The Board must adhere to the budget submission date set by the ministry.

### **4. Embed data collection mechanisms into all operations**

The director is responsible for ensuring that data collection mechanisms and reporting structures are embedded into all board operations. Earlier, in the development of the MYSP, outcome statements, performance measures, and data collection tools were specified. At this point, the director should ensure that all needed data collection mechanisms exist or are created, and that all are embedded into the operational plan. When data collection mechanisms are embedded into board operations, then collecting the information needed to monitor the MYSP is not additional work, but part of regular operations. This makes monitoring and reporting to the Board manageable and reliable. There are three stages of this process:

- **Generating the data:** In the MYSP, the data collection tools are identified. As all the annual plans are created, data collection tools should be identified and embedded into their programs and initiatives. At every level of the board, from the classroom level up, data collection tools should support monitoring and evaluation. For every activity and initiative that is planned, the following question should be asked: “How will we know if we’re succeeding?” Mechanisms for generating the data to answer this question should be embedded into regular activities.

- **Storing the data:** The data that is generated needs to be collected and stored so that it can be analysed and referenced. It is recommended that the director create repositories for the data. These repositories can be a reliable source of information when creating annual operational and improvement plans, as well as during the next MYSP cycle, when the internal environmental scan is performed.
- **Analysing the data:** To analyse the data, directors should ensure they have sufficient staff to provide regular reports to the Board, or, alternatively, do the analysis themselves. Small boards may choose to share staff resources or share in hiring a consultant for a month or two each year to analyse the data. They may also purchase collaboration software that supports data collection and has an analysis function.

## 5. Monitor progress

With data regularly gathered, stored, and analysed, monitoring progress becomes manageable for the director and senior administrators. The findings provide the director with an accurate and comprehensive flow of information from the ground up, and allow for the evaluation of overall performance in an ongoing manner. Both structural practices and student achievement should be evaluated and monitored so that the impact of an initiative can be assessed and the initiative itself can be refined.

### Online Ministry Resource: Monitoring and Evaluation Templates

*<THESE LINKS WILL GO LIVE WHEN THIS DOCUMENT IS PUBLISHED>*

## 6. Report to the Board regularly

With ongoing monitoring and evaluation of the MYSP, the director can provide consistent and regular updates to the Board. It is a recommended practice that the director provide quarterly reports to the Board, so that the trustees are kept up to date on the progress of the MYSP, and can inform their constituents.

The Education Act places responsibility on the director to: review the MYSP annually with the Board, ensure that measures and resources are identified, implement and monitor the plan, and report regularly to the Board. The director's annual report, submitted to the Board each December,<sup>13</sup> must align directly with the MYSP and provide the Board with measures that show progress toward the MYSP goals.

## What Are the Board's Responsibilities?

### 1. Approve the budget

As mentioned above, the director, with the support of the senior administration and the Board budget committee, develops the budget. Once it is final, the budget is presented to the Board for approval. The budget must reflect how money will be spent on the priorities of the board. **The MYSP determines the budget; therefore, the budget reflects the cost of implementing the strategic priorities of the MYSP and the proposed operational plan.**

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<sup>13</sup> As required by section 283(3) of the Education Act, the director's report must be submitted at the first meeting of the board of trustees in December.

## 2. Share the MYSP with the community

Community interest and involvement varies. Some members of the public are very engaged and want to know what's going on in their schools and 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.

It is important to share as much data as possible with the public, in order 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. Tell the story. Parents, students, children, and community partners need to know how every child and student is being supported to be successful – those children and students who are well-served and those who are underserved, those who are thriving and those who are struggling.

## 3. Monitor progress

Boards can practice their evaluative thinking skills by assessing how much progress has been made towards the achievement of stated goals. Earlier, in the development of the MYSP (Phase 3), the director articulated reporting structures to ensure that all important information would make its way to the Board. These reporting structures enable the Board to monitor and evaluate the MYSP in an ongoing manner. When the Board practices evaluative thinking, it builds the Board's capacity to use evidence to inform decisions and to think systemically and intentionally in order to move the school board to its desired future state.

## 4. Review the MYSP annually

Each Board is required by legislation to review its MYSP on an annual basis. With this evaluation comes the opportunity to evaluate success, to determine what action to take concerning strategic goals that have not been met, and to consider how to communicate any updates to the public. In some boards, the 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 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 actions. **With its final destination in view and constant feedback on 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 provide evidence to inform the board's annual system and school plans and ensure that all operations align with the MYSP.

### Questions for Reflection

- In what ways are the strategic priorities and goals still **relevant** to our context?
- How **effective** are our programs and initiatives at addressing the needs of students and achieving progress?
- How **efficient** are we at using board resources to achieve progress towards our goals? What other methods could we use?

## 5. Review the director's performance

The hiring and evaluation of the director, and the creation and monitoring of the MYSP, are the two most important roles of the Board. The Education Act requires each Board to review its director's performance. Since the director's primary role is to operationalize the MYSP, it is incumbent on the Board to base its appraisal of the director's performance on progress made towards the MYSP's priorities and goals. It is strongly recommended that these reviews be conducted annually.

## 6. Communicate progress to the public regularly

It is good practice for the Board to report regularly to the public, providing the public with substantive information about the progress that has been made towards achieving the goals and targets in the MYSP. Both the director's reports to the Board and the Board's annual MYSP review are excellent documents to use when communicating the school board's progress to the public.

It is important for the community to have access to information about student achievement and well-being in their community. Trustees are the point of access to the board. Ongoing communication builds public trust in education and helps boards to develop stronger relationships with the community.

### Question for Reflection

- How can the community and board staff provide feedback on the updates and progress reports concerning our MYSP?

## Looking Ahead

This guide has been designed to help Boards through the strategic planning process. Strategic planning in general, and the MYSP in particular, is the best tool for moving school boards forward. Once developed, the MYSP defines the future destination for a board and provides direction on how to get there.

In essence, it is all about the future of our children and students.

From birth to adulthood, our children and students have hopes and dreams. They strive to learn and do new things. They strive for close relationships with peers and adults. They yearn for connection and a sense of belonging. They want to be liked and respected, and to feel competent and capable. They want to be viewed as rich in potential. They want to be valued. They want to contribute.

We want our schools to be places where children and students feel safe to ask a question in class and to find friends on the playground and in the halls. We want them to feel accepted. We want them to be confident in their identity, to show their beliefs, their faith, and their culture. We want our children and students to embrace their cultural heritage, including their language. We want our classrooms to be safe and to foster curiosity so that students can discover their own learning potential. We want our schools to make it easy for children and students to make healthy choices. We want our committed staff to have all the tools they need to put their good planning into action. We want our families to be strong partners in the education of their children.

We want our communities to benefit from the strength, resiliency, and innovation of our children and students. We want our children and students to bring the caring and creativity they learned in school into the workforce and to their role as citizens. We want them to dream about their future and to be fully supported to make their dreams a reality.

We want our schools to be equitable, not only in opportunity but also in outcomes. We want public education to be the great equalizer.

Every child and student deserves to be sustained in their efforts to pursue their own unique path. It is our responsibility to make this happen and to ensure that each and every one experiences success.

It matters.

It makes a difference.

It is in our hands.

