

# MULTI-YEAR STRATEGIC PLANNING

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A Guide for  
School Board  
Trustees



2017



support every child  
reach every student

 Ontario







## 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.









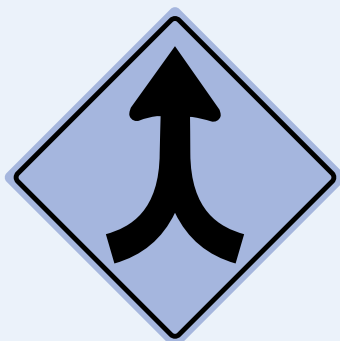


## **Alignment with Effective Practices Outlined in *Strong Districts & Their Leadership***

*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

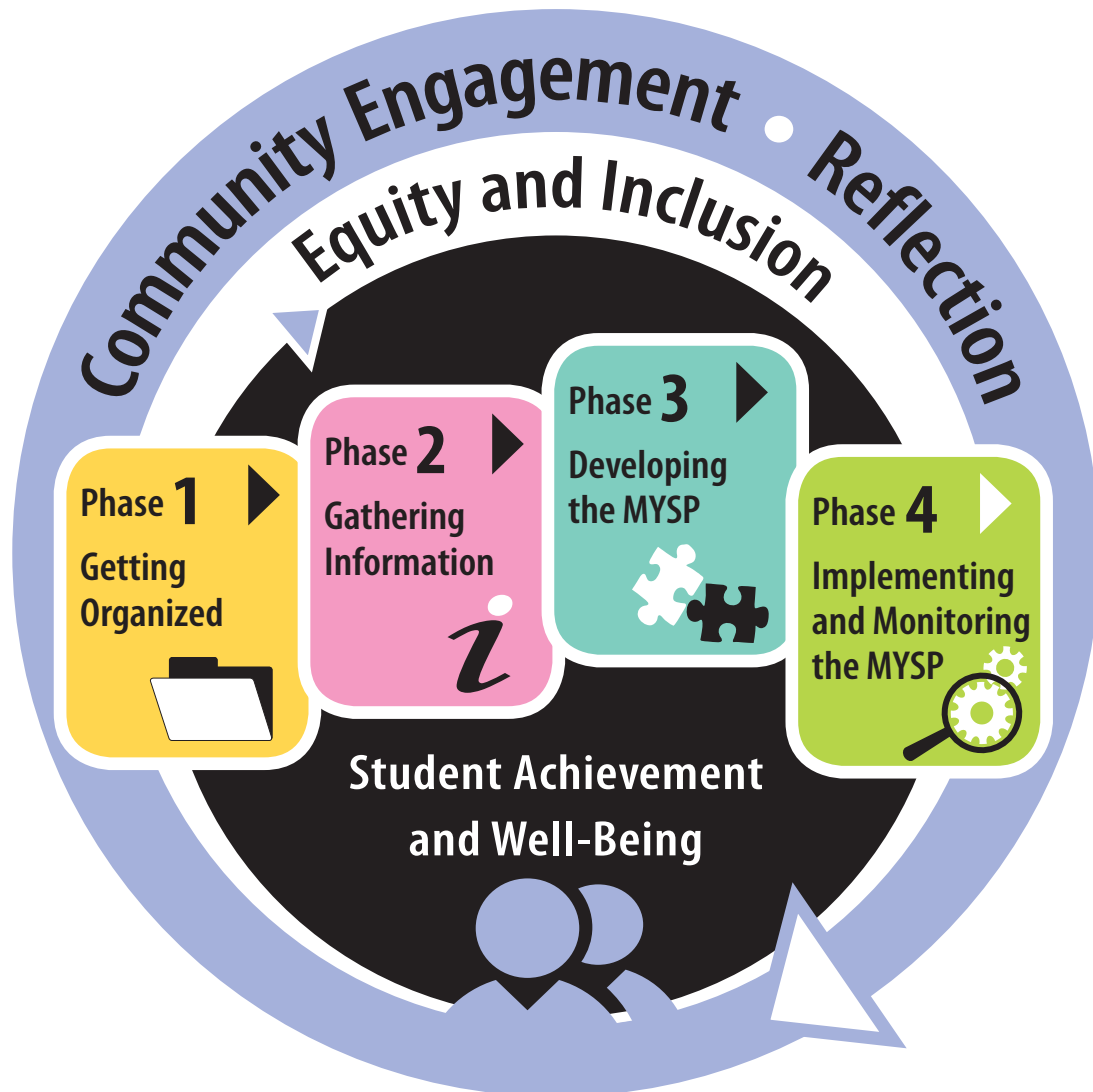
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Under the Education Act, every school board must create a multi-year plan that spans a minimum of three years. The purpose of the MYSP is to help boards set long-term strategic priorities and goals. The plan must be based on evidence to ensure that 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.



