

School Division Strategic Planning Process Overview

1. What is Strategic Planning?

- Ontario School Boards Association (OSBA) defines it as a collaborative process by which an organization determines its optimal future
- OSBA states that it involves understanding the bigger context, determining the board's goals and strategies, setting relevant policy, allocating resources and monitoring progress towards realization of the board's mission and vision
- It is one of the most significant leadership roles of a Board of Trustees
- Creating a strong strategic plan requires careful planning at every step of the process

2. Why is it important

- It provides a solid framework for shared ownership and meaningful impact
- It is a driver for change
- A strong strategic plan should:
 - point the way forward
 - provide a framework for how to get there by:
 - detailing the allocation of the board's resources
 - functioning as a guide for the board of trustees and senior administrators when they are making difficult choices
 - illustrating to stakeholders how decisions are made
 - focusing the board's attention when it is dealing with unexpected challenges
 - creating a shared vision for internal and external stakeholders
 - motivating the board's staff and giving employees at every level of the organization a sense of purpose

3. The Strategic Planning Process

- The final decisions relating to the strategic plan are the responsibility of the Board of Trustees
- The plan is **developed through a partnership** involving the Board of Trustees, the superintendent (and staff) and the community
- **Communication and engagement** with internal and external stakeholders is vital throughout the strategic planning process
- **Transparency and collaboration** will improve the quality of the strategic plan and increase the likelihood that it will be adopted by all members of the division and community
- **The superintendent is responsible** for implementing the strategic plan and for developing the action plan to implement the strategic directions

4. The Ontario School Boards Association Strategic Planning Process

- The Ontario School Boards Association outlines a 4-step strategic planning process:
 1. Preparing to Plan

2. Gathering information
3. Developing the Plan
4. Implementing, Monitoring and Communicating the Plan

1. Preparing to Plan

- Start by defining your why
 - School boards need to clearly articulate why they exist and who they serve, and these questions frame all strategic decisions
- Review mission, vision, value statements

2. Gathering Information

- Establish a clear understanding of what is happening by gathering current and relevant information through an environmental scan and engaging with key stakeholders (such as board staff, students, families, and community groups)

Data Collection

- First understand what data is available and what data is needed for the strategic planning process
- Prioritize gathering data that will support effective decision making on equitable outcomes for all students
- The first step is to conduct an Environmental Scan, below are potential data sources:
 - Previous strategic plan
 - Student achievement data
 - Student and staff well-being
 - Information on incidents of bullying, suspension data
 - Enrolment projections
 - Employee surveys
 - Retention and retirement rates
 - Parent engagement
 - School climates
 - Student's sense of safety and belonging (TTFM)
 - Status of buildings and infrastructure
 - Enrolment trends
 - EDI
 - Demographic shifts
 - Economic, political and social climates
 - Changes in policies and legislation
 - Technological trends
 - Legal requirements
 - Provincial requirements
- The second step is to Analyze information, data and knowledge from multiple sources and to arrive at a shared understanding of what the information means
- Find the themes and outliers – themes that suggest a direction for the board
- Identify the tentative strategic priorities as a result of the data analyze process

Engaging Stakeholders

- Engaging with stakeholders is fundamental to developing the strategic plan and to ensuring that it is adopted and supported by the community
- **Two types of Community 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 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
 - Formal Stakeholder Engagement:
 - It is a part of the strategic planning process that involves actively soliciting the views, concerns, ideas, and questions
 - It is efficient to make good use of existing structures, such as parent councils, and community partnerships, as well as existing gatherings, such as senior administrator meetings, admin council, and student council meetings to gather input
- **Steps to Engaging Stakeholders**
 - **Identify the stakeholders**
 - Diverse groups of stakeholders should be engaged
 - It is important to first identify what the board needs to know and then decide which stakeholders might be able to provide the necessary information and perspective
 - When engaging with stakeholders, the board should keep an open mind and be prepared to hear things they may not want to hear
 - Community voices are crucial, and not only the loud voices, but the quiet ones, the minority ones, the under-represented ones
 - Include the voice of children, students and staff
 - Parent, Indigenous and newcomer voices are important
 - **Determine the Engagement Process and Questions**
 - A formal stakeholder engagement process can be conducted in various ways – through online surveys, collaboration software, social media, teleconferencing, interviews and focus groups, and town hall or community meetings
 - Questions should be brief, straightforward, open-ended, unbiased, and meaningful to the stakeholders
 - **Conduct the Engagement Process**
 - The board may lead the engagement itself, work with a third-party facilitator, or, engage stakeholders from either within or outside the board to facilitate the engagement process
 - 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 board receives should be reflected back to each stakeholder group Analyse the Findings
- **Find the Themes**
 - Compare the stakeholder feedback to the environmental scan data
 - The findings from the formal stakeholder engagement and the research data should be consistent

3. Developing the Plan

- Based on the evidence that has been gathered, the board of trustees and senior administrators decide on the direction to take for the school board's future
- **Develop Strategic Priorities**
 - A strategic priority or direction is an area of high importance that the board establishes in order to realize its vision
 - A strategic priority provides a framework for organizing, defining, and communicating strategic goals
- **Develop Strategic Goals**
 - Once the strategic priorities are finalized, the board develops the corresponding strategic goals
 - Each strategic priority should have at least one strategic goal
 - The strategic goal(s) or outcomes are what an organization will achieve over the course of its strategic plan
 - Strategic goals will provide focus to the priority areas and determine where to allocate the board's resources
 - The goals should also be aligned with the vision, mission, and values statements of the board
 - The goals should be SMART goals – specific, measurable, realistic and time bound
- **Develop Indicators of Success**
 - An indicator refers to the means by which a goal can be judged to have been achieved or not achieved
 - Indicators can further define the goals and serve as 'yardsticks' by which to measure the degree of success in goal achievement
 - Indicators are specific quantitative or qualitative measurement information to indicate the progression or level of success in achieving a goal
 - Indicators are specific descriptions of what success will look like, so that the parameters are clear when the progress of each goal is measured.

4. Implementing the Plan, Monitoring Progress and Communicating Results

- Implementing the plan requires the operationalization of the strategic directions
- The superintendent works collaboratively with senior administration and school-based administrators to develop the operational plan which includes the action plan
- **Develop Strategies**
 - Use the data collected, to determine key strategies to reach each goal
 - A strategy is a set of planned, appropriate and optimal approaches and solutions that enable the board to reach a goal

- When selecting strategies, the key questions are:
 1. Does the strategy address critical issues?
 2. Is it aligned with our mission?
 3. Is this strategy financially viable?
 4. What are the resources or the capacities required to accomplish the strategy?
- **Determine Data Collection Tools**
 - How will we measure progress towards each strategic direction?
 - ii. Student achievement data
 - iii. TTFM
 - iv. EDI
- **Develop Action Plans**
 - For each strategy clearly articulate, what? How? When? Who? Resources? Status?
- **School Improvement Plans and Individual Growth Plans**
 - Senior Administration ensures that school improvement plans, individual growth plans are aligned to the strategic plan
- **Board Development plan is aligned to the strategic plan**
- **Develop the Annual Board Budget**
 - Allocate appropriate budget and resources to implement the goals
 - The board budget is a dollar-based reflection of the strategic plan, with the same strategic priorities and goals identified and supported
- **Monitor Progress**
 - Review the strategic plan annually with the board of trustees
 - With the 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
 - The annual review of the strategic plan provides an opportunity for the board of trustees to keep the strategic plan at the forefront of all board decision making
 - The superintendent's regular reports further update progress on the strategic plan
- **Division Plan Report and Community Report**
 - It is good practice for the board of trustees to report regularly to the broader community, providing the public with information about the progress that has been made towards achieving the goals in the strategic plan
 - Division Plan Report – provides a comprehensive review of progress to date and is submitted to Manitoba Education and Training
 - Community Report – provides an overview of progress to date and it is shared with community members, staff, students and parents

Source: <http://modules.ontarioschooltrustees.org/en/the-strategic-role-and-multi-year-strategic-planning.html>