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

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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.





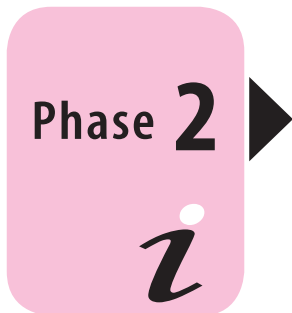












## Gathering Information

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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 MYS.

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 Analyze 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



## 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](#)









## ► 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.

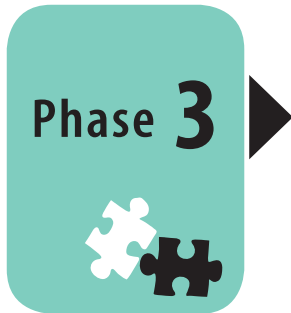
It is vital to capture the feedback from stakeholders accurately. The feedback that the committee receives should be reflected back to each stakeholder group to confirm that they were heard correctly. Some collaboration software programs build in a feedback function. However the confirmation process 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](#)









## Developing the MYSP

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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













## ► 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.







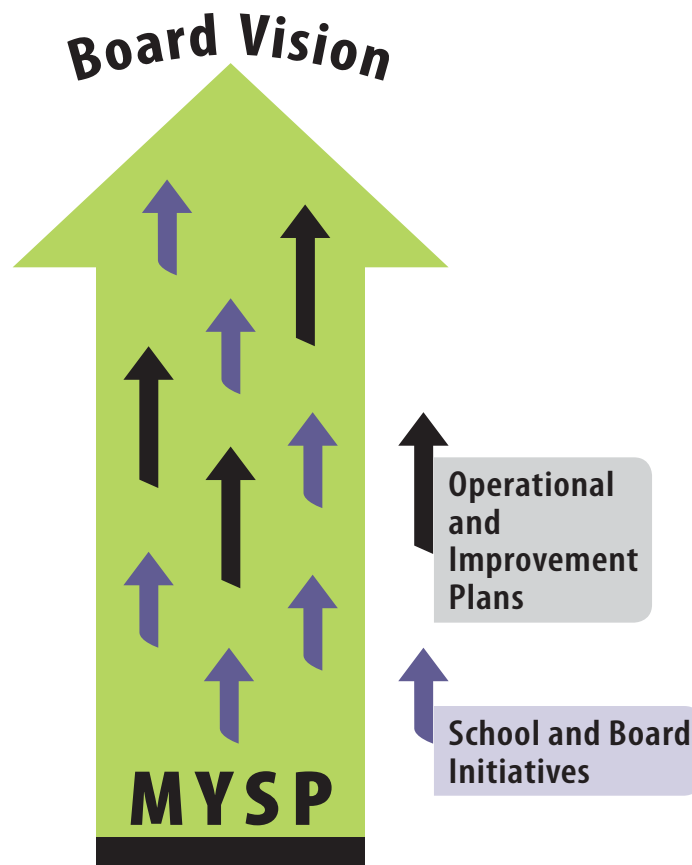
### Step 3. Develop improvement plans



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.



#### 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 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.





## 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.



